



Measure J Paratransit Program 15 Claim
FY 24-25 Project Description

Claimant/Agency: East Bay Paratransit, on behalf of AC Transit and BART

Project Description:

1) If your claim will be used, entirely or in part, to operate a vehicle that provides service to seniors and/or persons with disabilities please provide:

a) Brief Paratransit System History

History: The East Bay Paratransit Consortium (EBPC) was established in 1994 by the Alameda-Contra Costa Transit District (AC Transit) and the San Francisco Bay Area Rapid Transit District (BART) under a cooperative agreement to jointly provide paratransit services mandated by the Americans with Disabilities Act (ADA) throughout the overlapping service areas of the two transit agencies. EBPC is an ADA paratransit service for people who are prevented from using accessible AC Transit buses or BART trains because of a disability or a health-related condition. Contra Costa County passengers account for approximately 11.5% of the service with costs estimated at \$4.8M FY23, \$6.3M FY24, and \$7.4M FY25. EBPC's design for the ADA system, which has been in place since the service started, is a centralized paratransit Broker who, in turn, contracts with service providers. The current paratransit Broker, Transdev, is responsible for certification, reservations, scheduling, call center activities, reporting, and contracting with and monitoring service providers.

b) Types of service: *Check the box for each type of service you provide, and for each, provide a description of the service including a system overview, how the service is delivered (contracted, in-house), driver training, how service is monitored for effectiveness, fares, etc. Include attachments if appropriate.*

X Paratransit Service:

Taxi/TNC:

Excursion Service:

Meal trips:

Dial-A-Ride:

Volunteer Driver Program:

Other:

System overview: Individuals must be certified to use EBPC's ADA services. EBPC uses both a written application form and a mandatory in-person assessment (IPA). In some cases, the Certification Department will request information from the applicant's health care professional. An applicant who is found eligible is certified for five years. At the end of that period, the rider must recertify with EBPC, although further interviews are not required in most cases.

EBPC serves the East Bay communities of Western Contra Costa County and Alameda County, covering approximately 400 square miles. A “No Transfer” service is also provided into and out of San Francisco from EBPC’s service area. In most cases, EBPC coordinates long distance “Regional” trips outside of the EBPC service area. These require a transfer from EBPC to a second service. In most cases, riders can make a reservation for the entire trip through EBPC

EBPC operates during the same days and hours as AC Transit and BART’s regular fixed-route services. All trips are by reservation, which can be made from 8:00 am to 5:00 p.m. daily, seven days per week. Reservations are accepted up to 7 days in advance. Standing order reservations can be set up for recurring trips in certain circumstances. Trips are provided in accessible lift vans. Service is a shared ride. In compliance with the ADA, EBPC does not impose limitations on the number of trips a rider can take, nor are trip requests prioritized.

Driver Training: Within the contract between Transdev and each Service Provider is a driver training program requirement which addresses all staff positions, including drivers. The program is approved by the Broker prior to implementation. The training program includes, but is not limited to, the following areas:

- Job function, Operation of equipment, and Emergency Preparedness
- Driver training that meets Federal and State requirements for ADA service and vehicle type
- ADA requirements: defensive and safe driving, passenger assistance; First-aid, and CPR training
- EBP history and policies
- Disability and aging awareness and sensitivity
- Diversity awareness and sensitivity, including cultural, racial, sexual orientation, age, and gender
- Recognizing and reporting harassment

Monitoring: Financial and operational information is compiled, verified, and reviewed monthly by agency staff. In addition, a performance report of key indicators is available for public review and is distributed in conjunction with EBPC’s rider advisory committee meetings, the East Bay Paratransit Access Committee (EBPAC).

EBPC contracts for an independent annual telephone survey of a random sample of 400+ riders. This Customer Satisfaction Survey asks questions about many aspects of the service including overall customer satisfaction. Other methods to obtain customer feedback include:

- Call East Bay Paratransit and speak with a Customer Service Representative
- Call East Bay Paratransit and leave a message in the Service Comments Mailbox
- Write to the East Bay Paratransit Administration Office
- Submit a comment through the website: www.eastbayparatransit.org

Customer complaints received by the Broker’s Office by telephone, letter, or in person and are categorized, responded to and tracked. The numbers of complaints are reported to staff and to the EBPAC by category. Complaint statistics and details are used to determine areas of the service needing attention from staff. Information uncovered in the complaint process is used to improve the service most often through specific attention to individual employees or through modification of service practices.

EBPC data is audited by MTC (TDA Performance), and the BART internal audit department conducts periodic reviews. EBPC is also included in the FTA’s Triennial

Review of both AC Transit and BART.

EBPC staff also participates regularly in paratransit rider-based committees, such as Alameda County Transportation Commission’s Technical Advisory Committee (ParaTAC) and Paratransit Advisory and Planning Committee (PAPCO), the Contra Costa County Paratransit Coordinating Council (PCC), AC Transit’s General Manager’s Access Committee (GMAC), and the BART Accessible Task Force (BATF).

EBPC Fares: EBPC fares are distance based and can be paid either in cash, the East Bay Paratransit Contactless Payment App, or tickets. Books of ten tickets are available for purchase by mail from East Bay Paratransit, at the AC Transit and BART ticket offices and at a kiosk at EBPC’s office in downtown Oakland. There is no fare for personal care attendants, but a companion traveling with the paratransit rider pays the same fare as the rider. The Customer Services Agent quotes the fare for the trip when the ride is scheduled. Fares are calculated as follows for each one-way trip and are currently described in the table below:

For service in the East Bay			
<i>Fare</i>	<i>Distance</i>		
\$4.00	0 to 12 miles		
\$6.00	>12 miles, up to 20 miles		
\$7.00	>20 miles		
For service to/from San Francisco*			
1) If your trip starts or ends in:		2) And your pick-up or drop-off is:	
		<i>Up to Civic Center BART</i>	<i>Beyond Civic Center BART</i>
		<i>Any Daly City address</i>	
		3) Your fare is	
<u>Zone 1:</u> Alameda, Berkeley, Emeryville, Piedmont, Oakland		\$6.00	\$7.00
<u>Zone 2:</u> Albany, Castro Valley, El Cerrito, El Sobrante, Kensington, Orinda BART, San Leandro, San Lorenzo, Richmond, San Pablo		\$7.00	\$8.00
<u>Zone 3:</u> Fremont, Hayward, Hercules, Milpitas, Newark, Pleasanton BART, Pinole, Union City		\$8.00	\$9.00
			\$10.00

* San Francisco trips which go beyond the BART service territory

2) Budgets & Staffing: Complete attached Budget Spreadsheets

- a) Budget: If your agency received Measure J Program 15 funds in the past 3 years and did not spend the entire allocation for any reason, provide details here for how the funds will be spent. NOTE: Any funds must be spent in support of the agency's program to provide transportation services to seniors and people with disabilities.

N/A – All funds expended

- b) Staffing: Please complete the table below.

Position	Full Time	Part Time	Total FTEs	Total PTEs
Drivers	224	4	224	4
Dispatch	15	1	15	1
Admin	67	5	67	5
Other				

- c) Staffing: For 'Admin' and 'Other' staffing positions noted in the above chart, please provide a brief description of the functions performed.

- Customer Service
- Reservations
- Billing/Trip Reconciliation
- Paratransit Eligibility Processing
- Complaint Response
- Reception
- IT
- Dispatching
- Road Supervision
- Route optimization
- Team supervision
- Drug & Alcohol Policy Processing/Enforcement

- d) Staffing: If your program expends Measure J Program 15 funds for personnel who are not actively engaged in the delivery of services, please explain.

N/A

- 3) Training: What initial training is provided to staff (admin and drivers) when they become part of your service team? What on-going training or certification does your staff participate in to qualify them to do the job (admin and drivers)?

Admin staff receive ADA Paratransit, Transportation Management Software (StrataGen ADEPT), and East Bay Paratransit service training during the initial onboarding. Additionally, admin staff receive customer service training, disability sensitivity & awareness training, and ongoing trainings and workshops to ensure service level expectations are being met and departments are up to date on industry standards and best practices.

Please see attachment 3- East Bay Driver Training Requirements for driver training.

- a) What training do Customer Service staff receive? Attach training curriculum if you have it.

Customer Service staff receives the same above training for admin staff. Please see attachment 3A- Customer Service Workshop for additional training information.

- 4) Liability & Testing: What insurance liabilities do you have to protect staff and passengers?

- a) Are staff subject to drug and alcohol testing. If so, under what circumstances?

All candidates are subject to pre-employment drug testing. Random drug tests are administered to employees in safety-sensitive positions. Drug and alcohol testing is also administered to operator staff post-accident if a vehicle was towed. Reasonable suspicion may also result in testing.

- b) How are accidents and incidents handled? Is specialized training or materials provided to staff?

Accidents and incidents are recorded using designated forms by both the SPs and EBP. Service Providers are responsible for completing the initial accident packet then forwarding it to EBP. Broker Dispatch also records accidents and incidents as reported by driver and SP window dispatch. The information is stored in EBPs Adept SAFETY and Security folder.

- 5) If your claim will be used, entirely or in part, to provide a program other than operating a vehicle, please provide the following:

- a) Brief description of the program including a brief history of the program, who the program serves, reason for the program, marketing efforts, etc.

N/A

- b) If the program includes subsidizing paratransit or taxi or other ride hailing service (Uber, Lyft, etc.) fares please include the amount of the subsidy and explain in detail how your program works. Include a service area map of what zones you pick up in and what zones you drop off in. Please include any marketing materials you distribute and discuss how people learn about your program. Explain how people order a trip. If you serve pick-up locations outside your city, please list the number of pick-ups each month you provided to these "outside" areas.

N/A

- c) In these programs, how do you ensure that mobility aid users and ambulatory customers have equivalent access and service reliability?

N/A

- 6) Please provide a brief description of how your agency solicits feedback from passengers and potential passengers about your service, (i.e., surveys, comment cards, customer service logs).

EBPC contracts for an independent annual telephone survey of a random sample of 400+ riders. This Customer Satisfaction Survey asks questions about many aspects of the service including overall customer satisfaction. Other methods to obtain customer feedback include:

- Call East Bay Paratransit and speak with a Customer Service Representative
- Call East Bay Paratransit and leave a message in the Service Comments Mailbox
- Write to the East Bay Paratransit Administration Office
- Submit a comment through the website: www.eastbayparatransit.org

- a) How do you utilize that input to inform and improve your program?

Complaint statistics and details are used to determine areas of the service needing attention. Information uncovered in the complaint process is used to improve the service, most often through specific attention and retraining of individual employees or through modification of service practices.

- b) Do you have a committee of residents that meets to discuss your program? Explain how often this group meets and how it is staffed.

EBPC staff works with its rider committee, the East Bay Paratransit Access Committee (EBPAC) who advises management staff on a variety of items including changes to procedures or policies, reviewing budgets and funding claims, and outreach to people with disabilities. Comments and support for changes are obtained prior to implementation.

The EBPAC consists of 16 members: 12 EBPC riders from all over the service area & 4 members from city programs and Social Service Agencies with ADA riders as clients. The EBPAC also advises the Service Review Committee (SRC) comprised of the AC Transit and BART General Manager and/or their designees, on matters relating to the provision of paratransit services. The EBPAC meets every other month, the meetings are publicly noticed, and public comment is welcome. An announcement about the EBPAC is included in phone hold messages and on eastbayparatransit.org so interested individuals may attend. Meeting materials are sent to everyone who requests them.

- 7) How do you record and track customer complaints. What procedures do you have in place to resolve them?

Customer complaints received by the Broker's Office by telephone, letter, or in person

and are categorized, responded to and tracked. The numbers of complaints are reported by category to staff monthly and to the EBPC every other month. Complaint statistics and details are used to determine areas of the service needing attention from staff. Information uncovered in the complaint process is used to improve the service most often through specific attention to individual employees or through modification of service practices. Escalated complaints are handled by the third-party Paratransit Coordinator Office, staffed by Paratransit, Inc.

- a) What customer service metrics do you track: ie Phone hold times, late/early pick-ups, fare disputes, loading problems, etc. How are these metrics trending year over year?

Please see attachment 7A- Customer Service Statistics.

Note: Customer complaints increased between FY 22 and FY 23 due to a significant increase in ridership as pandemic recovery efforts took place.

- b) If you have vendors delivering service on your behalf, what procedures do you have in place to gather and resolve complaints they receive.

All Service Providers participate in the investigation and resolution process with the Broker's Office. Any escalated complaints are handled by the Paratransit Coordinator Office.

- 8) Please describe how your service is monitored and what criteria you use. Include tools you use to monitor performance, frequency of monitoring and reports generated. Include samples of reports from software used by your agency.

EBPC service is monitored monthly by EBPC staff via a Monthly Operations Report. This report includes service costs, accidents, and customer service statistics.

Please see attachment 8- Ops Report for an example of the Monthly Operations Report.

- a) Please include the key performance indicators you use to measure the success of your program in the chart below. (Example: cost per passenger, on-time performance, complaints)

Metric	Goal	Prior FY	FY YTD
Cost Per Passenger		\$105.59	\$116.36
On-Time Performance	95%	96.9%	96.5%
Complaints as % of Revenue Passenger		0.33%	.38%
Average Queue Wait Time	< 2:00	1:45	1:42
Accidents per 100k Miles		4.0	3.4
Passenger Per Revenue Hour	1.50	1.15	1.15
Productivity (passengers/rev hours)		1.30	1.30

Note: Not all EBP metrics have goals but are monitored for trends.

- b) If services have degraded per the performance metrics reported, what were the reasons, and what actions are you taking to improve service?

The Broker's Office has identified routes that are not contributing positively to productivity and is in process of adjusting routes to improve efficiency. Many metrics are affected by post-pandemic recovery, such as increased traffic around the Bay Area and an increase in rider requests.

- 9) Please describe how, and with what frequency, your policy makers (Board or Council) review operating budget and performance of the service you provide. Do you submit an annual report to your Board or Council? Please include that document in this claim.

The BART and AC Transit Boards of Directors review the agencies' respective paratransit operating budgets annually as part of approval of each Fiscal Year's operating budget. Every other month the East Bay Paratransit Access Committee (EBPAC) meets to discuss service and the budget. Quarterly key performance reports are presented comparing current service to service from the previous year.

Please see attachment 9- Broker's Report for the quarterly key performance report.

- 10) How many people are registered in your client database now? How many unincorporated area residents does this include? How often do you review and update this database to reflect changes in client eligibility or activity?

As of April 2024, the EBP rider base is 11,318. Unincorporated residents total 434 clients. This information is updated daily.

- a) How many of those in your client database are active riders (i.e., took at least one ride in the last six months)?

Active unincorporated residents total 196 clients.

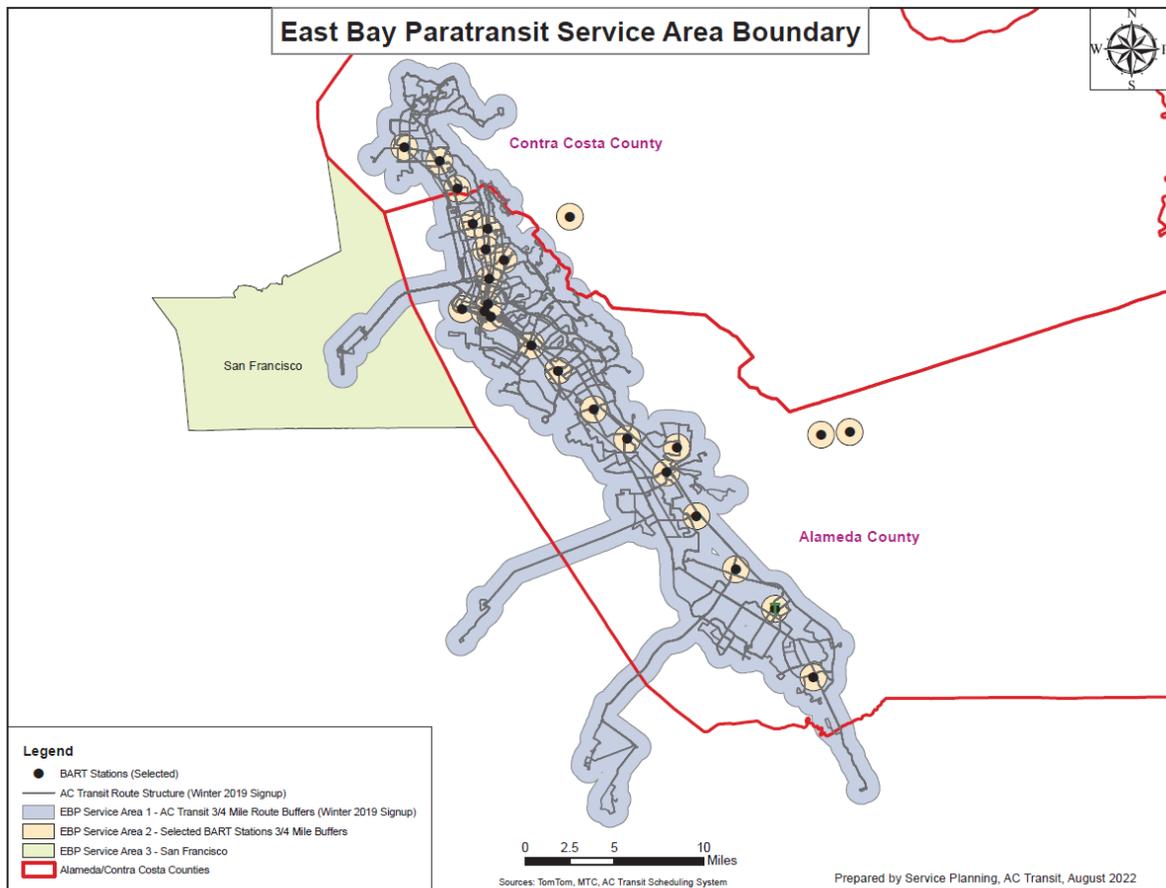
- 11) Please discuss any known unmet paratransit needs in your service area. For example, residents asking to be picked-up or dropped off outside your service area to

medical facilities in another city, specific locations that are frequently requested that are not within your service area, requests for additional hours or days of service, etc. EBPC meets all ADA paratransit needs within its service area.

- 12) Service Area: Please provide a map of the service area and tables to illustrate the data, as appropriate. Describe both who is geographically eligible to ride your service and where your service will take and pick up those eligible riders.

East Bay Paratransit service is available within the AC Transit and BART areas shown on the map below.

Map of Service Area



East Bay Paratransit serves the following cities:

Alameda	Albany
Berkeley	Castro Valley
El Cerrito	El Sobrante
Emeryville	Fremont
Hayward	Kensington
Milpitas (part)	Newark
Oakland	Piedmont

Pinole (part)	Richmond
San Leandro	San Pablo
Union City	

Riders can also go to and from any of these cities to anywhere in San Francisco, and elsewhere in the Bay Area, beyond these cities by transferring to other ADA paratransit services.

- 13) Please share how you promote and market the programs you offer to potential new clients. Describe your outreach efforts in terms of Limited English Proficiency and Title VI. Attach your public-facing promotional materials, including your website address. Are your outreach materials available in languages other than English? If so, what languages?

EBPC informs potential users of ADA services through brochures and Rider's Guides, which have been widely distributed to individuals, Senior Centers, social workers, dialysis centers, city program managers, adult day health centers and others. Information about EBPC is mentioned on both BART's and AC Transit's websites and in written materials about the agencies. EBPC has its own website at eastbayparatransit.org.

EBPC staff organizes or participates in numerous rider committee meetings, discussions with Social Service agency representatives, senior and disabled fairs, and paratransit and public transportation forums.

EBPC has made significant efforts to accommodate non-English speaking clients. All applications are available in both Spanish and Chinese in addition to English. Additionally, on-site Spanish and Chinese speaking customer service representatives are available during business hours. Should a rider or potential client need assistance in a language other than Spanish or Chinese, all customer service representatives are trained to access language link, a service that connects representatives with translators.

- 14) Please provide any additional information that you feel is unique or relevant to the transportation service that you provide to seniors or people with disabilities.

EBPC recently implemented an Interactive Voice Response (IVR) system to streamline phone services. As part of the phone system upgrades, EBPC has also implemented reminder calls to notify riders of their reservations the following day.

EBPC recently applied for and was approved for a grant from Alameda CTC to develop a travel training program that targets conditionally approved EBP applicants. This program will also serve EBP applicants within Contra Costa County.

- 15) **West County Operators Only** Program 20b: Please describe how your agency will use program 20b funds (the amount your agency will receive is provided in the budget form). Note: It is the intent of the Measure J Transportation Expenditure

Plan that Program 20b funds be used to provide “additional or new services” beyond what was previously provided under Measure C or “regular” service. If you previously started a new or additional service with these funds you can continue to use these funds to operate that service as long as it is productive.

N/A




Driver Training for East Bay Paratransit

Cynthia Lopez, GM
Transdev NA
Oakland, CA

1

Transdev- IntelliRide



- Transdev (Broker) contracts with 3 dedicated Service Providers (331) active drivers
- First Transit – Oakland
- MV Transportation – San Leandro
- A-Paratransit – San Leandro



2

What does it take to drive for East Bay Paratransit?

- Class B (P endorsement) required
- Pre-employment drug screen (DOT regulated)
- Pass Criminal Background check
- Have a current DMV report or pull notice (with no more than 3 points in the past 3 years)
- No license suspensions (with 2 yrs., no DUIs)
- Have to be an experienced, licensed driver for at least 3 years
- Pass a DOT – physical by a DOT certified Doctor
- Subjected to random DOT drug screens
- Certified in CPR & First Aid
- VTT certificate




3

Classroom Basics



Start to finish – all Providers average:

- 2 or 3 days (16-24 hrs) CDL prep
- Drivers take written CDL test Class B and obtain permit
- 40 hours of classroom (operations)
- 16 hours learning basic skills (backing, turning the vehicle, driving in a confined area (coned off area in a empty parking lot)
- 24 hours (BTW) – driving with an instructor on City streets, freeways and in traffic
- Drivers scheduled to take drive test (DMV-ETP certified instructor on an approved DMV course)
- 16 hours cadetting (in service), but with another driver to assist

Total: 100-120 hours



4

Other key items learned:

- Pre-Trip Inspections
- Smith System or LLLC Defensive Driving
- Accident avoidance/prevention
- WC securement and operating bus equipment lifts and ramps
- Conflict management
- Difficult locations (BART stations, hospital or location loading areas, avoiding overhangs and awnings)
- MSlate training (MDC unit)
- Map or GPS training



P.A.S.S. - CTAA's Passenger Assistance, Safety and Sensitivity (PASS) driver training program is the recognized industry standard when it comes to ensuring that passengers are transported in the most safe, sensitive and careful manner possible. ... PASS trained drivers know how to safely and sensitively transport everyone.

- Intro to ADA & Disability sensitivity
- Original certification and annual re-certification

5

Transdev (IntelliRide) Broker Responsible for:



- Contract Basics (What is East Bay Paratransit)
- Expectations of service (Door to door, passenger assistance)
- Incident/Accident Reporting Protocol
- Communication Basics w/ Dispatch
- What to do when you need assistance (help)
- Compliance
 - Road Supervision (spots checks, road observation, some ride-a-longs), audit training records, accident reporting, oversee D/A compliance provide training for drivers working for EBPT contract as part of training class



6

East Bay Paratransit Customer Service Workshop



1

Workshop Agenda

- Part 1
 - Agenda
 - Learning Objectives
- Part 2
 - Disability Etiquette
 - Effectively Managing Calls – Best Practices and Call Examples
 - Role Play Exercises

2

Learning Objectives

- Refresher on ADA guidelines
- Understand regulatory requirements, policies, and passenger expectations
- Learn about creating customer experience excellence
- Put ourselves in our passengers' shoes and identify their needs
- Understand disability etiquette and best approaches to improve passenger satisfaction
- Feel comfortable using tools and scripts
- Ensure empowerment to resolve

3

Americans With Disabilities Act

Understanding Your Role

4

What is the ADA?

- ADA
 - The Americans with Disabilities Act of 1990 (ADA) prohibits discrimination and ensures equal opportunity and access for persons with disabilities.
 - The ADA requires public transit agencies that provide fixed-route service to provide "complementary paratransit" service to people with disabilities who cannot use the fixed-route bus or rail service because of a disability. The ADA regulations specifically define a population of customer who are entitled to this service as a civil right. The regulations also define minimum service characteristics that must be met for this service to be considered equivalent to the fixed-route service it is intended to complement.

5

ADA Scenario

- Caller demands they are picked up at their home at 10:00am today for their appointment. They say that you have to accommodate them because of the ADA law.
 - What do you do? How do you answer this question and manage this call?

6

ADA Scheduling Scenario

- Caller wants to schedule a pick-up for a doctor's appointment at 11:00am. They ask to be picked up at 10:45am from their home. However, you know the driver will take at least 15 minutes without traffic and they should have a time buffer to ensure they make their appointment.
 - What do you do? How do you answer this question and manage this call?

7

Chapter 8: Trip Reservations - Arrival Time Considerations

- **Arrival-time constraints**
 - Discussion of rider's needed arrival time will sometimes be part of the trip scheduling negotiation
 - Agencies are in the best position to know how long a trip will take
- **Related capacity constraint:**
 - Untimely drop-offs can discourage riders from using service



FTA

8

Call Center Goals

What are the Expectations?



9

What You're Currently Doing...

- Taking reservations and scheduling trips
- Scheduling subscriptions
- Dispatching rides and supporting drivers with their routes
- Answering customer questions about rides and schedules
- Managing no-show and cancellations
- Addressing issues with trips



10

Discussion – What's Missing?

- Do you have all the tools you need to be successful?
- What tools would you like to have?
- What would you like to see changed?
- What information would you like passengers to have?
- Do you have any other suggestions?

11

Our Promise to East Bay Paratransit

- Provide excellent customer service and communicate correct information
- Answer all calls professionally
- Ensure rides and subscriptions are scheduled properly
- Dispatch and manage trips effectively
- Support drivers in making their trips on time and handling issues
- Make safety a priority



12

Call Center Goals

- Deliver excellent customer service, with kindness and care
- Achieve a call abandonment rate of less than 4%
- Answer calls in less than 2 minutes (avg queue hold)
- Handle calls efficiently and eliminate chat
- Address and resolve concerns on the first attempt
- Create a respectful and professional environment



13

Being Customer Driven

What do customers really want?



14

Caring About the Customer Experience

It all starts....
By putting ourselves (and our team) into the customer's shoes and to better understand their point of view.

Before we look at the East Bay Paratransit Customer Experience, let's take a different example... just to get used to thinking this way...



15

We are ALL Customers!



16

Exercise

What happens when I'm a customer?

- When you are a customer what do you LOVE and HATE about your experience in different service industries?
 - Bank, leisure center, restaurant...




17

PART ONE: Working on customer pathways

MEET TINA: Tina is a 30-year-old woman who has just move to the area with her daughter. She needs to use EBPT to get to her office. She will be riding for the very first time.

1. Discuss major **STAGES** along the customer pathway for bus and paratransit passengers.
2. For each **STAGE**, brainstorm a list of **EVENTS**



18

Put Yourself in the Customer's Shoes

- This will help give insight and understanding of what the passenger is going through and may help you not to take passenger responses and emotions personally. The customer pathways shown below describes the entire passenger journey from start to finish.

19

The Customer's Expectations

I EXPECT SERVICE

- > To have access to the service
- > To be informed
- > To be serviced
- > To get answers, advice
- > To get help
- > To find a solution
- > ...

80% Operational processes

I EXPECT A POSITIVE EXPERIENCE

- > To be welcomed
- > To be listened to
- > To be able to trust
- > To be reassured
- > To feel that it is my transportation system
- > ...

20% Customer care

QUALITY OF SERVICE

20

THREE EMOTIONAL ENVIRONMENTS

FOR OUR PASSENGERS, THIS MEANS

The passenger wants to travel with us and feel comfortable

TAKE CARE

Something is not clear or correct travelling with us and passengers feel unsure

KEEP CONTACT

An incident happens with the service and the passenger is upset and angry

TAKE INITIATIVE

21

Identify Emotional Environments that Impact Customer Reactions

- By recognizing emotions, you will have the tools to help assess situations from the passenger's point of view and respond appropriately.
- You may not be able to control things that happen on daily routes (traffic, accidents, etc.), but you can influence every experience with passengers based on what you say, how you say it and what you do.

22

Shine the Light on the Customer

- See the situation from the passenger point of view
- Asses the emotional state (green yellow, red)
- Act accordingly to keep them at green or get them to green

23

TO SUM UP WHAT WE HAVE TO DO...

Take care of the customers

TAKE CARE

Keep contact with the customers to reassure them

KEEP CONTACT

Quickly fixing the situation is your first priority

TAKE INITIATIVE

... AND WE WILL CHANGE THE CUSTOMER EXPERIENCE

24

TAKE CARE OF THE CUSTOMER

IN A GREEN ENVIRONMENT



TAKE CARE

- > **Recognize:** make contact, show they are heard
- > **Respect:** be polite, greet the customer, treat them as you'd like to be treated
- > **Empathy:** go the extra mile

25

Green Environment: Let's Recap

- > What does the green environment give the customer?
A feeling of well being – they are recognized, cared for
- > How do we create a green environment?
Initial contact, anticipate, be pleasant and helpful
- > What attitudes is care made of?
Recognize, show Respect, show Empathy
- > What's in it for me?
A job well done, commendation, a happy customer, feeling successful
- > And on the days I'm not sure I feel like it?
I can choose from myself to enjoy the day and feel "Green"!

EXERCISE


 Group work

 5'

26

KEEP CONTACT WITH THE CUSTOMER

IN A YELLOW ENVIRONMENT



KEEP CONTACT

- > **1 Be "on the case" immediately**
- > **2 Explore** the situation by asking questions: show you genuinely care
- > **3 Propose a solution** and check the customer is OK with it
- > **4 Demonstrate your presence** throughout the whole process

27

Yellow Environment: Let's Recap

- > What does the customer in "Yellow" really need?
To be reassured
- > What's the most important thing to do?
Communicate
- > What are the four stages to "Keep Contact"?
Demonstrate your presence, Propose a solution, Explore the situation, Be "on the case" immediately
- > What's important about how I communicate?
Voice, words
- > What's in it for me?
Customer avoids "Red", we're both feeling "Green"!

EXERCISE


 Group work

 5'

28

COMMUNICATE AND RESTORE TRUST

YELLOW ENVIRONMENT



ACTIVE LISTENING

You must be active, and show you are listening and truly concerned.
Less communication = More stress
More communication = Less stress

- > **Asking questions**
- > **Silence**
- > **Reformulating/rephrasing**
- > **Summarizing**
- > **Tone of Voice** (smile when you're talking)
- > **Neutrality**

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HANDLING CHALLENGING SITUATIONS



TAKE INITIATIVE

Quickly fixing the situation is your first priority

30

GETTING OUT
OF A RED ENVIRONMENT



TAKE INITIATIVE

- > Be the first to take action
- > Restore calm
- > Offer solutions
- > FFF: the Friendly, Factual and Firm approach

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ATTITUDE AND METHOD
RED ENVIRONMENT



RESTORE CALM

- > Approach disruptive passengers by **putting yourself in the position of a "partner"**
- > **Explore the situation:** what is the problem ?
(questions, questions, questions...)
- > **Never confuse the problem and the person:** it is about what people do and not about who people are
- > **Be specific** about expected behavior and rules on the system *(see FFF approach)*
- > Balance the impersonal nature of rules with **personal interaction**

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ATTITUDE AND METHOD
RED ENVIRONMENT



OFFER SOLUTIONS

Once you have explored the situation, try offering a "way out"

- > A **concrete solution:**
 - Correct the information, repeat their request and repeat the directions clearly.
 - I have contacted operations; a vehicle will be here in ten minutes. We apologize for the inconvenience.
- > A "psychological" solution:
 - I understand your confusion, anger... I will personally inform the manager of your problem, if you will please leave us your preferred contact information....
 - Please contact East Bay Paratransit customer service, and we will try to resolve the issue as best we can.

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FRIENDLY, FACTUAL, FIRM APPROACH
RED ENVIRONMENT



FFF

- > **Friendly**
 - Make contact and keep a friendly, understanding attitude
 - *I don't want to spoil your good mood...*
- > **Factual**
 - Link the **FRIENDLY** and the **FIRM** by ways of a factual statement
 - *...But the fact is that ...*
- > **Firm**
 - Remind there the rule to observe is the company's, *(or municipality's, or the law's)* decision and not your personal one
 - *...drinking alcohol isn't allowed on board.*

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FFF Approach

USE THE TWO-PART APPROACH TO TRANSLATE THESE "CRUDE" STATEMENTS

- There isn't any smoking in my bus!
- Where did you learn to put your feet on the seats like that?!
- You're not going to drink on the bus, are you?!
- Quiet back there! Don't make so much noise!
- You don't have to yell at me! Stop it!

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Emotional Environments - Review

- **There are three emotional environments identified:**
 - Green Passengers: Connect – welcome, engage & empathize
 - Yellow Passengers: Inform – respond, ask, check, manage
 - Red Passengers: Act – assist, take charge, restore

CONNECT	INFORM	ACT
		
The passenger is a regular rider and feels comfortable.	The passenger feels unsure; could be first time riding.	The passenger is upset or angry. Could be due to an incident or delay.

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IT'S UP TO YOU...

- Make your own job easier by:
 - Staying in the Green Zone
 - Going for Care (using problem solving methods)
 - Sharing ideas for improving customer service



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Disability Etiquette

Ensuring appropriate, caring communication



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Disability Etiquette

- Basic disability etiquette involves treating people with disabilities with respect.
- Use **people-first language**. Avoid referring to a caller's particular disability unless it is necessary. Always put the person first. For example, say "customer who uses a wheelchair" or "person who is blind."



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Disability Etiquette

- **Provide clear, organized instructions** for customers with cognitive disabilities (e.g., traumatic brain injury, Dementia, and neurological conditions). When providing instructions, break down steps into smaller segments.
- **Repeat and ask for verification.** Clarification is very important when speaking with a customer who has a speech impairment (or any customer). Ask for verification of their request.



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Scripts

Tools for Clear, Consistent Calls



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Scripts

- **Best Practices:**
 - Always say "please" and "thank you" when asking for information and receiving information from a client.
 - Do your best to resolve the client's request quickly and politely.
 - Always acknowledge their request and remain calm, polite, and understanding if they had a bad or challenging experience.



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Scripts

- **Greetings:**
 - Thank you for calling East Bay Paratransit, this is (Name).
- **Hold:**
 - May I place you on hold for a moment?
 - Thank you for holding.
- **Call Closings:**
 - Thank you for calling, have a great day!

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Effectively Managing Calls

Expectations of a Professional Call Center Agent

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Expectations of a Professional Call Center Agent

- **Think about your body language and verbal reactions.**
 - A relaxed, smiling person is more likely to have a calm, controlled voice and can speak freely. A caller is more likely to feel comfortable and less upset when staff is keeping the tone professional and positive.
- **Keep customer informed.**
 - Let your customer know what you are doing and how long it might take. You may need to explain that you need to speak with someone else to get an answer. Let the customer know approximately how long it will take.

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Expectations of a Professional Call Center Agent

- Always ask the customer if you can put them on hold.
 - It is polite to ask their permission before placing them on hold. Try to let them know how long they can expect to hold.
- Provide accurate information.
 - If you are unsure about a questions, or aren't confident of your answer, ask to put the call on hold and ask a colleague or manager.
- Avoid negative language.
 - Stay calm and use positive language. It will create a positive experience for you and the customer.
- Treat each caller as an individual.
 - You play an important role in helping customers feel valued and appreciated. Use the caller's name when answering their questions.

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Expectations of a Professional Call Center Agent

- **Take detailed notes if you're handling a question or complaint.**
- **Reassure the customer.**
 - Let the customer know you're listening and value their feedback when handling a concern or complaint.
- **Don't over promise.**
 - If the customer is requesting a response, let them know you will take their complaint/questions, and someone will respond.
- **Know the business.**
 - Ensure you are up to date about information including operational practices, areas of service, ADA policies, and hours of operation.

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Expectations of a Professional Call Center Agent

- **Know how to apologize.**
 - The caller may not always be right, but kindness toward the situation will help the call reach its conclusion or help you and the caller find a solution to the issue or request.
- **Abuse is never acceptable.**
 - Professionally set limits with customers who are verbally abusive and remain calm.
- **Ensure the reservation details are correct before closing the call.**
 - Repeat the information to the customer to ensure all details – times, pick-up locations, and drop-off locations.

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Call Examples

Example 1

- What could the agent have done for a different outcome?
- What are some of the techniques you could apply to better support the customer?

Example 2

- What did the agent do well?
- How did this experience impact the client?



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Call Center Exercises

Agent/Customer Conversations

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Scenarios – Role Play Exercise

Scenario 1

- Rider calls in and is upset because the bus is not there at the scheduled time, and they'll be late to their appointment.
 - Your goal is to calm the rider down, explain where the vehicle is currently, and provide an estimated pick-up time.

Scenario 2

- Rider calls to complain about the bus leaving before they are ready – they need help to get home.
 - Apologize to the rider (even though it isn't our fault) and work with dispatch to arrange for a pick-up.
 - Work with the rider to determine what may have happened (options: didn't understand the rules, was having trouble getting to the pick-up location, delayed at the appointment).

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Scenarios – Role Play Exercise

Scenario 3

- Driver calls to let you know that the other agency's vehicle has not arrived yet and they've been waiting for 30 minutes. The passenger is very upset.
 - Your goal is to support the driver in getting the passenger to yellow, find out where the other vehicle is (or if it's even coming), provide an estimated pick-up time and let the rider know that if the other agency does not show up, we'll take them back to their pick-up location.

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Role Play Exercise Questions

- What was good or bad about the interaction?
- How could the interaction have gone better?
- Did you have all the information you needed to help the caller?
- What state (Green-Yellow-Red) was the caller in when they called?
- What state was the caller in when the call ended?
- Do you have any other thoughts or comments about this interaction?

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Thank you!



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Metric	FY 2022	FY 2023	% Change	YTD FY 2024
On-Time performance				
Early/On-Time	97.8%	96.9%	-0.9%	96.5%
1-20 Mins Late	2.0%	2.7%	35.0%	2.9%
21-59 Mins Late	0.2%	0.4%	100.0%	0.5%
60+ Mins Late	0.00%	0.01%	203.0%	0.03%
Scheduling				
Trips Scheduled	434,675	570,189	31%	533,550
Denials	61	479	685%	242
Denials as a % of rides scheduled	0.01%	0.08%	499%	0.05%
Rider Fault N/S & Late Cancel	14,308	16,065	12%	12,373
Rider Fault N/S as a % of rides scheduled	3.3%	2.8%	-14%	2.3%
Failed Pick Ups	15,244	18,476	21%	16,588
Failed Pick-ups as a % of rides scheduled	3.5%	3.2%	-8%	3.1%
Cancellations Overall	93,374	112,443	20%	102,312
Cancellations as a % of rides scheduled	21.5%	19.7%	-8%	19.2%
Call Center				
Dropped Calls	1.9%	1.8%	-5.3%	2.1%
Avg Calls per Hour	71	94	32.4%	101
Avg Queue Wait time	1:48	1:42	-5.6%	1:42
Complaints				
Timeliness	183	264	44%	231
Driver	417	458	10%	452
Vehicle	6	17	183%	12
Scheduling	57	79	39%	13
Broker	166	248	49%	245
Total	829	1066	29%	953
Complaints as a % of Revenue Passengers	0.32%	0.33%	3.13%	0.38%

% Change2

-0.4%
7.4%
25.0%
200.0%
-6.4%
-49.5%
-46.0%
-23.0%
-17.7%
-10.2%
-4.1%
-9.0%
-2.8%
16.7%
7.4%
0.0%
-12.5%
-1.3%
-29.4%
-83.5%
-1.2%
-10.6%
15.2%

EAST BAY PARATRANSIT
Performance Report for the EBPAAC
Systemwide

	FY 22/23	FY 23/24	
Ridership Statistics	Q3	Q3	
Total Passengers	102,192	119,427	
ADA Passengers	91,130	106,231	
% Companions	0.80%	0.9%	
% of Personal Care Assistants	10%	10%	
Average Passengers/ Weekday	1,441	1,676	
Average Pass/ Weekend & Holidays	490	535	

Scheduling Statistics

% Rider Fault No Shows & Late Cancels	2.80%	2.1%	
% of Cancellations	20.30%	19.5%	
Go Backs/ Re-scheduled	1,477	1,339	

Effectiveness Indicators

Revenue Hours	81,769	90,691	
Passengers/Revenue Vehicle Hour	1.25	1.32	
ADA Passengers per RVHr.	1.11	1.17	
Average Trip Length (miles)	12.20	11.77	
Average Ride Duration (minutes)	53.8	51.2	
Total Cost	\$11,025,591	\$13,565,854	
Total Cost per Passenger	\$107.89	\$113.59	
Total Cost per ADA Passenger	\$120.99	\$127.70	

On Time Performance

Percent on-time	96.9%	96.0%	
Percent 1-20 minutes past window	2.72%	3.18%	
% of trips 21-59 minutes past window	0.40%	0.70%	
% of trips 60 minutes past window	0.03%	0.04%	

Customer Service

Total Complaints	274	430	
Timeliness	74	99	
Driver Complaints	125	198	
Equipment / Vehicle	1	5	
Scheduling and Other Provider Complaints	17	41	
Broker Complaints	57	87	
Commendations	118	213	
Avg. wait time in Queue for reservation (min)	1.70	1.70	

Safety & Maintenance

Total accidents per 100,000 miles	3.90	3.13	
Roadcalls per 100,000 miles	2.80	2.78	

Eligibility Statistics

Total ADA Riders on Data Base	9,929	11,211	
Total Certification Determinations	863	746	
Initial Denials	3	6	
Denials Reversed	-	-	

Variance
16.9%
16.6%
12.5%
1.0%
16.3%
9.2%

-25.0%
-3.9%
-9.3%

10.9%
5.4%
5.1%
-3.5%
-4.8%
23.0%
5.3%
5.5%

-0.9%
16.9%
75.0%
-

56.9%
33.8%
58.4%
-
141.2%
52.6%
80.5%
0.0%

-19.7%
-0.7%

12.9%
-13.6%
100.0%
0.0%



Measure J Countywide Transportation for
Seniors and People with Disabilities
Program (Program 15) FY 2024-25

1 CLAIMANT INFORMATION

Date 6/18/2024

Agency	East Bay Paratransit Consortium (AC Transit / BART)	
Contact Person	Mallory Nestor-Brush	Ryan Greene-Roesel
Address	AC Transit Accessible Services	BART Accessible Services
	1600 Franklin Street	2150 Webster Street, 8th Floor
	Oakland, CA 94618	Oakland, CA 94612
Telephone No.	510-891-7213	510-287-4797
Email	mnestor@actransit.org	rgreene@bart.gov

FOR INTERNAL USE ONLY

Received:

Revised Submission:

Modifications Requested:

Subcommittee Reviewed:

3. PROJECT WORKSHEETS

A1 Measure J Claim Summary:	ALL CLAIMANTS
B. Capital Needs Forecast:	CLAIMANTS WHO USE MEASURE J FOR CAPITAL PURCHASES
C. Performance Indicators:	ALL CLAIMANTS
D. Rolling Stock Inventory:	ALL CLAIMANTS THAT OPERATE SERVICE USING MEASURE J
FUNDS	

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2024-25

Table A - Measure J Claim Summary TRANSIT

	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate
Program Sources (Revenues)			
	100% allocation		100% allocation
Measure J Prog 15	\$ 306,587	\$ 342,687	\$ 368,488
Measure J Prog 20	\$ 141,145	\$ 150,332	\$ 156,713
Measure J local reserves	\$ -	\$ -	\$ -
Measure J Interest			
Fares from Paratransit Service	\$ 1,628,822	\$ 1,838,349	\$ 2,120,999
TDA			
STA			
FTA			
Other -AlaCOunty MeasBB - AC Trans	\$ 17,083,694	\$ 17,171,352	\$ 17,534,880
Other - AlaCounty Meas BB - BART	\$ 5,694,565	\$ 5,723,784	\$ 5,844,960
Other - AC Transit General Funds	\$ 10,410,588	\$ 19,576,840	\$ 34,658,265
Other - BART General Funds	\$ 6,701,992	\$ 10,848,230	\$ 17,604,134
Total Other	\$ 39,890,839	\$ 53,320,206	\$ 75,642,239
TOTAL PROGRAM SOURCES	\$ 41,967,393	\$ 55,651,574	\$ 78,288,439
Program Uses (Expenditures)			
Administration	\$ 420,949	\$ 323,009	\$ 370,735
Paratransit Operations	\$ 39,102,457	\$ 52,912,535	\$ 75,567,401
Other - Outreach / Education	\$ 2,443,987	\$ 2,416,030	\$ 2,350,303
Other -			
TOTAL PROGRAM USES	\$ 41,967,393	\$ 55,651,574	\$ 78,288,439
Capital Expenditures			
NET OPERATING BALANCE	\$ -	\$ -	\$ -
Measure J Funds: Changes in Reserve Balance			
Beginning Reserve Balance		\$ -	\$ -
Annual Revenue	\$ 41,967,393	\$ 55,651,574	\$ 78,288,439
Annual Operating Expenditures	\$ 41,967,393	\$ 55,651,574	\$ 78,288,439
Annual Capital Expenditures	\$ -	\$ -	\$ -
Ending Reserve Balance	\$ -	\$ -	\$ -

Measure J Countywide Transportation for Seniors and People
with Disabilities Program (Program 15) FY 2024-25

Table B - Capital Needs and Acquisition Forecast

Anticipated Purchases	FY 2022 Actual	FY 2023 Projected	FY 2024 Estimate	FY 2025 Estimated
1				
2				
3				
4				
5				
TOTAL	\$ -	\$ -	\$ -	\$ -

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2024-25

Table C - Performance Indicators TRANSIT

Activity	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate
PARATRANSIT or DIAL-A-RIDE OPERATION			
Total Registered Clients	13,496	11,448	11,791
Total Passenger Trips	370,032	478,282	492,630
Total Revenue Service Hours (RSHr)	322,042	368,649	379,708
Pass Trips per RSHr	1.15	1.30	1.30
Average Passenger Trip Distance	11.9	11.8	11.8
Number of Wheelchair Passengers	93,797	107,477	110,701
Number of No-Shows	16,065	14,847	15,292
Number of Cancellations	112,443	122,774	126,457
Number of Trip Denials	479	290	299
Number of Multi-Agency Trips	8724	12,497	12,872
Number of Accidents	175	169	174
Percent of On-Time Performance	96.90%	96.20%	96.20%

see directions (and glossary) for the definitions of the above terms and the appropriate formulas

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2023-24

Table D - Rolling Stock Inventory

Vehicle Fleet								Funding Source(s)	Anticipated Replacement Year
Make	Model	Type of Vehicle(s) (specify bus, large van, minivan, sedan)	Year of Vehicle	Fuel Type	Number of Vehicles	Owner (specify if contractor)	Anticipated Replacement Year		
Ford	E-350	Cutaway	2016	Gasoline	9	First Transit	2024		
Ford	E-350	Cutaway	2017	Gasoline	4	First Transit	2024		
Ford	E-350	Cutaway	2018	Gasoline	7	First Transit	2025		
Ford	E-350	Cutaway	2019	Gasoline	34	First Transit	2026		
Ford	E-350	Cutaway	2020	Gasoline	11	First Transit	2027		
Ford	F-450	Cutaway	2015	Gasoline	1	MV	2024		
Ford	F-450	Cutaway	2016	Gasoline	1	MV	2024		
Ford	F-450	Cutaway	2017	Gasoline	16	MV	2024		
Ford	F-450	Cutaway	2018	Gasoline	12	MV	2025		
Ford	F-450	Cutaway	2019	Gasoline	18	MV	2026		
Ford	F-450	Cutaway	2014	Gasoline	24	RydeTrans	2024		
Ford	F-450	Cutaway	2019	Gasoline	26	RydeTrans	2026		
Ford	F-450	Cutaway	2020	Gasoline	4	RydeTrans	2027		
TOTALS					167				



**East Bay Paratransit
Operations Report
April 2024**



Ridership, Productivity, Key Indicators

Total Systemwide passengers transported in April were 41,967 bringing Total Passengers for FY 23-24 to 398,569 or 17.7% more than budgeted. (p5). At the same time, TBH's are over budget by 22.1% (p5). Trips performed in April were 37,062 and YTD were 353,570. Passengers per weekday averaged 1,686 in April and passengers per weekend/holiday were 610. YTD those figures are 1,633 and 597. Deadhead in April was 13.4% and YTD 13.7%.

Overall on-time performance in April was 95.6%, with trips greater than 60 minutes late at 0.02%; year-to-date figures are 96.5% and 0.03% respectively. Overall productivity in April was 1.34 and ADA productivity amounted to 1.18. YTD figures for productivity are 1.30 and 1.15 (p3). YTD Denials as a percentage of trips scheduled averaged 0.05% (p9). Denials in April were 12 and YTD were 243; 79 capacity denials, 155 scheduled denials, and 5 refused ADA compliant trips. Rider fault no-shows in April were 1.4% and 2.3% YTD. Cancellations for the month were 18.7% and 19.2% YTD (p3). Taxi trips averaged 18.0% of trips delivered YTD. Taxi costs amounted to \$5,762,556 (p10).

Complaints (p3) as a percentage of revenue passengers were 0.45% in April. The Fiscal Year average is 0.38%. Dropped calls for the month were 2.9% with 2.1% for the year. April wait time in queue was 1:51 minutes against the standard of < 2:00 (p3). Total accidents in April were 18; in the Fiscal Year 141.

Incentives/ Disincentives

The Broker was paid an incentive of \$10,000 in March; \$10,000 was for an on-time performance rate of 95% or better.

ADA Expenses / Budget-to-Actual

Total ADA Program expenses year-to-date are \$46.1M. YTD AC Transit's share of costs are \$31.7M and they are under budget -\$0.6M. BART's share of costs are \$14.4M which puts them over budget by \$1.4M.

FY 2023-2024 EAST BAY PARATRANSIT

Monthly Performance Indicator Report - Systemwide
(incl. service outside coord service area of EBP)

	July	August	September	October	November	December	January	February	March	April	May	June	FY 2023-24
Ridership													
Total Passengers (Pass.)	37,479	41,232	40,206	42,616	38,639	37,003	38,731	39,133	41,563	41,967			398,569
Revenue Pass.	28,006	30,834	30,315	31,765	29,002	27,691	29,092	29,401	31,021	31,184			298,311
Non-Revenue Pass.	9,473	10,398	9,891	10,851	9,637	9,312	9,639	9,732	10,542	10,783			100,258
ADA Pass.	32,953	36,412	35,671	37,944	34,483	32,850	34,604	34,796	36,831	37,026			353,570
Non Revenue ADA Pass	5,214	5,866	5,627	6,483	5,761	5,475	5,774	5,669	6,085	6,122			58,076
Personal Care Assistants - PCA's	4,164	4,414	4,176	4,252	3,776	3,748	3,757	3,979	4,349	4,550			41,165
% PCA's	11%	11%	10%	10%	10%	10%	10%	10%	10%	11%			10.3%
Companions	362	406	359	420	380	405	370	358	383	391			3,834
Non Revenue companions	95	118	88	116	100	89	108	84	108	111			917
% Companions	1.0%	1.0%	0.9%	1.0%	1.0%	1.1%	1.0%	0.9%	0.9%	0.9%			1.0%
Ave. Pass/ Weekday	1555	1573	1694	1687	1677	1437	1593	1748	1687	1686			1,633
Ave. Pass/ Weekend and Holidays	579	633	633	611	616	682	528	464	613	610			597
Week Days	20	23	20	22	19	21	21	20	21	22			209
Weekend days and Holidays	11	8	10	9	11	10	10	9	10	8			96
Weekday Pass.	31,105	36,171	33,880	37,118	31,863	30,184	33,453	34,954	35,434	37,084			341,246
Weekend and Holiday Pass.	6,374	5,061	6,326	5,498	6,776	6,819	5,278	4,179	6,129	4,883			57,323

Hours and Miles													
Revenue Hours (RHR.)	29,395	32,362	30,367	32,429	30,373	30,259	30,708	29,089	30,894	31,330			307,208
Non Revenue Hours	4,664	5,165	4,855	5,219	4,801	4,899	5,010	4,502	4,746	4,835			48,698
Total Billable Hrs.	34,059	37,528	35,223	37,649	35,175	35,159	35,718	33,591	35,640	36,165			355,906
Deadhead %	13.7%	13.8%	13.8%	13.9%	13.6%	13.9%	14.0%	13.4%	13.3%	13.4%			13.7%
Revenue Miles (RM)	397,475	435,647	415,849	440,402	408,582	393,741	408,769	407,401	434,020	438,515			4,180,401
Non Revenue Miles	87,809	96,772	90,426	96,228	89,297	90,061	93,332	85,000	89,254	91,105			909,284
Revenue Miles per ADA Pass.	12.06	11.96	11.66	11.61	11.85	11.99	11.81	11.71	11.78	11.84			11.82
Total Miles	485,284	532,419	506,275	536,629	497,880	483,801	502,101	492,401	523,273	529,620			5,089,685

Financial Data													
Service Provider Cost	\$3,622,901	\$3,988,331	\$3,747,587	\$3,988,093	\$3,722,588	\$3,716,620	\$3,786,429	\$3,575,707	\$3,788,563	\$3,843,395			\$37,780,214
Service Provider Fuel	\$252,824	\$293,989	\$304,063	\$273,870	\$233,357	\$224,223	\$220,321	\$218,530	\$267,117	\$288,002			\$2,576,296
Less Liquidated Damages	(\$59,500)	(\$20,700)	(\$40,500)	(\$30,600)	(\$31,900)	(\$28,800)	(\$30,600)	(\$15,200)	(\$42,400)	(\$12,500)			(\$312,700)
Less Muni Reimbursement	(\$17,833)	(\$21,295)	(\$21,338)	(\$23,250)	(\$21,194)	(\$18,003)	(\$23,137)	(\$21,736)	(\$24,534)	(\$24,459)			(\$216,780)
Broker Cost	\$555,741	\$594,279	\$718,250	\$569,485	\$574,056	\$776,252	\$540,271	\$600,179	\$597,066	\$593,707			\$6,119,285
Incentives/Disincentives	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000			\$100,000
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
EBP Survey	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Globe tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Verizon Cost	\$13,970	\$14,026	\$14,035	\$14,041	\$14,205	\$14,269	\$14,166	\$14,329	\$14,123	\$14,218			\$141,381
CTS Language Link	\$32	\$165	\$136	\$83	\$109	\$56	\$139	\$107	\$164	\$125			\$1,115
Program Manager Cost	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750			\$187,500
Total Cost	\$4,396,884	\$4,877,546	\$4,750,982	\$4,820,471	\$4,519,971	\$4,713,368	\$4,536,338	\$4,400,667	\$4,628,849	\$4,731,237			\$46,376,312
Fares	(\$146,167)	(\$137,045)	(\$157,613)	(\$167,007)	(\$152,706)	(\$145,175)	(\$152,278)	(\$154,108)	(\$163,971)	(\$164,856)			(\$1,540,924)
Net Cost	\$4,250,717	\$4,740,501	\$4,593,370	\$4,653,464	\$4,367,264	\$4,568,193	\$4,384,061	\$4,246,559	\$4,464,878	\$4,566,381			\$44,835,388
Special Programs during shelter-in-place	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Avg. SP Rate per TBHrs.	\$106.37	\$106.28	\$106.40	\$105.93	\$105.83	\$105.71	\$106.01	\$106.45	\$106.30	\$106.27			\$106.15
Total Cost/Passenger	\$117.32	\$118.30	\$118.17	\$113.11	\$116.98	\$127.38	\$117.12	\$112.45	\$111.37	\$112.74			\$116.36
Total Cost/ ADA Passenger (trip)	\$133.43	\$133.95	\$133.19	\$127.04	\$131.08	\$143.48	\$131.09	\$126.47	\$125.68	\$127.78			\$131.17
Subsidy/Passenger	\$113.42	\$114.97	\$114.25	\$109.20	\$113.03	\$123.45	\$113.19	\$108.52	\$107.42	\$108.81			\$112.49

(1) During the shelter-in-place order, EBPC performed service for Meals on Wheels plus the Ala. County Sheriff's and Oakland Housing's meal programs.

	July	August	September	October	November	December	January	February	March	April	May	June	FY 2023-24
On-Time Performance													
On Time (w/in the window)													
Standard = > 91%	98.24%	96.97%	96.74%	96.20%	96.5%	96.9%	96.9%	95.6%	95.6%	95.6%			96.5%
1 - 20 minutes late	1.59%	2.66%	2.84%	3.34%	3.05%	2.6%	2.67%	3.19%	3.67%	3.69%			2.9%
21 - 59 minutes late	0.16%	0.35%	0.40%	0.41%	0.43%	0.5%	0.41%	0.94%	0.75%	0.71%			0.5%

60 or more minutes late														
Standard = < 0.2%	0.01%	0.02%	0.01%	0.04%	0.03%	0.02%	0.02%	0.07%	0.02%	0.02%				0.03%
Missed Trips	32	49	41	52	62	59	58	88	112	88				641
Missed Trips as a % of ADA pax	0.10%	0.13%	0.11%	0.14%	0.18%	0.18%	0.17%	0.25%	0.30%	0.24%				0.18%

Scheduling														
Total Pass per RVHr	1.28	1.27	1.32	1.31	1.27	1.22	1.26	1.35	1.35	1.34				1.30
ADA Pass per RVHr Standard = > 1.50	1.12	1.13	1.17	1.17	1.14	1.09	1.13	1.20	1.19	1.18				1.15
Denials (sched, capacity, and refused)	57	59	51	16	12	7	7	8	14	11				242
Denials as a % of rides scheduled	0.12%	0.11%	0.10%	0.03%	0.02%	0.01%	0.01%	0.02%	0.03%	0.02%				0.05%
Rider Fault N/S & Late Cancels	1,318	1,480	1,426	1,389	1,248	1,345	1,270	1,121	1,016	760				12,373
Rider N/S & Late Cancels as a % of rides scheduled	2.7%	2.7%	2.7%	2.5%	2.4%	2.6%	2.4%	2.1%	1.8%	1.4%				2.3%
Failed Pick Ups (all no shows)	1,518	1,765	1,615	1,689	1,685	1,827	1,789	1,666	1,592	1,442				16,588
Failed Pick Ups as a % of rides scheduled	3.1%	3.2%	3.0%	3.0%	3.2%	3.6%	3.4%	3.2%	2.8%	2.6%				3.1%
Cancellations Overall	8,990	10,448	9,743	10,515	9,976	10,907	10,604	10,155	10,571	10,403				102,312
Cancellations Overall as a % of rides scheduled	18.3%	19.1%	18.4%	18.6%	19.2%	21.2%	20.2%	19.3%	18.9%	18.7%				19.2%
Trips scheduled	49,232	54,632	53,017	56,530	51,968	51,406	52,570	52,675	55,892	55,628				533,550
Go Backs/ Re-scheduled	470	570	556	532	507	406	415	416	508	457				4,837
Ave. Trip Length (RM/ADA Pass)	12.1	12.0	11.7	11.6	11.8	12.0	11.8	11.7	11.8	11.8				11.8
Ave Trip Duration (in min. RH/ADA pass*60)	53.5	53.3	51.1	51.3	52.8	55.3	53.2	50.2	50.3	50.8				52.1

Complaints and Commendations														
PROVIDER Timeliness	9	32	24	18	20	28	29	33	37	28				258
Driver Complaints	19	63	38	40	53	38	67	64	67	82				531
Equipment / Vehicle	1	2	2	2	0	0	0	2	3	3				15
Scheduling	1	1	4	1	0	1	4	5	6	2				25
Other - Provider	3	8	4	6	4	2	9	15	2	3				56
BROKER Scheduling	0	0	0	0	0	0	0	0	1	0				1
Phone/Reservations	5	10	9	12	11	19	12	6	8	8				100
Broker Dispatch	2	16	6	13	10	3	11	13	20	10				104
Other	3	9	0	2	1	5	2	11	3	4				40
Total Complaints	43	141	87	94	99	96	134	149	147	140				1,130
Commendations	21	55	31	46	54	16	67	74	72	75				511
Complaints as % of Rev. Pass	0.15%	0.46%	0.29%	0.30%	0.34%	0.35%	0.46%	0.51%	0.47%	0.45%				0.38%
Commendations as % of Rev Pass	0.07%	0.18%	0.10%	0.14%	0.19%	0.06%	0.23%	0.25%	0.23%	0.24%				0.17%

Call Center														
Dropped calls Standard = < 5%	1.9%	2.1%	1.8%	2.1%	2.0%	2.1%	1.7%	2.2%	2.5%	2.9%				2.1%
Average calls per hour	94	104	108	105	104	92	96	103	101	101				101
Ave wait in queue for reservation (min - Time)	1:37	1:43	1:34	1:43	1:40	1:42	1:38	1:48	1:47	1:51				1:42
standard = < 2 minutes														

Safety and Maintenance	July	August	September	October	November	December	January	February	March	April	May	June	FY 2023-24
Major Accident (> \$25,000 prop dam., +/- 2 persons requiring immediate med attention, +/- a fatality)	0	0	0	1	0	0	0	0	0	0			1
Non-Major Accident (\$7,500 - \$24,999 property damage +/- 1 person needing immediate med attention)	1	0	0	2	2	0	0	7	0	0			12
Other Accidents (<\$7,500 physical damage)	12	17	12	17	8	12	14	7	11	18			128
Total Accidents	13	17	12	20	10	12	14	14	11	18			141
Total accidents/ 100,000 RVMiles	3.3	3.9	2.9	4.5	2.4	3.0	3.4	3.4	2.5	4.1			3.4
Roadcalls for Mechanical Failure	12	21	16	15	4	20	11	20	18	19			156
Miles Between Roadcalls	40,440	25,353	31,642	35,775	124,470	24,190	45,646	24,620	29,071	27,875			32,626
Roadcalls/ 100,000 Total Miles - Standard < 4.0	2.5	3.9	3.2	2.8	0.8	4.1	2.2	4.1	3.4	3.6			3.1

CERTIFICATION	July	August	September	October	November	December	January	February	March	April	May	June	Total
Applications Received													
New	152	186	179	183	159	166	215	196	209	163			1,808
Re-certification	125	135	91	85	109	114	129	99	103	126			1,116
Total	277	321	270	268	268	280	344	295	312	289			2,924
Requests for In Person Interviews													
New	208	261	201	209	196	203	239	244	201	209			2,171
Re-certification	21	23	19	31	16	24	18	29	19	20			220
Total	229	284	220	240	212	227	257	273	220	229			2,391
In person interviews completed													
New	141	188	152	151	129	129	164	167	152	156			1,529
Re-certification	16	16	16	16	12	15	12	24	14	15			156
Total	157	204	168	167	141	144	176	191	166	171			1,685
Complete Applications w/out a determination in 21 days	0	0	0	0	0	0	0	0	0	4			4
Certification Determinations Completed													
Conditional Eligibility													
New	50	45	59	54	36	33	42	48	29	40			436
Recertifications	41	46	40	35	34	44	49	41	37	37			404
Total	91	91	99	89	70	77	91	89	66	77			840
Initial Denials													
New	2	2	1	2	3	2	1	4	1	1			19
Recertifications	0	0	0	0	0	0	0	0	0	0			0
Total	2	2	1	2	3	2	1	4	1	1			19
Full Eligibility													
New	67	101	69	85	71	59	95	87	65	91			790
Recertifications	56	90	51	34	52	81	70	51	40	64			589
Total	123	191	120	119	123	140	165	138	105	155			1,379
Temporary Eligibility													
New	11	21	13	24	12	28	20	24	36	19			208
Recertifications	1	0	4	2	2	1	1	2	3	2			18
Total	12	21	17	26	14	29	21	26	39	21			226
Total of Certification Determinations													
New	130	169	142	165	122	122	158	163	131	151			1,453
Recertifications	98	136	95	71	88	126	120	94	80	103			1,011
Grand Total	228	305	237	236	210	248	278	257	211	254			2,464
Denials Reversed	0	0	0	0	0	0	0	0	0	1			1
Appeals Received	0	0	1	0	0	1	0	0	1	0			3
Appeals Forwarded to Committee	0	0	1	0	0	1	0	0	1	0			3
ADA Riders on Data Base	10,144	10,323	10,470	10,605	10,777	10,842	11,027	11,092	11,211	11,318			11,318

**East Bay Paratransit
FY 2023-24 Budget to Actual**

BUDGET

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	March	Apr	May	June	Y-T-D Budget	Total FY 23-24 Budget
Passengers	27,540	37,277	31,337	32,339	38,237	41,546	32,300	31,994	33,045	32,890	33,760	46,497	338,505	418,762
Productivity	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30	1.30
Total Billable Hours	23,708	32,090	26,977	27,840	32,917	35,766	27,806	27,543	28,447	28,314	29,063	40,029	291,408	360,500
Revenue Hours	21,153	28,631	24,069	24,839	29,369	31,910	24,809	24,574	25,381	25,262	25,930	35,713	259,997	321,638

ACTUAL

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	March	Apr	May	June	Actual	YTD Budget	btw.
Passengers	37,479	41,232	40,206	42,616	38,639	37,003	38,731	39,133	41,563	41,967			398,569	60,064	17.7%
Productivity	1.27	1.27	1.32	1.31	1.27	1.22	1.26	1.35	1.35	1.34			1.30	0.00	-0.4%
Total Billable Hours	34,059	37,528	35,223	37,649	35,175	35,159	35,718	33,591	35,640	36,165			355,906	64,498	22.1%
Revenue Hours	29,395	32,362	30,367	32,429	30,373	30,259	30,708	29,089	30,894	31,330			307,208	47,211	18.2%

EBP Total Budget FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	Year-to-date
Service Providers	\$3,135,945	\$3,920,025	\$3,135,945	\$3,527,985	\$3,920,025	\$4,312,065	\$3,527,985	\$3,527,985	\$3,527,985	\$3,527,985	\$3,527,985	\$4,312,068	\$36,063,932
Fuel	\$200,110	\$250,143	\$200,110	\$225,126	\$250,143	\$275,160	\$225,126	\$225,126	\$225,126	\$225,126	\$225,126	\$275,161	\$2,301,297
LD's	-\$32,910	-\$41,139	-\$32,910	-\$37,025	-\$41,139	-\$45,253	-\$37,025	-\$37,025	-\$37,025	-\$37,025	-\$37,025	-\$45,251	-\$378,475
Less Muni Trip reimbursement	-\$15,920	-\$19,900	-\$15,920	-\$17,910	-\$19,900	-\$21,891	-\$17,910	-\$17,910	-\$17,910	-\$17,910	-\$17,910	-\$21,892	-\$183,083
Adj. Service Providers w/ fuel	\$3,287,225	\$4,109,128	\$3,287,225	\$3,698,177	\$4,109,128	\$4,520,080	\$3,698,177	\$3,698,177	\$3,698,177	\$3,698,177	\$3,698,177	\$4,520,084	\$37,803,671
Broker	\$559,099	\$698,890	\$559,099	\$628,994	\$698,890	\$768,786	\$628,994	\$628,994	\$628,994	\$628,994	\$628,994	\$768,792	\$6,429,735
Verizon Cost	\$20,933	\$26,168	\$20,933	\$23,551	\$26,168	\$28,784	\$23,551	\$23,551	\$23,551	\$23,551	\$23,551	\$28,783	\$240,740
CTS Language Link	\$82	\$103	\$82	\$93	\$103	\$113	\$93	\$93	\$93	\$93	\$93	\$109	\$946
Broker Incentives	\$19,400	\$24,251	\$19,400	\$21,826	\$24,251	\$26,676	\$21,826	\$21,826	\$21,826	\$21,826	\$21,826	\$26,674	\$223,107
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Survey - 2024	\$2,853	\$3,567	\$2,853	\$3,210	\$3,567	\$3,923	\$3,210	\$3,210	\$3,210	\$3,210	\$3,210	\$3,919	\$32,813
Globe tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Broker paid costs	\$602,368	\$752,978	\$602,368	\$677,673	\$752,978	\$828,282	\$677,673	\$677,673	\$677,673	\$677,673	\$677,673	\$828,277	\$6,927,341
Contactless Fare App	\$27,880	\$34,851	\$27,880	\$31,365	\$34,851	\$38,336	\$31,365	\$31,365	\$31,365	\$31,365	\$31,365	\$38,335	\$320,623
Budget Amount w/out PCO	\$3,917,472	\$4,896,957	\$3,917,472	\$4,407,216	\$4,896,957	\$5,386,697	\$4,407,216	\$4,407,216	\$4,407,216	\$4,407,216	\$4,407,216	\$5,386,696	\$45,051,635
EBP PCO	\$19,622	\$24,528	\$19,622	\$22,076	\$24,528	\$26,982	\$22,076	\$22,076	\$22,076	\$22,076	\$22,076	\$26,978	\$225,660
BART Planning Budget	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
BART Regional Trip Coordinator	\$5,943	\$7,429	\$5,943	\$6,686	\$7,429	\$8,172	\$6,686	\$6,686	\$6,686	\$6,686	\$6,686	\$8,172	\$68,343
Total EBP Budget w/PCO	\$3,943,037	\$4,928,914	\$3,943,037	\$4,435,977	\$4,928,914	\$5,421,850	\$4,435,977	\$4,435,977	\$4,435,977	\$4,435,977	\$4,435,977	\$5,421,846	\$45,345,637

EBP Actuals FY23/24

EBP Total Actuals FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	EBP YTD
Service Providers	\$3,622,901	\$3,988,331	\$3,747,587	\$3,988,093	\$3,722,588	\$3,716,620	\$3,786,429	\$3,022,169	\$3,788,563	\$3,843,395			\$37,226,676
Fuel	\$252,824	\$293,989	\$304,063	\$273,870	\$233,357	\$224,223	\$220,321	\$218,530	\$267,117	\$288,002			\$2,576,296
LD's	(\$59,500)	(\$20,700)	(\$40,500)	(\$30,600)	(\$31,900)	(\$28,800)	(\$30,600)	(\$15,200)	(\$42,400)	(\$12,500)			-\$312,700
Less Muni Trip reimbursement	(\$17,833)	(\$21,295)	(\$21,338)	(\$23,250)	(\$21,194)	(\$18,003)	(\$23,137)	(\$21,736)	(\$24,534)	(\$24,459)			-\$216,780
Adj. Service Provider with Fuel	\$3,798,391	\$4,240,325	\$3,989,811	\$4,208,113	\$3,902,850	\$3,894,041	\$3,953,014	\$3,203,763	\$3,988,746	\$4,094,438	\$0	\$0	\$39,273,492
Broker	\$555,741	\$594,279	\$718,250	\$569,485	\$574,056	\$776,252	\$540,271	\$600,179	\$597,066	\$593,707			\$6,119,285
Verizon Cost	\$13,970	\$14,026	\$14,035	\$14,041	\$14,205	\$14,269	\$14,166	\$14,329	\$14,123	\$14,218			\$141,381
CTS Language Link	\$32	\$165	\$136	\$83	\$109	\$56	\$139	\$107	\$169	\$125			\$1,116
Broker Incentives	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000			\$100,000
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Survey - 2024	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Globe tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Total Broker paid costs	\$579,743	\$618,471	\$742,421	\$593,608	\$598,370	\$800,577	\$564,575	\$624,615	\$621,353	\$618,049	\$0	\$0	\$6,361,782
Contactless Fare App	\$18,286	\$20,368	\$24,780	\$20,335	\$19,876	\$18,254	\$19,725	\$21,327	\$22,242	\$21,316			\$206,509
Total EBP Actuals w/out PCO	\$4,396,421	\$4,879,164	\$4,757,012	\$4,822,056	\$4,521,097	\$4,712,872	\$4,537,313	\$3,849,706	\$4,632,341	\$4,733,803	\$0	\$0	\$45,841,783
EBP PCO	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750	\$18,750			\$187,500
BART Planning Budget	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
BART Regional Trip Coordinator	\$7,136	\$7,078	\$6,919	\$8,265	\$7,137	\$10,344	\$7,137	\$6,510	\$5,891	\$6,997			\$73,412
Total EBP Actuals w/PCO	\$4,422,306	\$4,904,991	\$4,782,682	\$4,849,071	\$4,546,983	\$4,741,965	\$4,563,200	\$3,874,966	\$4,656,981	\$4,759,550	\$0	\$0	\$46,102,695
Special Program Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0			\$0
Total Costs w/Special Program Costs	\$4,422,306	\$4,904,991	\$4,782,682	\$4,849,071	\$4,546,983	\$4,741,965	\$4,563,200	\$3,874,966	\$4,656,981	\$4,759,550	\$0	\$0	\$46,102,695

EBP FY23/24 Budget-to-Actual - Operational Costs only	YTD Budget	YTD Actual	Over / under Budget	% Over/under Budget
Service Providers	\$36,063,932	\$37,226,676	\$1,162,744	3.2%
Fuel	\$2,301,297	\$2,576,296	\$274,999	11.9%
LD's	-\$378,475	-\$312,700	\$65,775	-17.4%
Less Muni Trip reimbursement	-\$183,083	-\$216,780	-\$33,697	18.4%
Adj. Service Providers with fuel	\$37,803,671	\$39,273,492	\$1,469,820	3.9%
Broker	\$6,429,735	\$6,119,285	-\$310,450	-4.8%
Verizon Cost	\$240,740	\$141,381	-\$99,359	-41.3%
CTS Language Link	\$946	\$1,116	\$170	17.9%
Broker Incentives	\$223,107	\$100,000	-\$123,107	-55.2%
Emergency Plan	\$0	\$0	\$0	0.0%
Survey - 2024	\$32,813	\$0	-\$32,813	-100.0%
Globe tickets	\$0	\$0	\$0	0.0%
Total Broker paid costs	\$6,927,341	\$6,361,782	-\$565,559	-8.2%
Contactless Fare App	\$320,623	\$206,509	-\$114,114	-35.6%
Total EBP w/out PCO	\$45,051,635	\$45,841,783	\$790,148	1.8%
EBP Prog.Coordinator	\$225,660	\$187,500	-\$38,160	-16.9%
BART Planning Budget	\$0	\$0	\$0	0.0%
BART Regional Trip Coordinator	\$390,323	\$206,509	-\$183,814	0.0%
Total EBP Budget w/PCO	\$45,345,637	\$46,102,695	\$757,058	1.7%

AC Transit Budget FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	Year-to-date	T. 23/24 budget
Service Providers	\$2,267,872	\$2,834,907	\$2,267,872	\$2,551,390	\$2,834,907	\$3,118,425	\$2,551,390	\$2,551,390	\$2,551,390	\$2,551,390	\$2,551,390	\$3,118,427	\$26,080,933	\$31,750,750
Fuel	\$131,433	\$164,295	\$131,433	\$147,864	\$164,295	\$180,726	\$147,864	\$147,864	\$147,864	\$147,864	\$147,864	\$180,727	\$1,511,502	\$1,840,093
LD's	-\$22,708	-\$28,386	-\$22,708	-\$25,547	-\$28,386	-\$31,225	-\$25,547	-\$25,547	-\$25,547	-\$25,547	-\$25,547	-\$31,223	-\$261,148	-\$317,918
Less Muni Trip reimbursement	-\$10,985	-\$13,731	-\$10,985	-\$12,358	-\$13,731	-\$15,105	-\$12,358	-\$12,358	-\$12,358	-\$12,358	-\$12,358	-\$15,106	-\$126,327	-\$153,791
Adj. Service Providers w/ fuel	\$2,365,612	\$2,957,085	\$2,365,612	\$2,661,349	\$2,957,085	\$3,252,821	\$2,661,349	\$2,661,349	\$2,661,349	\$2,661,349	\$2,661,349	\$3,252,825	\$27,204,960	\$33,119,134
Broker	\$385,778	\$482,234	\$385,778	\$434,006	\$482,234	\$530,462	\$434,006	\$434,006	\$434,006	\$434,006	\$434,006	\$530,468	\$4,436,516	\$5,400,990
Verizon Cost	\$14,444	\$18,056	\$14,444	\$16,250	\$18,056	\$19,861	\$16,250	\$16,250	\$16,250	\$16,250	\$16,250	\$19,860	\$166,111	\$202,221
CTS Language Link	\$57	\$71	\$57	\$64	\$71	\$78	\$64	\$64	\$64	\$64	\$64	\$74	\$654	\$792
Broker Incentives	\$13,386	\$16,733	\$13,386	\$15,060	\$16,733	\$18,406	\$15,060	\$15,060	\$15,060	\$15,060	\$15,060	\$18,404	\$153,944	\$187,408
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Survey - 2024	\$1,969	\$2,461	\$1,969	\$2,215	\$2,461	\$2,707	\$2,215	\$2,215	\$2,215	\$2,215	\$2,215	\$2,703	\$22,642	\$27,560
Globe Tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Broker paid costs	\$415,634	\$519,555	\$415,634	\$467,595	\$519,555	\$571,514	\$467,595	\$467,595	\$467,595	\$467,595	\$467,595	\$571,509	\$4,779,867	\$5,818,971
Contactless Fare App	\$19,237	\$24,047	\$19,237	\$21,642	\$24,047	\$26,452	\$21,642	\$21,642	\$21,642	\$21,642	\$21,642	\$26,451	\$221,230	\$269,323
Budget Amount w/out PCO	\$2,800,483	\$3,500,687	\$2,800,483	\$3,150,586	\$3,500,687	\$3,850,787	\$3,150,586	\$3,150,586	\$3,150,586	\$3,150,586	\$3,150,586	\$3,850,784	\$32,206,057	\$39,207,427
EBP PCO	\$9,811	\$12,264	\$9,811	\$11,038	\$12,264	\$13,491	\$11,038	\$11,038	\$11,038	\$11,038	\$11,038	\$13,488	\$112,831	\$137,357
Total AC Budget w/PCO	\$2,810,294	\$3,512,951	\$2,810,294	\$3,161,624	\$3,512,951	\$3,864,278	\$3,161,624	\$3,161,624	\$3,161,624	\$3,161,624	\$3,161,624	\$3,864,272	\$32,318,888	\$39,344,784

ACT Actuals FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	ACT YTD
Service Providers	\$2,499,802	\$2,751,949	\$2,585,835	\$2,751,784	\$2,568,586	\$2,564,468	\$2,612,636	\$2,085,297	\$2,614,108	\$2,651,942	\$0	\$0	\$25,686,406
Fuel	\$174,448	\$202,853	\$209,803	\$188,970	\$161,016	\$154,714	\$152,022	\$150,786	\$184,311	\$198,721	\$0	\$0	\$1,777,644
LD's	-\$41,055	-\$14,283	-\$27,945	-\$21,114	-\$22,011	-\$19,872	-\$21,114	-\$10,488	-\$29,256	-\$8,625	\$0	\$0	-\$215,763
Less Muni Trip reimbursement	-\$12,305	-\$14,694	-\$14,723	-\$16,043	-\$14,624	-\$12,422	-\$15,964	-\$14,998	-\$16,928	-\$16,877	\$0	\$0	-\$149,578
Adj. Service Providers with fuel	\$2,620,890	\$2,925,824	\$2,752,970	\$2,903,598	\$2,692,967	\$2,686,888	\$2,727,579	\$2,210,597	\$2,752,235	\$2,825,162	\$0	\$0	\$27,098,709
Broker	\$383,461	\$410,053	\$495,592	\$392,945	\$396,098	\$535,614	\$372,787	\$414,124	\$411,976	\$409,657	\$0	\$0	\$4,222,307
Verizon Cost	\$9,639	\$9,678	\$9,684	\$9,688	\$9,802	\$9,846	\$9,774	\$9,887	\$9,745	\$9,811	\$0	\$0	\$97,553
CTS Language Link	\$22	\$14	\$94	\$57	\$75	\$39	\$96	\$74	\$113	\$86	\$0	\$0	\$770
Broker Incentives	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$6,900	\$0	\$0	\$69,000
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Survey - 2024	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Globe tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Broker paid costs	\$400,023	\$426,745	\$512,271	\$409,590	\$412,875	\$552,398	\$389,557	\$430,985	\$428,733	\$426,454	\$0	\$0	\$4,389,630
Contactless Fare App	\$12,617	\$14,054	\$17,098	\$14,031	\$13,714	\$12,595	\$13,610	\$14,716	\$15,347	\$14,708	\$0	\$0	\$142,491
Total AC Transit Actuals w/out PCO	\$3,033,530	\$3,366,623	\$3,282,338	\$3,327,219	\$3,119,557	\$3,251,881	\$3,130,746	\$2,656,297	\$3,196,315	\$3,266,324	\$0	\$0	\$31,630,830
EBP PCO	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$0	\$0	\$93,750
Total AC Transit Actuals w/PCO	\$3,042,905	\$3,375,998	\$3,291,713	\$3,336,594	\$3,128,932	\$3,261,256	\$3,140,121	\$2,665,672	\$3,205,690	\$3,275,699	\$0	\$0	\$31,724,580
Special Program Costs	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total AC Costs w/Special Program Costs	\$3,042,905	\$3,375,998	\$3,291,713	\$3,336,594	\$3,128,932	\$3,261,256	\$3,140,121	\$2,665,672	\$3,205,690	\$3,275,699	\$0	\$0	\$31,724,580

ACT FY23/24 Budget-to-Actual	YTD Budget	YTD Actual	Amount over / under Budget	% Over/under Budget
Service Providers	\$26,080,933	\$25,686,406	-\$394,527	-1.5%
Fuel	\$1,511,502	\$1,777,644	\$266,142	17.6%
LD's	-\$261,148	-\$215,763	\$45,385	-17.4%
Less Muni Trip reimbursement	-\$126,327	-\$149,578	-\$23,251	18.4%
Adj. Service Providers with fuel	\$27,204,960	\$27,098,709	-\$106,251	-0.4%
Broker	\$4,436,516	\$4,222,307	-\$214,209	-4.8%
Verizon Cost	\$166,111	\$97,553	-\$68,558	-41.3%
CTS Language Link	\$654	\$770	\$116	17.7%
Broker Incentives	\$153,944	\$69,000	-\$84,944	-55.2%
Emergency Plan	\$0	\$0	\$0	0.0%
Survey - 2024	\$22,642	\$0	-\$22,642	-100.0%
Globe tickets	\$0	\$0	\$0	0.0%
Total Broker paid costs	\$4,779,867	\$4,389,630	-\$390,237	-8.2%
Contactless Fare App	\$221,230	\$142,491	-\$78,739	-35.6%
Total AC Transit w/out PCO	\$32,206,057	\$31,630,830	-\$575,227	-1.8%
EBP Prog.Coordinator	\$112,831	\$93,750	-\$19,081	-16.9%
Total AC Transit Budget w/PCO	\$32,318,888	\$31,724,580	-\$594,308	-1.8%

BART Budget FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	YTD Budget	T. 23/24 BART
Service Providers	\$868,073	\$1,085,118	\$868,073	\$976,595	\$1,085,118	\$1,193,640	\$976,595	\$976,595	\$976,595	\$976,595	\$976,595	\$1,193,641	\$9,982,999	\$12,153,235
Fuel	\$68,677	\$85,848	\$68,677	\$77,262	\$85,848	\$94,434	\$77,262	\$77,262	\$77,262	\$77,262	\$77,262	\$94,434	\$789,795	\$961,491
LD's	-\$10,202	-\$12,753	-\$10,202	-\$11,478	-\$12,753	-\$14,028	-\$11,478	-\$11,478	-\$11,478	-\$11,478	-\$11,478	-\$14,028	-\$117,327	-\$142,833
Less Muni Trip reimbursement	-\$4,935	-\$6,169	-\$4,935	-\$5,552	-\$6,169	-\$6,786	-\$5,552	-\$5,552	-\$5,552	-\$5,552	-\$5,552	-\$6,786	-\$56,756	-\$69,095
Adj. Service Providers with fuel	\$921,613	\$1,152,043	\$921,613	\$1,036,828	\$1,152,043	\$1,267,259	\$1,036,828	\$1,036,828	\$1,036,828	\$1,036,828	\$1,036,828	\$1,267,260	\$10,598,711	\$12,902,799
Broker	\$173,321	\$216,656	\$173,321	\$194,988	\$216,656	\$238,324	\$194,988	\$194,988	\$194,988	\$194,988	\$194,988	\$238,324	\$1,993,219	\$2,426,532
Verizon Cost	\$6,489	\$8,112	\$6,489	\$7,301	\$8,112	\$8,923	\$7,301	\$7,301	\$7,301	\$7,301	\$7,301	\$8,923	\$74,629	\$90,853
CTS Language Link	\$25	\$32	\$25	\$29	\$32	\$35	\$29	\$29	\$29	\$29	\$29	\$35	\$292	\$356
Broker Incentives	\$6,014	\$7,518	\$6,014	\$6,766	\$7,518	\$8,270	\$6,766	\$6,766	\$6,766	\$6,766	\$6,766	\$8,270	\$69,163	\$84,198
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Survey - 2024	\$884	\$1,106	\$884	\$995	\$1,106	\$1,216	\$995	\$995	\$995	\$995	\$995	\$1,216	\$10,171	\$12,382
Globe Tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Broker paid costs	\$186,734	\$233,423	\$186,734	\$210,078	\$233,423	\$256,768	\$210,078	\$210,078	\$210,078	\$210,078	\$210,078	\$256,768	\$2,147,474	\$2,614,320
Contactless Fare App	\$8,643	\$10,804	\$8,643	\$9,723	\$10,804	\$11,884	\$9,723	\$9,723	\$9,723	\$9,723	\$9,723	\$11,884	\$99,393	\$121,000
Budget Amount w/out PCO	\$1,116,989	\$1,396,270	\$1,116,989	\$1,256,630	\$1,396,270	\$1,535,910	\$1,256,630	\$1,256,630	\$1,256,630	\$1,256,630	\$1,256,630	\$1,535,912	\$12,845,578	\$15,638,119
EBP PCO	\$9,811	\$12,264	\$9,811	\$11,038	\$12,264	\$13,491	\$11,038	\$11,038	\$11,038	\$11,038	\$11,038	\$13,491	\$112,829	\$137,357
BART Planning Budget	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
BART Regional Trip Coordinator	\$5,943	\$7,429	\$5,943	\$6,686	\$7,429	\$8,172	\$6,686	\$6,686	\$6,686	\$6,686	\$6,686	\$8,172	\$68,343	\$83,200
Total BART w/PCO & Planning	\$1,132,743	\$1,415,963	\$1,132,743	\$1,274,353	\$1,415,963	\$1,557,572	\$1,274,353	\$1,274,353	\$1,274,353	\$1,274,353	\$1,274,353	\$1,557,574	\$13,026,749	\$15,858,676

BART Actuals FY23/24	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	BART YTD
Service Providers	\$1,123,099	\$1,236,383	\$1,161,752	\$1,236,309	\$1,154,002	\$1,152,152	\$1,173,793	\$936,872	\$1,174,454	\$1,191,452	\$0	\$0	\$11,540,270
Fuel	\$78,375	\$91,137	\$94,259	\$84,900	\$72,341	\$69,509	\$68,300	\$67,744	\$82,806	\$89,281	\$0	\$0	\$798,652
LD's	-\$18,445	-\$6,417	-\$12,555	-\$9,486	-\$9,889	-\$8,928	-\$9,486	-\$4,712	-\$13,144	-\$3,875	\$0	\$0	-\$96,937
Less Muni Trip reimbursement	-\$5,528	-\$6,602	-\$6,615	-\$7,208	-\$6,570	-\$5,581	-\$7,172	-\$6,738	-\$7,605	-\$7,582	\$0	\$0	-\$67,202
Adj. Service Providers with fuel	\$1,177,501	\$1,314,501	\$1,236,841	\$1,304,515	\$1,209,884	\$1,207,153	\$1,225,434	\$993,167	\$1,236,511	\$1,269,276	\$0	\$0	\$12,174,782
Broker	\$172,280	\$184,227	\$222,657	\$176,540	\$177,957	\$240,638	\$167,484	\$186,056	\$185,091	\$184,049	\$0	\$0	\$1,896,978
Verizon Cost	\$4,331	\$4,348	\$4,351	\$4,353	\$4,404	\$4,423	\$4,391	\$4,442	\$4,378	\$4,408	\$0	\$0	\$43,828
CTS Language Link	\$10	\$51	\$42	\$26	\$34	\$17	\$43	\$33	\$51	\$0	\$0	\$0	\$346
Broker Incentives	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	\$0	\$0	\$31,000
Emergency Plan	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Survey - 2024	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Globe tickets	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Total Broker paid costs	\$179,720	\$191,726	\$230,151	\$184,019	\$185,495	\$248,179	\$175,018	\$193,631	\$192,619	\$191,595	\$0	\$0	\$1,972,152
Contactless Fare App	\$5,669	\$6,314	\$7,682	\$6,304	\$6,162	\$5,659	\$6,115	\$6,611	\$6,895	\$6,608	\$0	\$0	\$64,018
Budget Amount w/out PCO	\$1,362,890	\$1,512,541	\$1,474,674	\$1,494,837	\$1,401,540	\$1,460,990	\$1,406,567	\$1,193,409	\$1,436,026	\$1,467,479	\$0	\$0	\$14,210,953
EBP PCO	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$9,375	\$0	\$0	\$93,750
BART Planning Budget	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
BART Regional Trip Coordinator	\$7,136	\$7,078	\$6,919	\$8,265	\$7,137	\$10,344	\$7,137	\$6,510	\$5,891	\$6,997	\$0	\$0	\$73,412
Total BART Costs w/Special Program Costs	\$1,379,401	\$1,528,993	\$1,490,968	\$1,512,477	\$1,418,052	\$1,480,709	\$1,423,079	\$1,209,294	\$1,451,291	\$1,483,851	\$0	\$0	\$14,378,115

BART FY23/24 Budget-to-Actual	YTD Budget	YTD Actual	Over/Under Budget \$	Over /Under Budget%
Service Providers	\$9,982,999	\$11,540,270	\$1,557,270	15.6%
Fuel	\$789,795	\$798,652	\$8,857	1.1%
LD's	-\$117,327	-\$96,937	\$20,390	-17.4%
Less Muni Trip reimbursement	-\$56,756	-\$67,202	-\$10,446	18.4%
Adj. Service Providers with fuel	\$10,598,711	\$12,174,782	\$1,576,071	14.9%
Broker	\$1,993,219	\$1,896,978	-\$96,241	-4.8%
Verizon Cost	\$74,629	\$43,828	-\$30,801	-41.3%
CTS Language Link	\$292	\$346	\$54	18.4%
Broker Incentives	\$69,163	\$31,000	-\$38,163	-55.2%
Emergency Plan	\$0	\$0	\$0	0.0%
Survey - 2023	\$10,171	\$0	-\$10,171	-100.0%
Globe tickets	\$0	\$0	\$0	0.0%
Total Broker paid costs	\$2,147,474	\$1,972,152	-\$175,321	-8.2%
Contactless Fare App	\$99,393	\$64,018	-\$35,375	-35.6%
Total BART w/out PCO	\$12,845,578	\$14,210,953	\$1,365,375	10.6%
EBP PCO	\$112,829	\$93,750	-\$19,079	-16.9%
BART Planning Budget	\$0	\$0	\$0	0.0%
BART Regional Trip Coordinator	\$68,343	\$73,412	\$5,069	0.0%
Total BART Budget w/PCO	\$13,026,749	\$14,378,115	\$1,351,366	10.4%

Budget to Actual with EBP and other costs billed to the contract:

	YTD Budget	YTD Actual	Over/under budget \$	% Over/Under Budget%
EBP	\$12,958,406	\$14,304,703	\$1,346,296	10.4%
RegTripCoor	\$68,343	\$73,412	\$5,069	7.4%
Total BART	\$13,026,749	\$14,378,115	\$1,351,366	10.4%

FY 23-24 Denial Summary Report

Date:	Capacity Denials	As a % of Trips Scheduled	Scheduled Denials	As a % of Trips Scheduled	Refused ADA Compliant Trip	As a % of Trips Scheduled	Total Denials plus Refused Compliant Trips	As a % of Trips Scheduled	Trips Scheduled
July 2023	6	0.012%	51	0.104%	0	0.00%	57	0.12%	49,232
August 2023	5	0.009%	54	0.099%	0	0.00%	59	0.11%	54,632
September 2023	4	0.008%	46	0.087%	1	0.00%	51	0.10%	53,017
October 2023	14	0.025%	2	0.004%	0	0.00%	16	0.03%	56,530
November 2023	7	0.013%	0	0.000%	2	0.00%	12	0.02%	51,968
December 2023	6	0.012%	0	0.000%	0	0.00%	7	0.01%	51,406
January 2024	7	0.013%	0	0.000%	0	0.00%	7	0.01%	52,570
February 2024	8	0.015%	0	0.000%	0	0.00%	8	0.02%	52,675
March 2024	11	0.020%	2	0.004%	1	0.00%	14	0.03%	55,892
April 2024	11	0.020%	0	0.000%	1	0.00%	12	0.02%	55,628
May 2024									
June 2024									
Year to Date	79	0.015%	155	0.029%	5	0.00%	243	0.05%	533,550

Definitions:

Capacity denial: Computer software was unable to locate a compliant trip and rider refused any trip.

Scheduled denial: Passenger accepted an offer of a pick-up time outside +/- one hour from the requested pick-up time.

Refused ADA Compliant trip: Passenger was offered a pick-up time within +/- one hour from the requested time but turned it down.

FY 23-24 Taxi Cab Summary

Date:	Total Cost	Total Cash Collected	Total Coupons Collected	Contactless Pre-pay	Fuel Surcharge, Misc	A1 Transport.	AP3 Systems	Bell Transit Net Cost	Five Rivers Transit Solutions	Star Transit	Total Cost less Cash Collected	Total Taxi Trips	AP Total Trips	Taxi Trips as a % of T. Trips
July 2023	\$544,599	\$9,796	\$8,048	\$4,154	\$1,103	\$54,887	\$149,125	\$233,291	\$11,330	\$95,966	\$535,906	5,747	32,953	17.4%
August 2023	\$602,858	\$11,090	\$9,289	\$4,608	\$1,735	\$59,570	\$152,163	\$262,145	\$17,874	\$111,106	\$593,502	6,431	36,412	17.7%
September 2023	\$572,263	\$10,469	\$8,451	\$4,530	\$2,026	\$69,965	\$145,838	\$232,094	\$21,049	\$103,316	\$563,821	6,142	35,671	17.2%
October 2023	\$658,098	\$11,449	\$9,029	\$5,759	\$2,015	\$75,593	\$170,557	\$275,489	\$20,617	\$115,842	\$648,664	7,110	37,944	18.7%
November 2023	\$590,749	\$10,784	\$8,316	\$5,153	\$1,106	\$64,885	\$151,526	\$253,315	\$11,427	\$109,596	\$581,071	6,354	34,483	18.4%
December 2023	\$558,698	\$9,741	\$8,224	\$4,738	\$838	\$67,417	\$151,349	\$240,313	\$9,218	\$90,401	\$549,795	6,022	32,850	18%
January 2024	\$585,877	\$9,825	\$8,613	\$5,089	\$944	\$68,445	\$155,973	\$250,985	\$10,381	\$100,093	\$576,996	6,293	34,604	18%
February 2024	\$546,259	\$9,104	\$9,317	\$5,170	\$1,825	\$0	\$175,100	\$255,410	\$20,072	\$95,677	\$538,980	6,204	34,796	18%
March 2024	\$600,944	\$10,501	\$9,438	\$5,403	\$1,857	\$0	\$181,926	\$289,228	\$20,422	\$109,368	\$592,299	6,709	36,831	18%
April 2024	\$590,505	\$10,786	\$8,923	\$5,610	\$1,803	\$0	\$169,752	\$288,128	\$19,832	\$112,794	\$581,522	6,778	37,026	18%
May 2024						\$0								
June 2024						\$0								
Total	\$5,850,850	\$103,544	\$87,648	\$50,214	\$15,251	\$460,762	\$1,603,309	\$2,580,399	\$162,221	\$1,044,158	\$5,762,556	63,790	353,570	18.0%

Service Providers & Taxi Comparison for the month of April 2024 and FY23/24 YTD

	RydeTrans				First Transit				MV Transportation				Taxis				Totals	
	April 2024	% of April Amount	YTD	YTD % of T.Amount	April 2024	% of April Amount	YTD	YTD % of T.Amount	April 2024	% of April Amount	YTD	YTD % of T.Amount	April 2024	% of April Amount	YTD	YTD % of T.Amount	April 2024	YTD Totals
Total Passengers	10,710	25.5%	103,339	25.9%	12,413	29.6%	114,752	28.8%	12,066	28.8%	116,688	29.3%	6,778	16%	63,790	16.0%	41,967	398,569
Total ADA Pax	9,510	25.7%	92,546	26.2%	10,952	29.6%	101,466	28.7%	10,739	29.0%	104,162	33.0%	5,825	16%	55,396	15.7%	37,026	353,570
Total Billable Hours	8,888	24.6%	89,252	25.1%	10,721	29.6%	100,812	28.3%	9,904	27.4%	99,700	28.0%	6,653	18%	66,137	18.6%	36,165	355,901
Total Revenue Hours	7,669	24.5%	76,697	25.0%	9,395	30.0%	88,297	28.7%	8,557	27.3%	86,190	28.1%	5,710	18%	56,025	18.2%	31,330	307,209
Non-Revenue Hours	1,218		12,555		1,326		12,515		1,347		13,510		944		10,112		4,835	48,692
Deadhead %		13.7%		14.1%		12.4%		12.4%		13.6%		13.6%		14.2%		15.3%	13.4%	13.7%
Total SP Cost	926,884	24.2%	9,308,102	24.7%	1,127,204	29.4%	10,599,341	28.1%	1,189,819	31.0%	11,977,983	31.7%	590,505	15%	5,850,850	15.5%	3,834,411	37,736,276
Cost per Trip	\$86.54		\$90.07		\$90.81		\$92.37		\$98.61		\$102.65		\$87.12		\$91.72		\$91.37	\$94.68
Total Pax Productivity		1.40		1.35		1.32		1.30		1.41		1.35		1.19		1.14	1.34	1.30
ADA Pax Productivity		1.24		1.21		1.17		1.15		1.26		1.21		1.02		0.99	1.18	1.15
On Time Performance	95.0%		95.8%		95.1%		95.8%		95.9%		97.2%		96.9%		97.4%		95.6%	96.5%
Trips > 60 min late	1	11.11%	15	18.52%	1	11.11%	28	34.57%	4	44.44%	16	19.75%	3	33.33%	22	27.16%	9	81
Total accidents/ 100,000 RVMiles		8.0		4.7		3.1		4.2		4.5		3.0					2.5	3.4
Roadcalls/100,000 Total miles		7.4		5.1		0.7		1.9		6.0		4.1					3.4	3.1
Complaints against the Serv Providers	24	20.3%	242	27.3%	42	35.6%	306	34.6%	21	17.8%	222	25.1%	31	26.3%	115	97.5%	118	885
Liquidated Damages	\$10,100	80.8%	\$202,100	64.6%	\$600	4.8%	\$46,800	15.0%	\$1,800	14.4%	\$63,800	20.4%					\$12,500	\$312,700

Notes:
 Total Accidents include Major, Minor and other Accidents.
 Liquidated damages include all LD's assessed per the invoice.
 Complaints include all SP complaints; they do not include those against the Broker.

	April 2024	YTD
Cost per Trip - Service Providers	\$92.19	\$95.24
Cost per Trip - Taxis	\$87.12	\$91.72
Cost per Hour - Taxis	\$88.75	\$88.47



CONTRA COSTA
transportation
authority

Measure J Paratransit Program 15 Claim FY 24-25 Project Description

Claimant/Agency: City of El Cerrito

Project Description:

1) If your claim will be used, entirely or in part, to operate a vehicle that provides service to seniors and/or persons with disabilities please provide:

a) Brief Paratransit System History

The City of El Cerrito has operated a Paratransit program since 1978 beginning with a Dial-a-ride (DaR) program. Our first vehicle, “Van Gogh” was purchased by our local Bridge Club with volunteer drivers keeping operating costs at a minimum. Prior to 1988, the program was funded through the Transportation Development Act (TDA) 4.5 funds and by Measure C County funds specified for paratransit. Since then, services have been supported with operating funds from Measure C and J County funds and City of El Cerrito staff support through the general fund. Persons served by this program are El Cerrito residents, seniors 65 and older and disabled residents 18 years and older who are unable to use fixed route public transportation due to disability, frailty, or age. Due to requests for our Easy Ride Senior and Disabled Paratransit Service, the service expanded from three to four full days per week, Monday through Thursday beginning July 1, 2009. An additional day of service was added to ERPS in July 2011, expanding the service from four to five full days each week, providing service Monday through Friday.

In March 2020, with COVID-19 restrictions in place, Easy Ride Senior and Disabled Paratransit Service pivoted and offered limited service two full days and one-half day a week (Monday, Tuesday, and Wednesday afternoon) using a single rider model. Trips were restricted to essential services only (grocery stores, medical appointments, pharmacies, and banks). Additionally, Easy Ride drivers and vehicles were deployed on Wednesday mornings to provide support delivering meals for the senior nutrition program which transitioned to a take-away meal format during the pandemic.

In September 2021, Easy Ride Senior and Disabled Paratransit Service resumed providing service four days a week, Monday through Thursday, while continuing to assist with senior nutrition take-away meal delivery on Wednesday mornings.

In October 2022, delivery of take-away meals ceased, and in-person congregate dining resumed. Easy Ride Senior and Disabled Paratransit Service returned to

transporting seniors living in El Cerrito to the Community Center for in-person dining two days per week.

Beginning September 2024, our in-person lunch program will expand to three days a week. Rides will be provided to seniors in El Cerrito attending the lunch program.

Historically, El Cerrito’s Recreation Department, Senior Services Division administers this program.

b) Types of service: *Check the box for each type of service you provide, and for each, provide a description of the service including a system overview, how the service is delivered (contracted, in-house), driver training, how service is monitored for effectiveness, ~~how the service is marketed~~, fares, etc. Include attachments if appropriate.*

Paratransit Service:

Easy Ride Senior and Disabled Paratransit Service operates an affordable, safe and convenient door-to-door transportation service primarily within El Cerrito city limits enabling seniors ages 65 and older and disabled residents 18 years and older to regularly run errands to local stores and businesses, get to work, visit friends and family, attend classes, do banking, pick-up medical prescriptions, access transportation at BART (Bay Area Rapid Transit) stations, go to the library, keep hair, medical, dental, and physical therapy appointments. These trips are essential to people who want to maximize their independence, quality, and satisfaction of life, pursue activities of interest, and seek opportunities for involvement in their community.

In September 2021, Easy Ride Senior and Disabled Paratransit Service expanded to include limited locations just outside of El Cerrito city limits. These areas include Albany Oral Surgery in Albany, as well as the Pacific East Mall, Costco, Grocery Outlet, Planet Fitness, and Target in Richmond.

Rides can be scheduled during regular business hours, Monday-Thursday, 9am-5pm, by calling or emailing up to two weeks in advance. The cost of each one-way ride is \$2. Rides to/from the Senior lunch program are free for program participants. Easy Ride Tickets are sold in groups of ten.

Measure J funds are used to operate this service. The program is monitored for effectiveness based on number of on-time trips, participant feedback and annual participant survey.

Taxi/TNC: N/A

Excursion Service:

The city provides rEC Treks (senior day trips) utilizing our vans purchased with Measure C funds to provide opportunities for enriching cultural excursions for seniors. Measure J funds are used to maintain the vans. Adult Programs & Services staff in the Recreation Department coordinate these trips. Pre-registration and advance payment are required. Trips include group travel to museums, regional parks, state and municipal public parks, out-of-town shopping and dining, tourist sites, and various places of interest in the San Francisco Bay Area.

rEC Trek fees vary based on mileage, entrance fee, length of trip, and staff. Post event participant feedback is used to monitor the program for effectiveness.

The frequency for scheduling rEC Treks is determined by staff and driver availability.

Meal trips:

Easy Ride Senior & Disabled Paratransit drivers and vans are used to bring participants to/from the El Cerrito Community Center for the in-person congregate dining program. This service is available for qualifying seniors living in El Cerrito aged 65 and older.

The county Senior Nutrition Program reimburses the city \$2 per ride to/from for East Bay Paratransit service and \$1 per ride to/from for Easy Ride Senior and Disabled Paratransit. These trips are essential to the health, well-being, and independence of our older population. Without providing these trips, many of our seniors would be unable to access essential nutrition.

Dial-A-Ride: N/A

Volunteer Driver Program: N/A

Other:

In September 2021, El Cerrito Senior and Disabled Paratransit Service expanded its service area to include limited locations in neighboring cities. Expanded service area locations include Sutter East Bay Medical Foundation Care Center and Albany Oral Surgery in Albany and Pacific East Mall, Costco, Grocery Outlet, Planet Fitness and Target in Richmond.

Rides are scheduled to these expanded locations in the same manner as traditional service. Rides can be scheduled up to two weeks in advance by calling or emailing during business hours. The cost of each one-way ride is \$2. Tickets are sold in groups of ten.

2) Budgets & Staffing: Complete attached Budget Spreadsheets

- a) Budget: If your agency received Measure J Program 15 funds in the past 3 years and did not spend the entire allocation ~~due to service reductions related to COVID please indicate the amounts in the spreadsheet~~ and for any reason, provide details here for how the funds will be spent. NOTE: Any funds must be spent in support of the agency's program to provide transportation services to seniors and people with disabilities.

The city is currently working on a class and compensation study which may result in an increase in compensation for drivers. As a part of the class and compensation study, we hope to update the job classification to include a classification that allows for drivers without class B licenses. We hope this will help with recruitment and retention. With the retirement of one of our Easy Ride drivers in December 2022, we have been operating our Easy Ride Senior and Disabled Paratransit Service program in a limited capacity with one part-time driver and one occasional substitute driver. Hours of operation are limited to 10am-2pm, four days per week, Monday through Thursday as a result. Trips to our lunch program and medical appointments are given priority over other types of trip requests. Recruitment for the driver position remains active.

Some of the funds have been used to purchase two tablets for use in paratransit vehicles to aid drivers with checking in riders, selling tickets, and using navigation tools which should help improve efficiency. Additional funds will be used to purchase additional equipment such as card readers and bar code scanners that are needed to put the tablets into practice

The City is exploring the possibility of purchasing a second ADA accessible minivan that would allow us to operate an Easy Ride vehicle with class C drivers as we are finding it increasingly difficult to hire qualified class B drivers. We are also exploring hybrid or electric vehicles which would provide a cost-effective alternative to driving the larger bus for short trips and given the layout of homes in El Cerrito, the smaller vehicle would be a more efficient way to provide service to residents living in the hills.

The City is still interested in learning what is required and what steps are needed to establish a program that offers subsidizing taxi or other ride hailing service (Uber, Lyft, etc.) fares to El Cerrito residents to enhance our current services. This option could also be used to offer additional services for residents wishing to travel outside of El Cerrito to Richmond Kaiser or Alta Bates Summit Medical Center in Berkeley, both of which are outside of our service area. We hope to work with WCCTAC to learn more about what is entailed in establishing a subsidized taxi/ride share program.

b) Staffing: Please complete the table below.

Position	Full Time	Part Time	Total FTEs	Total PTEs
Drivers	0	2	0	.4
Dispatch	1	0	.33	0
Admin	2	0	.3	0
Other	0	0	0	0

c) Staffing: For 'Admin' and 'Other' staffing positions noted in the above chart, please provide a brief description of the functions performed.

Administrative staff provide customer service, answer inquiries about the program and provide information and applications to interested residents. Review applications and once approved, input applicant into rec trac (database). Annual outreach phone calls and emails to update riders in our database to ensure their information is accurate. Ticket sales, tracking and reporting. Tracking information for reporting such as on-time performance, no shows, and mileage. Preparing documentation for annual CHP inspection. Coordinating vehicle maintenance and maintaining maintenance records.

d) Staffing: If your program expends Measure J Program 15 funds for personnel who are not actively engaged in the delivery of services, please explain. Responsibilities include administrative oversight for the program including customer service and scheduling rides, tracking performance indicators, staff scheduling, preparing dispatch logs for drivers, and preparing reports for measure J claim forms, budgeting, and CHP inspection. Act as backup driver for the program as needed when part-time driver is on vacation or calls out (prioritizing rides to/from Café Costa lunch program and medical appointments). Act as trip planner, leader and driver for rEC Trek Senior Day Trips. Coordinate transportation service with county lunch program. Attend meetings including Paratransit Coordinating Council meetings, Café Costa Senior Nutrition Program meetings and El Cerrito Committee on Aging meetings. Prepare and present informational materials about transportation services (including tabling at annual Senior Resource Fair).

3) Training: What initial training is provided to staff (admin and drivers) when they become part of your service team? What on-going training or certification does your staff participate in to qualify them to do the job (admin and drivers)?

a) What training do Customer Service staff receive? Attach training curriculum if you have it.

We have had the same team for awhile now and have not had to do initial training for some time. Typically, we provide new staff with an overview of the program and how things operate, including staff scheduling software (whentowork), submitting timecards, daily performance indicator logs, maintenance logs, and reading the daily dispatch. Both drivers and administrative staff receive DEI training and online Distracted Driver Training. Drivers are informed about the random drug and alcohol testing program and how that works as well as how to respond in the event of an accident or emergency. We will work to establish a more formalized training process for both administrative staff and drivers.

4) Liability & Testing: What insurance liabilities do you have to protect staff and passengers?

The City of El Cerrito is self-insured through the Municipal Pooling Authority (MPA). The City does not provide coverage for passengers unless they are injured through the fault of the city.

a) Are staff subject to drug and alcohol testing. If so, under what circumstances?

All drivers are enrolled in the City's random drug and alcohol testing program. Human Resources contracts out this service and notifies the program supervisor when a driver's name is pulled for random testing. Drivers are then sent to get tested before being permitted to perform their regular duties. Having only one driver means that we are not able to provide rides while the driver is sent for testing.

b) How are accidents and incidents handled? Is specialized training or materials provided to staff?

Accident kits are in every city vehicle. These kits include instructions on how to complete accident reports, who to contact and information to gather. Drivers are given an orientation on how to report accidents and incidents during their initial training.

5) If your claim will be used, entirely or in part, to provide a program other than operating a vehicle, please provide the following:

a) Brief description of the program including a brief history of the program, who the program serves, reason for the program, marketing efforts, etc.

N/A

We would like to determine what is involved and how to receive support in establishing a subsidized taxi or ride hailing service (Uber, Lyft, etc.) to better serve El Cerrito residents needing rides to medical appointments to Kaiser Richmond and Alta Bates Summit Medical Center which are outside of our service area.

- b) If the program includes subsidizing paratransit or taxi or other ride hailing service (Uber, Lyft, etc.) fares please include the amount of the subsidy and explain in detail how your program works. Include a service area map of what zones you pick up in and what zones you drop off in. Please include any marketing materials you distribute and discuss how people learn about your program. Explain how people order a trip. If you serve pick-up locations outside your city, please list the number of pick-ups each month you provided to these “outside” areas.

N/A

At this point, we do not offer this type of service. We are interested however in learning who we can work with to gather information and possibly support in setting up this type of program.

- c) In these programs, how do you ensure that mobility aid users and ambulatory customers have equivalent access and service reliability?

N/A

- 6) Please provide a brief description of how your agency solicits feedback from passengers and potential passengers about your service, (i.e., surveys, comment cards, customer service logs).

Drivers communicate with the riders daily. Office staff engages with riders during ride scheduling. We are currently developing an annual renewal process with the intention of gathering updated contact information, ADA needs and program feedback from participants.

- a) How do you utilize that input to inform and improve your program?

Administrative staff and drivers check in daily. During daily check-ins suggestions and feedback are discussed and potential improvements are communicated and implemented.

- b) Do you have a committee of residents that meets to discuss your program? Explain how often this group meets and how it is staffed.

El Cerrito Committee on Aging meets regularly to discuss issues and

concerns related to seniors and disabled adult residents of El Cerrito including transportation issues. The committee is comprised of volunteer residents who have been appointed by the City Council for a set term. There is a City Council liaison and a staff liaison assigned to the committee responsible for oversight and compliance with the Brown Act.

- 7) How do you record and track customer complaints. What procedures do you have in place to resolve them?

Customer complaints and feedback are logged on to the daily driver forms and dispatch logs as well as shared with program admin staff. Admin staff meet to discuss the complaint/concern and make determinations regarding the individual situations. If applicable, staff discuss steps to address the complaint.

- a) What customer service metrics do you track: ie Phone hold times, late/early pick-ups, fare disputes, loading problems, etc. How are these metrics trending year over year?

We track late pick-ups, fare disputes, and loading problems. These items are noted on the daily dispatch logs and communicated to the driver and oversight staff to determine if they are one-time issues or something that requires a longer-term plan to address/rectify. These metrics have remained consistent with past years.

- b) If you have vendors delivering service on your behalf, what procedures do you have in place to gather and resolve complaints they receive.

N/A

- 8) Please describe how your service is monitored and what criteria you use. Include tools you use to monitor performance, frequency of monitoring and reports generated. Include samples of reports from software used by your agency.

Drivers receive a daily dispatch report with rider names, phone numbers, addresses, drop-off locations and scheduled pick-up times/locations. Drivers complete a daily "Service Performance Indicator Report. The report contains information that includes daily mileage, number of riders, types of riders, ADA accommodation (wheelchair, lift, cane, caregiver, etc.), and if a rider was a no-show or cancellation, fare disputes, or other concerns.

a) Please include the key performance indicators you use to measure the success of your program in the chart below. (Example: cost per passenger, on-time performance, complaints)

Metric	Goal	Prior FY	FY YTD
Maintain above average record of on-time performance for drivers.	90%	100%	88%
Complete annual renewal of rider membership by no later than July 15th of each year.	100%	90%	90%
Maintain an average of 200 one-way trips per month.	200 trips/month	Average 189 trips/month	Average 171 trips/month
Increase the total number of revenue service hours offered.	Recruit, hire, train and retain part-time van drivers to increase operation service hours.	777 hours	687.5 hours

b) If services have degraded per the performance metrics reported, what were the reasons, and what actions are you taking to improve service?
 Numbers are marginally lower as a result of the limited capacity available due to only having one regular part-time driver.

9) Please describe how, and with what frequency, your policy makers (Board or Council) review operating budget and performance of the service you provide. Do you submit an annual report to bring your Board or Council? Please include that document in this claim.

El Cerrito City Council reviews the operating budget twice per year during their city-wide mid-year budget review and annual budget process. Once CCTA approves this report, we will present the information and solicit feedback from the City of El Cerrito Committee on Aging who advises the City Council.

Here is the link to [budget documents for FY2024-25](#). Please note that we

anticipate the FY2024-25 budget will be approved in June 2024.

- 10) How many people are registered in your client database now? How many unincorporated area residents does this include? How often do you review and update this database to reflect changes in client eligibility or activity?

There are currently 133 riders enrolled in the City of El Cerrito Easy Ride Senior and Disabled Paratransit program. El Cerrito does not provide service to any unincorporated areas. We require annual renewal in the Easy Ride program to maintain up-to-date, accurate rosters of participants. Annual renewal in July/August each year.

- a) How many of those in your client database are active riders (i.e., took at least one ride in the last six months)?

Of the 133 riders enrolled in the program, only 64 are active riders having taken at least one ride in the past six months.

- 11) Please discuss any known unmet paratransit needs in your service area. For example, residents asking to be picked-up or dropped off outside your service area to medical facilities in another city, specific locations that are frequently requested that are not within your service area, requests for additional hours or days of service, etc.

Since July 2023, we have received a total of twenty-seven requests for transportation to medical facilities that are outside of our service area. We have received eight requests for rides to locations that are one to two miles outside of our service area and an additional six requests that are three to five miles outside of our service area. Additionally, we have received thirty same-day ride requests that we were unable to accommodate due to capacity. It is important to note that our capacity is limited due to having only one part-time paratransit driver on staff and prioritizing trips to our congregate dining program, our Respite program, and medical appointments.

- 12) Service Area: Please provide a map of the service area and tables to illustrate the data, as appropriate. Describe both who is geographically eligible to ride your service and where your service will take and pick up those eligible riders. Residents living in El Cerrito city limits (94530 zip code), who meet program criteria and complete enrollment paperwork are eligible to participate in the Easy Ride Program.

The service area includes El Cerrito city limits. In September 2022, we expanded the service area to include specific destinations within 1 mile of El Cerrito city limits. Identified destinations outside city limits are limited to: Sutter East Bay Medical Center and Albany Oral Surgery in Albany; Pacific East Mall, Costco, Alvarado Adult

School, Richmond Annex Senior Center, Grocery Outlet, and Target in Richmond. The proximity of the expanded locations to El Cerrito city limits allows drivers to expand the service area while maintaining allocated times of 15-20 minutes per ride from pick up location to drop off location.

- 13) Please share how you promote and market the programs you offer to potential new clients. Describe your outreach efforts in terms of Limited English Proficiency and Title VI. Attach your public-facing promotional materials, including your website address. Are your outreach materials available in languages other than English? If so, what languages?

Information about the Easy Ride Senior and Disabled Paratransit program is posted on the City website www.el-cerrito.org/senior , on bulletin boards in our Community Center, included in our monthly 60+ newsletter and given to all lunch participants when they enroll in the lunch program. Information about the program is also distributed at our annual Senior Resource Fair in the fall and during Senior Presentations in the spring. Currently information about the Easy Ride program is available in English only.

- 14) Please provide any additional information that you feel is unique or relevant to the transportation service that you provide to seniors or people with disabilities.

El Cerrito continues to struggle to find qualified class B drivers for the program. Having only one part-time driver, who is available to drive a maximum of four days per week for a total of four hours each day limits our ability to increase capacity for service. Due to our contract with the Area Agency on Aging Senior Nutrition Program we are required to prioritize rides to/from Café Costa which further limits our availability to provide trips to grocery stores and medical appointments.

- 15) **West County Operators Only** Program 20b: Please describe how your agency will use program 20b funds (the amount your agency will receive is provided in the budget form). Note: It is the intent of the Measure J Transportation Expenditure Plan that Program 20b funds be used to provide “additional or new services” beyond what was previously provided under Measure C or “regular” service. If you previously started a new or additional service with these funds you can continue to use these funds to operate that service as long as it is productive.

Beginning in September 2021, with WCCTAC permission, we expand the service area to identified locations within a 1-mile radius of El Cerrito city limits. The proximity of the expanded locations to El Cerrito city limits allowed drivers to expand the service area while maintaining allocated times of 15-20 minutes per ride from pick up location to drop off location. The service area expansion has allowed

our riders to attend programs at the Richmond Annex Senior Center and Alvarado Adult School as well as enhanced shopping and pharmacy needs by including trips to Target in Richmond.

We have purchased tablets and are looking to purchase card readers and bar scanners for the two Easy Ride vehicles that we must aid drivers in redeeming tickets, selling ticket booklets, monitoring daily dispatch, and using navigation tools. We anticipate that this will increase efficiency and program delivery.

We would like to identify agencies or organizations who can assist us in learning what would be required to run a fare subsidy program in addition to providing us with resources to assist us in setting up a fare subsidy program that would offer to subsidize paratransit, taxi or other ride hailing service (Go Go Grandparent, Uber, Lyft, etc.) fares to El Cerrito residents wishing to travel to Richmond Kaiser or Alta Bates Summit Medical Center in Berkeley. We need to gather information and find support in designing said program, and then evaluate whether we have the capacity to implement the program.

Table A - Measure J Claim Summary - CITY

	FY 22/23 Actual	FY 23/24 Projected	FY 24/25 Estimate
Program Sources (Revenues)			
	100% allocation		100% allocation
Measure J Prog 15	\$ 146,631	\$ 156,420	\$ 165,003
Measure J Prog 20	\$ 52,193	\$ 55,591	\$ 57,950
Measure J local reserves			\$ 116,000
Measure J Interest	\$ 8,951	\$ 14,000	\$ 12,000
Fares from Paratransit Service	\$ 3,915	\$ 2,000	\$ 5,500
Fares from Excursion Services	\$ 690	\$ 580	\$ 1,000
Outside Provider Fare Ticket Sales	\$ -	\$ -	\$ -
City General Fund			
Nutrition Program	\$ 2,283	\$ 1,630	\$ 3,500
Other -			
Total Other	\$ -	\$ -	\$ -
TOTAL PROGRAM SOURCES	\$ 214,663	\$ 230,221	\$ 360,953
Program Uses (Expenditures)			
General Administration	\$ 18,374	\$ 15,720	\$ 33,295
Paratransit Operations	\$ 79,587	\$ 66,811	\$ 141,503
Excursion Operations	\$ 26,529	\$ 20,271	\$ 47,168
Fare Subsidy Operations	\$ -	\$ -	\$ -
Fare Subsidy - Taxi/TNC	\$ -	\$ -	\$ -
Fare Subsidy - Paratransit	\$ -	\$ -	\$ -
Other -		\$ -	\$ -
Other -		\$ -	\$ -
TOTAL PROGRAM USES	\$ 124,490	\$ 102,802	\$ 221,966
Capital Expenditures		\$ 2,000	\$ 138,000
NET OPERATING BALANCE	\$ 90,173	\$ 125,419	\$ 987
Measure J Funds: Changes in Reserve Balance			
Beginning Reserve Balance	\$ 434,149	\$ 524,322	\$ 649,741
Annual Revenue	\$ 214,663	\$ 230,221	\$ 360,953
Annual Operating Expenditures	\$ 124,490	\$ 102,802	\$ 221,966
Annual Capital Expenditures	\$ -	\$ 2,000	\$ 138,000
Ending Reserve Balance	\$ 524,322	\$ 649,741	\$ 650,728

Measure J Countywide Transportation for Seniors
and People with Disabilities Program (Program 15)
FY 2024-25

Table B - Capital Needs and Acquisition Forecast

Anticipated Purchases	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate
Windows Tablet for Ticket Purchases on van	\$ -	\$ 2,000	
2 Class A Rear lift food chassis 10 passenger bus		\$ -	\$ 138,000
3			
4			
5			
6			
TOTAL	\$ -	\$ 2,000	\$ 138,000

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2024-25

Table C - Performance Indicators CITY

EDIT NOTES

Activity	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate	
PARATRANSIT or DIAL-A-RIDE (DAR) OPERATION				
Total Registered Clients - Incorporated service area	80	133	150	
Total Registered Clients - Unincorporated service area if applicable	0	0	0	
Total Registered Clients	80	133	150	
Total Paratransit & DAR Passenger Boardings	1593	2400	2500	Clarify that this is intended to capture one-way passenger boardings. Edited note for clarity
Total Revenue Service Hours (RSHr)	777	800	800	See note for edited definitions - edited for clarity
Passenger Boardings per RSHr	3	3	3	See note for edited definitions - edited for clarity
Total Revenue Service Miles (RSM)	2,989	3,500	4,000	Added to allow for clearer calculation of Avg. Pass Trip distance
Average Passenger Trip Distance	3	2.69	3	See note for edited definitions - edited for clarity and to reference miles added
Number of Wheelchair Passenger Boardings	0	0	0	Edited for clarity to report wheelchair boardings.
Number of Paratransit & DAR No-Shows	7	23	15	See note for edited definitions - edited to define their measure of 'cancel'
Number of Paratransit & DAR Cancellations	57	141	50	See note for edited definitions - edited to define their measure of 'cancel'
Number of Trip Denials	0	0	0	
Number of Reservation Denials	4	2	4	
Number of Multi-Agency Trips	0	0	0	
Number of Accidents	0	0	0	
Percent of On-Time Performance	100	88	90	See note for edited definitions - edited to define their measure of service window
TNC/TAXI SERVICE				
To avoid confusion and mixing of service metrics, this category has been added				
Total TNC/Taxi Passenger Boardings	0	0	0	See note for definition
Total of Extended Days or Hours TNC/Taxi Passenger Boardings	0	0	0	See note for definition.
Total of Extended Areas TNC/Taxi Passenger Boardings	0	0	0	See note for definition
EXCURSION or GROUP TRIP OPERATION				
Number of Vehicle Trips	9	7	12	
Number of Vehicle Trips Outside Contra Costa or Alameda County	7	6	8	
Number of Total Passengers Boardings	138	116	200	
Number of Wheelchair Passenger Boardings	0	0	0	
Number of ADA Eligible Passengers	0	0	0	
FARE SUBSIDY				
Eliminate here or add to Budget Table				
Number of Tickets Sold	0	0	0	
\$ Amount of Tickets Sold	\$0	\$0	0	

see directions (and glossary) for the definitions of the above terms and the appropriate formulas

Table E - Unmet Needs

	1st Quarter Jul. - Sept.	2nd Quarter Oct. - Dec.	3rd Quarter Jan. - Mar.	4th Quarter Apr. - Jun.	Just one FY column rather than quarterly.
Patrons inside your service area requesting rides outside of your service area					
1-2 miles	3	1	2	2	
3-5 miles	1	1	2	2	
6-10 miles	0	0	0	0	
11+ miles	0	0	0	0	
Applicants for ADA service more than 1+ miles from public transit	0	0	0	0	
New, potential clients outside your service area requesting rides	0	0	0	0	
Requested trips by existing clients to medical facilities outside of service area	9	8	4	6	
One Seat Ride Pilot program - # referred due to service limitations	0	0	0	0	
Transport requests from unhoused individuals with no home address	0	0	0	0	
Unhoused individuals who refuse to deboard after service	0	0	0	0	
Number of same-day ride denials due to capacity	9	6	5	10	
Number of same-day rides referred to a contracted service due to capacity	0	0	0	0	
OTHER:	n/a	n/a	n/a	n/a	
<p>What can you do now to meet these service needs? Advocate for increased wages for van drivers to improve recruitment and retention.</p>					
<p>What resources do you need to meet the need? It is likely that if we had additional drivers we would have increased capacity and be better able to accommodate same day rides. We are working on increasing van driver pay to improve recruitment and retention If we were allowed to offer a fare subsidy program for residents to take them to medical facilities outside of our service area the needs of those riders wishing to go to medical appointments would be met.</p>					



Measure J Paratransit Program 15 Claim FY 24-25 Project Description

Claimant/Agency: City of San Pablo

Project Description: San Pablo Senior & Disabled Transportation

1) If your claim will be used, entirely or in part, to operate a vehicle that provides service to seniors and/or persons with disabilities please provide:

a) Brief Paratransit System History

San Pablo Senior & Disabled Transportation (SPSDT) provides Door-to-Door Shuttle service to San Pablo residents (50 years and older) and individuals with disabilities (18 years and older), as well as Non-Residents living in unincorporated areas of San Pablo. Residents can utilize the service to go to their preferred locations, such as medical appointments, food shopping, errands, religious services, or social events.

Riders must fill out an application to participate in our program. The processing time for applications is 24 to 48 hours. Riders who register for the first time receive a free round trip. The program makes use of three vehicles: a 2017 Ford - 350 StarCraft that seats seven people and two wheelchairs, a 2020 Ford - 450 StarCraft that seats twelve people and one wheelchair, and a 2018 Dodge Caravan that seats five people and one wheelchair. Both larger fleet buses are currently being used to fulfill shared rides.

b) Types of service: *Check the box for each type of service you provide, and for each, provide a description of the service including a system overview, how the service is delivered (contracted, in-house), driver training, how service is monitored for effectiveness, fares, etc. Include attachments if appropriate.*

Paratransit Service:

(SPSDT) is a door-to-door service offered Monday through Friday, 9:00 am to 4:00 pm servicing City of San Pablo, and parts of unincorporated San Pablo, Richmond and Pinole. Since there is no Kaiser or larger medical services in San Pablo we make it a point to take our passengers to both Kaiser Pinole and Kaiser Richmond even though Kaiser Richmond is outside our service area. The majority of the locations include medical appointments, shopping, or banking. San Pablo residents pay \$2 while unincorporated San Pablo non-residents pay \$4 one way. Reservations for rides must be made at least 24 hours in advance and up to 3 days in advance (City holidays excluded). If there is time, same-day requests are taken into consideration. We accept cash as payment for rides, and we sell door-to-door ticket books containing 10 tickets for \$20 each. Each ticket is valid for a single trip.

Staffing consists of the Community Services Manager (20% time), and full time Community Services Coordinator, 2 full-time drivers and added this year, a part-time Administrative person. The admin services position was added to help increase the capacity of the coordinator. Unfortunately beginning January 2024 – March 2024 our coordinator was on leave; They returned for 3 weeks and then resigned. Our program has been without a full-time coordinator

for six months (January – June 2024) and we have been relying heavily on administrative staff as well as paying both our drivers 5 % out of class pay to assist with dispatching and phone calls.

The Community Services Coordinator and Community Services Manager attend local and regional gatherings. The decision-making responsibilities for overall program structure, funding/revenue generation, budget monitoring, and implementation of mobility management strategies for the program are also divided amongst the full time coordinator and manager with the larger decisions being the responsibility of the manager and director of the Community Services department.

The Community Services coordinator oversees all areas of the transportation office, including software deployment, driver supervision, driver training, scheduling/dispatching, vehicle maintenance scheduling, marketing/outreach, updating department web pages, data tracking, and reporting. They also write weekly, monthly, and quarterly reports as needed and supervises two full-time drivers and one part-time administrative staff. To schedule rides and verify manifests, we utilize Routematch software to improve efficiency, optimize performance delivery, improve trip management, increase passenger per revenue mile, and reduce no-shows. The coordinator is also a backup driver.

City of San Pablo staff survey our consumers to gather their feedback to gauge and monitor program efficiencies and effectiveness. Since our ridership has increased, we are currently working to develop a survey in the upcoming fiscal year to obtain the most recent feedback from our riders on the transportation program. Drivers and the coordinator are in continual contact, and the coordinator often drives as well and gets constant feedback from the passengers.

We advertise our programs via social media, the city website, the senior center newsletter, local resident houses, and City publications such as the City Manager's weekly report, quarterly activity guide. Our information is in the Contra Costa Crisis Center, 211 providers' material and Comcast Cable Chanel 36. We attend City-wide community events and local senior information fairs to provide information about our programs. We also diligently promote our services at all senior events such as casino trips, social trips and our 5-day a week congregate meal service.

Excursion Service:

We organize outings for seniors and those with disabilities to various destinations across the Bay Area. We use our 14-passenger bus for these trips so we can seat 12 people and 2 people with a wheelchair. We offered five social trips this fiscal year: Downtown Alameda Art & Wine Fair, SF Ferry Building via the Richmond Ferry, Pittsburg Seafood Festival, Walmart & Red Lobster, Fenton's and an outdoor concert in Vacaville, Half Moon Bay Art & Pumpkin Festival (2 trips) and cherry picking in Brentwood. The monthly senior center newsletter that is distributed to all senior center members includes trip announcements. Our outings are also advertised in the city's Community Services activity guide. Depending on entry fees, etc. we charge between \$5 and \$95 per person.

Meal trips:

SPSDT provides transportation for senior participants who attend the nutrition program at the San Pablo Senior Center Monday through Friday. Seniors are picked up at home and brought to the senior center for lunch and returned back home between the hours of 10:30 am - 1 pm. For more information, please refer to the Service area map. These rides are scheduled in the same manner as regular rides and cost \$2 for San Pablo residents and \$4 for non-residents one way.

SPSDT also provides a twice-monthly delivery service for the senior food program formerly

known as Brown Bag to eligible seniors. The program is run by the Contra Costa County & Solano Food Bank, and we help with bag deliveries to eligible participants who are unable to pick up bags and have them delivered to their homes. The San Pablo Library hosts this event on the first and third Fridays of each month. We charge \$4 for residents and \$6 for non-residents for delivery of their food. Senior Center Volunteers who help with the nutrition program, front desk, data entry, and social programming are given free rides to and from the senior center when they are volunteering.

Other:

SPSDT is an active participant in WCCTAC’s Travel Training program. We offered a travel training orientation on August 3, 2023 at the San Pablo Senior Center. We did not get enough people to sign up for a trip but we are excited about participating when the program is reinstated.

SPSDT sells East Bay Paratransit booklets, which can be purchased there from Monday through Friday from 8 a.m. to 5 p.m. The East Bay Paratransit offers tickets starting at \$40.

2) Budgets & Staffing: Complete attached Budget Spreadsheets

a) Budget: If your agency received Measure J Program 15 funds in the past 3 years and did not spend the entire allocation for any reason, provide details here for how the funds will be spent. NOTE: Any funds must be spent in support of the agency’s program to provide transportation services to seniors and people with disabilities.

We want to boost travel training workshops and reinstate monthly social outings with these funds during the next two years. Being down our transportation coordinator for 6 months as well as our senior program coordinator for one-year, social trip and travel training programs were greatly diminished or put on hold some months to make sure we were providing essential services. We have and continue to use these funds to extend services to Richmond and Pinole Kaiser which are out of our area but are a crucial need for our residents and service area. As our program continues to expand, we have added a part time admin to help with the program. We also plan to add a part-time driver starting July 16, 2024 to help with demand during peak times (9 am – 1 pm). We are transitioning in the next 6 months to a new software system and will be adding tablets and GPS to all or transit vehicles. We also plan to purchase a new vehicle within the next two years, increase our marketing efforts and purchase / license more software options for dispatching and outreach.

b) Staffing: Please complete the table below.

Position	Full Time	Part Time	Total FTEs	Total PTEs
Drivers	2	1		
Dispatch/Coordinator	1			
Admin		1		
Other				

- c) **Staffing: For 'Admin' and 'Other' staffing positions noted in the above chart, please provide a brief description of the functions performed.**

We have 1 administrative person at half time that helps process applications, answer inquiries about our program, send out welcome packets, follow up with our clients as needed and prepare marketing materials.

- d) **Staffing: If your program expends Measure J Program 15 funds for personnel who are not actively engaged in the delivery of services, please explain.**

We charge 10 % of the Community Services Manager salary to the Measure J budget. The Manager directly supervises the program and other full time staff but does not actively participate on a day by day basis.

3) Training: What initial training is provided to staff (admin and drivers) when they become part of your service team? What on-going training or certification does your staff participate in to qualify them to do the job (admin and drivers)?

Our City does an on-boarding training through our Human Resources Department with all full time and part time drivers letting them know City policies, employee rights and basic functions. Each driver trains for 2-weeks with a current driver getting to know the routes and specifics. Driver's can communicate with each other and the Dispatcher at any time for questions, assistance, etc. There are monthly staff meetings with all Paratransit staff to discuss customers, issues, develop solutions and receive training. Staff are given the opportunity to take CPR / FA training each year. We also use an on-line training program to show driver's pertinent videos about driver safety and rules of the road twice per year.

What training do Customer Service staff receive? Attach training curriculum if you have it.

Our training is on the job. We review the customer guide book and the rules and regulations we have for providing service.

4) Liability & Testing: What insurance liabilities do you have to protect staff and passengers?

We are covered by our Municipal Pooling Authority (MPA)

- a) **Are staff subject to drug and alcohol testing. If so, under what circumstances?**

Yes, we do a random DOT testing through a pull program administered through our Human Resources Department

- b) **How are accidents and incidents handled? Is specialized training or materials provided to staff?** We follow the guidelines given to us through our Human Resources Department developed with MPA (Municipal Pooling Authority) which is the City's insurance pool. Each vehicle has an accident report packet with directions on the steps to take when there is an accident. We also notify the San Pablo Police Department or Sheriff's Office for a report in case of an accident.

We also have incident reports and staff received bi-annual training on how to complete these forms. Most incidents are discussed with the program coordinator and forms are completed together along with next steps. Incidents are also reported to Human Resources and determined there if the report should be pushed to MPA.

- 5) If your claim will be used, entirely or in part, to provide a program other than operating a vehicle, please provide the following:
- a) Brief description of the program including a brief history of the program, who the program serves, reason for the program, marketing efforts, etc.
 - b) If the program includes subsidizing paratransit or taxi or other ride hailing service (Uber, Lyft, etc.) fares please include the amount of the subsidy and explain in detail how your program works. Include a service area map of what zones you pick up in and what zones you drop off in. Please include any marketing materials you distribute and discuss how people learn about your program. Explain how people order a trip. If you serve pick-up locations outside your city, please list the number of pick-ups each month you provided to these “outside” areas.
 - c) In these programs, how do you ensure that mobility aid users and ambulatory customers have equivalent access and service reliability?
- 6) Please provide a brief description of how your agency solicits feedback from passengers and potential passengers about your service, (i.e., surveys, comment cards, customer service logs).

Participants and locals can fill out a remark card that is available in our vehicles. Additionally, we poll our riders. To gather input from the public, our Community Services Manager attends WCCTAC Board of Director meetings, ACOA meetings, and we are a part of the Paratransit Coordinating Council. We also go to other local gatherings where there are public representatives. The general public is also welcome to phone or visit the senior center to voice their opinions to our staff. Since our office is located in the senior center we got a lot of feedback about places people want to go and what transportation issues they are struggling with.

- a) **How do you utilize that input to inform and improve your program?**
We meet monthly with the drivers and are always revising our program in little ways to make it better.
 - b) **Do you have a committee of residents that meets to discuss your program? Explain how often this group meets and how it is staffed.** We have the Senior Advisory Board which meets 1 per month and is made up of members of the senior center and transportation riders. City staff attend all meetings.
- 7) **How do you record and track customer complaints. What procedures do you have in place to resolve them?** We are a small team of 1 coordinator and 2 drivers. We mostly discuss issues that come up. If they are a big issue like deny a ride, we complete an incident report and work to resolve.
- a) **What customer service metrics do you track: ie Phone hold times, late/early pick-ups, fare disputes, loading problems, etc. How are these metrics trending year over year?**
We track loading / unloading times, traffic issues on local roads and late/early pick ups. These are all noted on our manifests. We have been experiencing more people with walkers, canes that need more loading time that decreases some of the rides we are able to give.

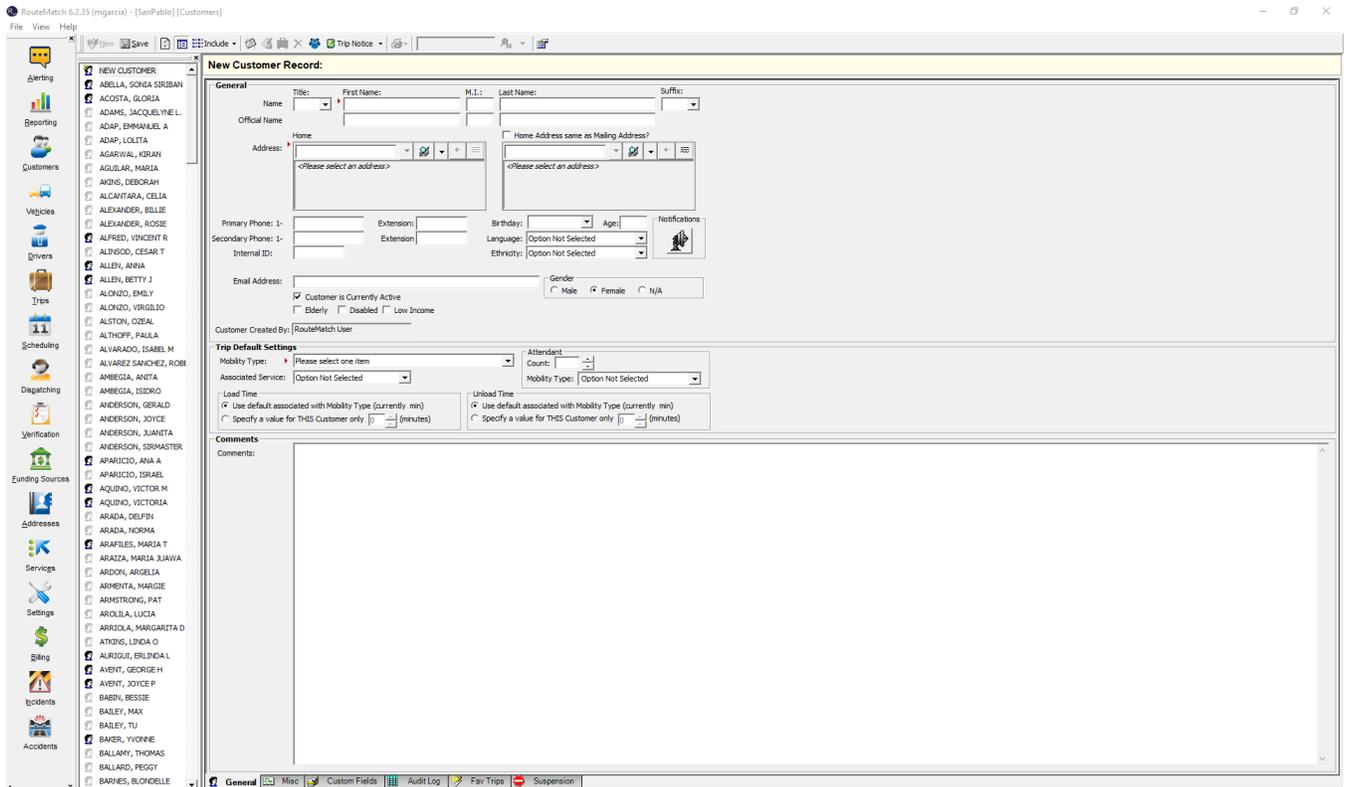
b) If you have vendors delivering service on your behalf, what procedures do you have in place to gather and resolve complaints they receive. N/A

8) Please describe how your service is monitored and what criteria you use. Include tools you use to monitor performance, frequency of monitoring and reports generated. Include samples of reports from software used by your agency.

Again, due to our size (2 vehicles per day) we can easily monitor the amount of rides we provide and late/early pick up to note if the statistics are increasing or decreasing. We also have only 1 dispatcher so they gather all the customer requests, complaints, etc. Our main measure of success is continued ridership and maintaining or increasing our ride numbers. They have steadily been increasing since our return from COVID.

RouteMatch Software is used to keep track of San Pablo Transportation. We are using this program to store rider data in our database. It is used to schedule rides and also stores data for reporting. The schedule is monitored for any cancellations or changes of any type. Data is gathered in this way to produce reporting for quarterly reports.

The image below is the RouteMatch customer database and attached is a completed daily manifest.



Please include the key performance indicators you use to measure the success of your program in the chart below. (Example: cost per passenger, on-time performance, complaints) We do not currently use any specific metrics.

Metric	Goal	Prior FY	FY YTD

a) If services have degraded per the performance metrics reported, what were the reasons, and what actions are you taking to improve service?

9) Please describe how, and with what frequency, your policy makers (Board or Council) review operating budget and performance of the service you provide. Do you submit an annual report to your Board or Council? Please include that document in this claim.

We provide updates to the Community Services Standing Committee quarterly with statistical information and any noteworthy transportation-related features and bring one update a year to city council. The City of San Pablo council members are well known for participating in our daily activities, whether they need a ride or sign up for a social outing. Additionally, the staff work with the City's Finance division on the annual mid-year and end-of-fiscal-year budget reports for evaluation.

10) How many people are registered in your client database now? How many unincorporated area residents does this include?

- a) 260 total and 160 non-residents.
- b) **How often do you review and update this database to reflect changes in client eligibility or activity?** We renew our applications annually.
- c) **How many of those in your client database are active riders (i.e., took at least one ride in the last six months)?** We have approximately 250 active riders. Some do only ride 1 or twice a year.

11) Please discuss any known unmet paratransit needs in your service area. For example, residents asking to be picked-up or dropped off outside your service area to medical facilities in another city, specific locations that are frequently requested that are not within your service area, requests for additional hours or days of service, etc.

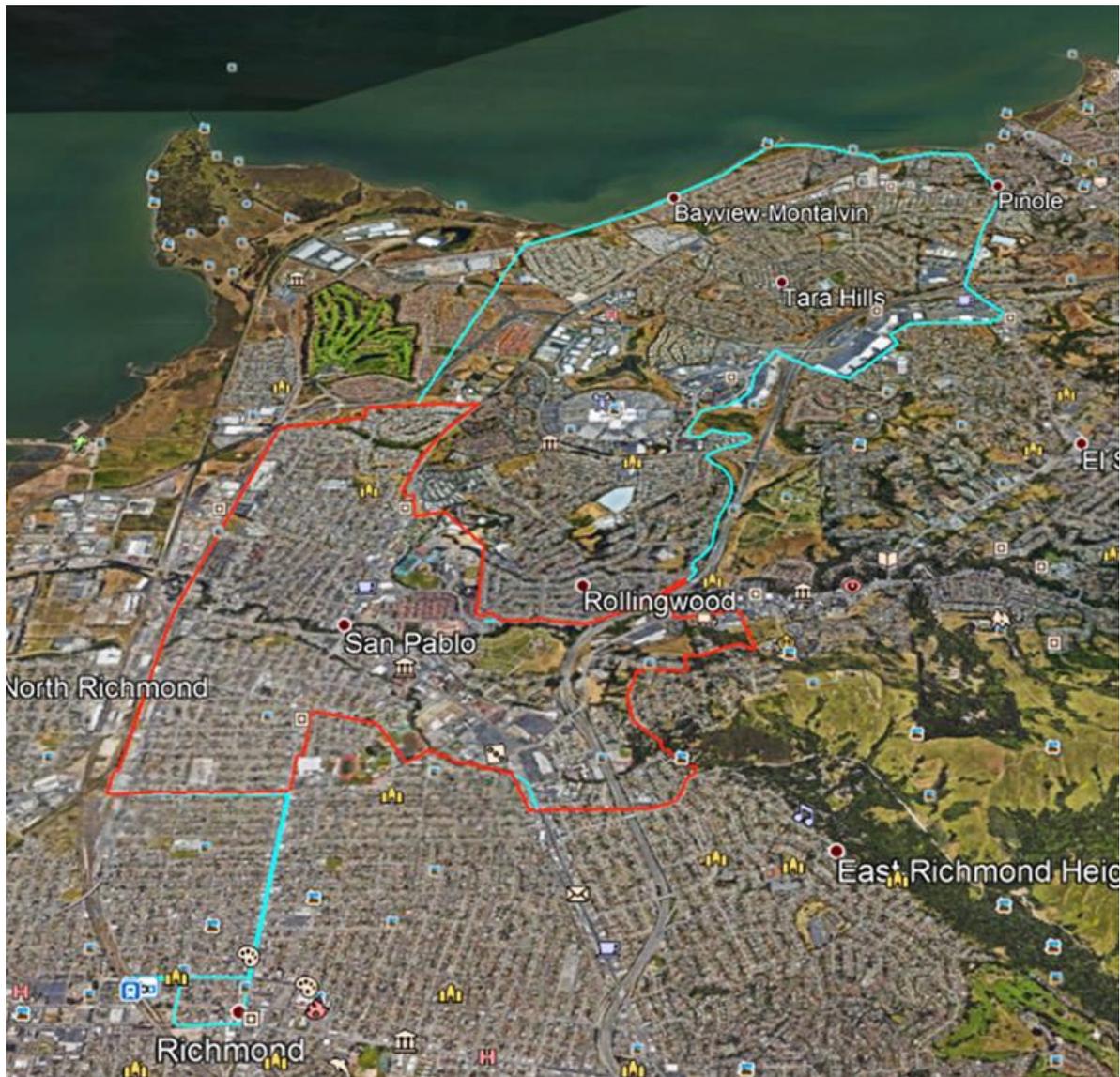
The vast majority of transportation requested is to medical facilities such as Martinez County Hospital, The VA Hospital in Martinez, Hercules Medi-Cal offices and a few to Kaiser Oakland Hospital, and Alta Bates Medical Center in Berkeley. Other areas requested by San Pablo locals include El Cerrito and Albany. This includes shopping malls, the DMV, and the Costco Warehouse in Richmond, which is not covered by our service.

We have requests to start our service as early as 7:30 am (Our first pick up is 9:00 am). We have much fewer ride requests after 2 pm. Most of the other request come from people unfamiliar with our service and are asking for rides in surrounding cities. We refer the, to other transit agencies.

12) Service Area: Please provide a map of the service area and tables to illustrate the data, as appropriate. Describe both who is geographically eligible to ride your service and where your service will take and pick up those eligible riders.

The City of San Pablo staff use the map below to determine eligibility. Anyone who applies and lives within the red zone is classified as a San Pablo resident. Anyone who applies and whose address falls within the blue line is considered a non-resident of Unincorporated San Pablo.

Reservations may be made for locations in the San Pablo region (inside red lines) as well as in select sections of Pinole and Richmond (between blue lines). Trips now run from Richmond Kaiser to Pinole Kaiser. Typically, travels do not extend beyond Kaiser in Pinole or Macdonald Avenue in Richmond. The most frequent destinations for San Pablo Transportation riders are Kaiser Pinole, Richmond, and West County Health Clinic.



13) Please share how you promote and market the programs you offer to potential new clients. Describe your outreach efforts in terms of Limited English Proficiency and Title VI. Attach your public-facing promotional materials, including your website address. Are your outreach materials available in languages other than English? If so, what languages?

We advertise our programs via social media, the city website, the senior center newsletter, local resident houses, and City publications such as the City Manager's weekly report, quarterly activity guide. Our information is in the Contra Costa Crisis Center, 211 providers' material and Comcast Cable Chanel 36 . Most of our outreach materials are in English and Spanish.

Please provide any additional information that you feel is unique or relevant to the transportation service that you provide to seniors or people with disabilities.

14) West County Operators Only Program 20b: Please describe how your agency will use program 20b funds (the amount your agency will receive is provided in the budget form). Note: It is the intent of the Measure J Transportation Expenditure Plan that Program 20b funds be used to provide “additional or new services” beyond what was previously provided under Measure C or “regular” service. If you previously started a new or additional service with these funds you can continue to use these funds to operate that service as long as it is productive.

SPSDT will continue providing Travel Training and social trips to the San Pablo community with 20b funding and ARPA funding. We are currently working with additional Measure X funds to expand service to the Martinez Medical Center to all those residing in the 94806 zip code.

Also, as ridership grows and more social trips are added, we would use the funding to hire a part-time driver as well as an administrative intern to help with administration to increase our capacity to provide services.



Driver Manifest - SanPablo
For Time Period: 5/31/2024

Printed: 5/30/2024 4:11:36PM

\$18 Tix
\$10 Cash

Vehicle: 0005

Run: Unassigned [8:45AM - 4:30PM]

Driver Name: L.J. KULLER

Driver Signature: Kuller

Date: 05-31-24

Time	Run Start	First Pickup	Last Dropoff	Run End	Break1 Start	Break1 End	Break2 Start	Break2 End
	08:30AM	09:15AM	03:00PM	04:30PM				
Odometer	59060	59062	59104	59106				

Stop Time	Customer Name	Stop Address	Conf. #	Request Time	Validation Information
-----------	---------------	--------------	---------	--------------	------------------------

8:45AM Earliest Pullout
 8:45AM Scheduled Pullout

San Pablo Fire Department
 13928 San Pablo Ave
 San Pablo, CA 94806

Stop Time
 Odometer

9:15AM SANDERS, SHAWN R
 1824 21ST STREET 14
 SAN PABLO, CA 94806

Pick Up (650) 642-7078

Customer Pay: \$2.00

18194 9:15AM P Stop Time
 Odometer

Cancellation
 No Show
 Complete

Attendants: 0 Guests: 0 Mobility: Ambulatory Assistance Need:

Fare Type: \$1 Ticket \$2 Cash \$2 Ticket \$4 Cash \$4 Ticket Assorted Check No Pay

9:18AM SANDERS, SHAWN R 551 23th St
 Drop Off (650) 642-7078 Richmond, CA 94801

Funding Source: Resident FY 21/22

18194 9:15AM P Stop Time
 Odometer

Attendants: 0 Guests: 0 Mobility: Ambulatory Assistance Need:

Funding Source: Resident FY 21/22

Vehicle: 0005 Run: Unassigned [8:45AM - 4:30PM] Driver Name: [-] For: 5/31/2024

Stop Time	Customer Name	Stop Address	Conf. #	Request Time	Validation Information
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9:30AM Break Start
 Stop Time: 09:30AM
 Odometer: 59069

9:40AM Break End
 Stop Time: 09:40AM
 Odometer: []

9:45AM BARTHMAN, MARK C 1271 Page Ct Pinole, CA 94564 22930 9:45AM P
 Stop Time: [] Cancellation:
 Pick Up (707) 366-5279 Odometer: [] No Show:
 Customer Pay: \$4.00 Complete:

Attendants: 0 Guests: 0 Mobility: Walker Assistance Need: Funding Source: Non - Resident FY 2

9:52AM BARTHMAN, MARK C 22930 9:45AM P
 Stop Time: [] Cancellation:
 Drop Off (707) 366-5279 West County Behavioral Health Center 13585 San Pablo Ave San Pablo, CA 94806 Odometer: [] No Show:
 Complete:

Attendants: 0 Guests: 0 Mobility: Walker Assistance Need: Funding Source: Non - Resident FY 2

10:00AM SEMPER, IRENE V 252 Michele Dr San Pablo, CA 94806 18264 10:00AM P
 Stop Time: [] Cancellation:
 Pick Up (510) 375-1178 Odometer: [] No Show:
 Customer Pay: \$0.00 Complete:

Comments: volunteer
 Fare Type: \$1 Ticket \$2 Cash \$2 Ticket \$4 Cash \$4 Ticket Assorted Check **No Pay**

DAILY VEHICLE INSPECTION Report

Vehicle No.	Date	Drivers Name	Start Miles	Start Time	End Miles	End Time
05	05/31/24	1 KULDIP KUMAR	59060	08:30AM	59106	04:30PM
		2				
		3				

4 = Satisfactory

7 = Unsatisfactory

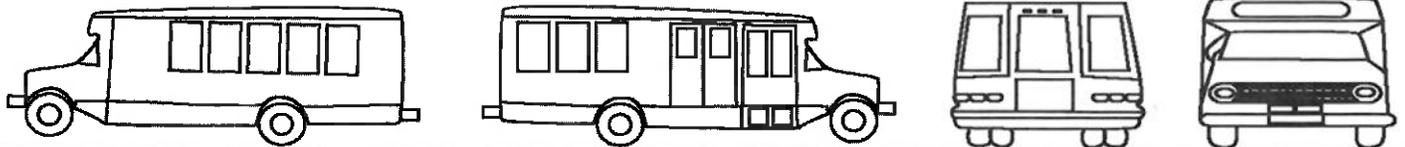
Inspection Item			Inspection item		
1	2	3	1	2	3
Tires and Wheels			Seats and cushions are secure		
4			4		
TIRE CONDITION, TREAD DEPTH AND AIR PRESSURE			Seat belts are complete, operational and secure		
4			4		
Wheels and rims for cracks, rips, welds or protruding objects.			2 way radio is complete and operational -RADIO CHECK		
4			4		
LUG NUTS TIGHT, NO EXCESSIVE RUST OR DAMAGE			WINDSHIELD WIPERS OPERATIONAL		
4			4		
Engine Compartment			Windshield washer operational		
4			4		
ENGINE OIL			HORN OPERATIONAL		
4			4		
AUTOMATIC TRANSMISSION FLUID			PASSENGER DOOR COMPLETE AND OPERATIONAL		
4			4		
COOLING SYSTEM LEVEL			Valid Registration present and visible		
4			4		
Windshield washer solution			Valid proof of insurance		
4			4		
BRAKE FLUID LEVEL			OTHER:		
4			4		
Power steering fluid level			Brakes		
4			4		
Battery terminals clean, no corrosion			BRAKE PEDAL FEELS GOOD AND STOPPING PROPERLY		
4			4		
Under vehicle leaks			PARKING BRAKE COMPLETE AND OPERATING PROPERLY		
4			4		
Vehicle Glass			Steering and Suspension System		
4			4		
Windshield has no chips or cracks			STEERING WHEEL SECURE, NO EXCESSIVE PLAY		
4			4		
MIRRORS ARE COMPLETE AND IN GOOD CONDITION			Gearshift mechanism tight and working properly		
4			4		
Windows complete			Safety Items		
4			4		
Emergency windows complete and operable			First aid kit, fully stocked and present		
4			4		
Vehicle Lighting			Triangle reflectors present and complete		
4			4		
HEADLIGHTS OPERATIONAL - HIGH AND LOW BEAM			FIRE EXTINGUISHER PRESENT, FULLY CHARGED		
4			4		
All Clearance lights operational & reflectors present			Vehicle accident packet present and accessible		
4			4		
BRAKE LIGHTS COMPLETE AND OPERATIONAL			Body fluid kit present and accessible		
4			4		
TURN SIGNALS COMPLETE AND OPERATIONAL			Wheelchair Lift		
4			4		
Backup lights complete and operational			Lift free from leakage		
4			4		
Backup alarm complete and audible			Lift operating properly electronically		
4			4		
EMERGENCY 4 WAY FLASHERS OPERATIONAL			Lift operating properly manually		
4			4		
Vehicle Interior Environment			LIFT INTERLOCK OPERATING PROPERLY		
4			4		
Front & rear air conditioner complete and operational			# of Lap Belts: 4 # of Tie Downs: 8		
4			4		
Front & Rear heater complete and operational					
4			4		
DEFROSTER COMPLETE AND OPERATIONAL					
4			4		
Interior					
4			4		
Clean					

Next PMS due is:

Quarts of oil added:

Gallons of fuel added:

Please explain in detail below any problems you are having with the vehicle and when the problem occurs.



. Any items in **bold** marked unsatisfactory must be brought to the attention of the Supervisor immediately. The **bold** typeface indicates items that place a vehicle out of service.

I declare that I have properly performed a vehicle inspection on the vehicle indicated above and have inspected and marked the inspection items, listed above, accordingly.

Driver's signature Pre Trip inspection ← Kuldip Kumar

There have been no incidents or accidents with this vehicle since the above signed inspection.

Driver's signature mid trip inspection ↑: _____

Driver's post trip inspection →: _____

- Reviewed
- Noted for repair
- Could not duplicate problem
- Repaired

Technicians Signature: _____

Shop Managers Signature: _____

Driver number 2, mid trip, only has to perform a walk around inspection. Only inspect items where a mark can be placed



San Pablo

SENIOR & DISABLED

Transportation

Are you a San Pablo Resident or living in Unincorporated San Pablo?
If so, register today!



• LOW-COST SERVICE • • FRIENDLY STAFF • • CONVENIENT • • QUICK & TIMELY SERVICE •

APPLICATION MUST BE APPROVED PRIOR TO RESERVATION

Contact us for more information.
Request an application
in person, by mail, email or
visit our website!

San Pablo Senior & Disabled
Transportation Service
is supported by
Contra Costa County Measure J Funds.

Main Office Address:
1943 Church Lane, San Pablo CA. 94806
Office Hours: Monday-Friday, 8:30am -
4:30pm

Main Office Phone Number:
(510) 215-3095

Main Email & Website:
paratransit@sanpabloca.gov
www.sanpabloca.gov/Transportation

Transporte

PARA PERSONAS MAYORES Y
DISCAPACITADAS DE

San Pablo



¿Es usted residente de San Pablo o vive en la zona no incorporada de San Pablo?
Si es así, ¡inscríbese hoy mismo!



• SERVICIO ECONÓMICO • • EMPLEADOS AMABLES • • CONVENIENTE • • SERVICIO RÁPIDO Y PUNTUAL •

LA APLICACIÓN DEBE SER APROBADA ANTES DE HACER LA RESERVACIÓN

Póngase en contacto con nosotros
para obtener más información.

Pida una aplicación en persona, por correo,
por correo electrónico o
visite nuestro sitio web!

El transporte de San Pablo
es apoyado por fondos
de la Medida J del condado de Contra Costa.

Dirección de la Oficina:

1943 Church Lane, San Pablo CA. 94806

Horario de oficina: Lunes a Viernes,
8:30AM - 4:30PM

Número de Teléfono de la Oficina:
(510) 215-3095

Correo Electrónico y Sitio Web:
paratransit@sanpabloca.gov
www.sanpabloca.gov/Transportation

TRANSPORTATION PROGRAM

TRANSPORTATION ELIGIBILITY

We are pleased to announce that the new shuttle service minimum age is 50 years old! New applicants must provide a government-issued ID or a utility bill with a picture ID to show residency. Please send your transit application and any accompanying documentation to our offices. Staff will notify you if you are eligible to participate in the program. Please contact us at (510) 215-3095 if you have any questions or concerns.

TRANSPORTATION APPLICATION

We have implemented our updated procedure for assessing eligibility for transportation. All riders must renew every year in the month of July. Applications must be accompanied by a utility bill or a government-issued photo ID to demonstrate residency. Currently filed applications are valid through June 2024. Please approach a member of the Paratransit team if you need assistance.

TRANSPORTATION RIDE COST

All subsequent rides require payment to use the transportation service. These are the fees:

Residents in San Pablo pay \$2.00.

Non-Resident (Resident of Unincorporated San Pablo): \$4.00

Fees must be paid to drivers upon pick up. You can buy a book of tickets to use for the fare.

DOOR TO DOOR TICKET PRICE

All tickets are sold at the San Pablo Senior Center, Monday-Friday, 8:30am-4:00pm

Payment may be made via cash, money order or personal check.

(No debit or credit cards accepted for payment)

Door to Door Shuttle Ticket Book (\$2 Tickets)	\$20.00 for 10 tickets per book
Door to Door Shuttle Ticket Book (\$4 Tickets)	\$40.00 for 10 tickets per book
Door to Door Shuttle Ticket Book (\$1 Tickets)	\$10.00 for 10 tickets per book
East Bay Paratransit Tickets	SOLD OUT (NO LONGER AVAILABLE)

SENIOR FOOD PROGRAM DELIVERY

MUST ENROLL AND BE APPROVED FOR THE SENIOR FOOD PROGRAM & SAN PABLO TRANSPORTATION

**San Pablo Transportation provides delivery service for seniors and disabled persons who are unable to pick up bag of food and delivered to their home.

Cost for home delivery: \$4 Res / \$6 Non-Res

Pickup at Senior Center: \$2 Res / \$3 Non-Res

1st & 3rd Friday of each month

San Pablo Library— Community Room (10:00AM-11:00AM)

To apply must attend food bank distribution days noted above.

For more info about the Senior Food Program contact 925-676-7543

FRIENDLY REMINDERS

Please Call

(510) 215-3095

for the following:

- Making a reservation can be done 1-3 days in advance. Same day is only available if there are cancellation.
- Changing your reservation you must call at least 1 day in advance
- Cancelling your reservation you must call at least 2 hours before scheduled ride

Please Remember:

- ◊ Have your fare ready at the time of your scheduled pick-up
- ◊ Be at the designated pick-up location on time
- ◊ Riders are given a 10-15 minute window for every reservation
- ◊ Drivers will only wait 5 minutes for rider
- ◊ Riders must be able to carry bags and packages on their own
- ◊ The service that is provided is a door-to-door shuttle service only



San Pablo Senior & Disabled Transportation
 1943 Church Lane
 San Pablo, CA 94806
 Email: paratransit@sampabloca.gov
www.sanpabloca.gov/seniors



2014

FRIENDLY REMINDERS

Please Call

(510) 215-3095

for the following:

- Making a reservation can be done 1-3 days in advance. Same day is only available if there are cancellation.
- Changing your reservation you must call at least 1 day in advance
- Cancelling your reservation you must call at least 2 hours before scheduled ride

Please Remember:

- ◊ Have your fare ready at the time of your scheduled pick-up
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San Pablo Senior & Disabled Transportation
 1943 Church Lane
 San Pablo, CA 94806
 Email: paratransit@sampabloca.gov
www.sanpabloca.gov/seniors



2014

FRIENDLY REMINDERS

Please Call

(510) 215-3095

for the following:

- Making a reservation can be done 1-3 days in advance. Same day is only available if there are cancellation.
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- ◊ Riders must be able to carry bags and packages on their own
- ◊ The service that is provided is a door-to-door shuttle service only



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 1943 Church Lane
 San Pablo, CA 94806
 Email: paratransit@sampabloca.gov
www.sanpabloca.gov/seniors



2014

RECORDATORIO AMISTOSO

Por favor llama

(510) 215-3095

para lo siguiente:

Reservación de viaje:
llama con 1 a 3 días de antelación.

*Viajes el mismo día solo están disponibles si hay cancelaciones.

Cambio de reserva:
llame con al menos un día de antelación.
Cancelar su reservación:
al menos 2 hora antes del viaje.

Por Favor Recuerde:

- ◇ Tener la tarifa lista al momento de su viaje
 - ◇ Estar en el designado ubicación a tiempo
 - ◇ A los pasajeros se les da una ventana de 10 a 15 minutos por cada reservación
- Los conductores solo esperarán 5 minutos para los pasajeros
- ◇ Los pasajeros deben poder cargar sus propia bolsas y paquetes por su cuenta
 - ◇ Nuestro servicio es puerta a puerta, no de puerta dentro la puerta

San Pablo Senior & Disabled Transportation

1943 Church Lane
San Pablo, CA 94806

Email: paratransit@sanpabloca.gov
www.sanpabloca.gov/seniors



2014

RECORDATORIO AMISTOSO

Por favor llama

(510)215-3095

Para lo siguiente:

• Hacer una reserva de viaje: llama con uno a tres días de antelación.

*Viajes el mismo día solo están disponibles si hay cancelaciones.

• Cambio de reserva: llame con al menos un día de antelación.
• Cancelación: al menos 1 hora antes del viaje.

Por Favor Recuerde:

- ◇ Tener la tarifa lista al momento de su viaje
- ◇ Para estar en el pick-up designado ubicación y llegar a tiempo
- ◇ A los pasajeros se les da una ventana de 10 a 15 minutos por cada recogida.
- ◇ Los conductores solo esperarán 5 minutos para los pasajeros.
- ◇ Los pasajeros deben poder llevar bolsas y paquetes por su cuenta.
- ◇ Que esto es una puerta a puerta, no Servicio de puerta a puerta.

San Pablo Senior & Disabled Transportation

1943 Church Lane
San Pablo, CA 94806

Email: paratransit@sanpabloca.gov
www.sanpabloca.gov/seniors



2014

RECORDATORIO AMISTOSO

Por favor llama

(510)215-3095

Para lo siguiente:

• Hacer una reserva de viaje: llama con uno a tres días de antelación.

* Viajes el mismo día solo están disponibles si hay cancelaciones.

• Cambio de reserva: llame con al menos un día de antelación.
• Cancelación: al menos 1 hora antes del viaje.

Por Favor Recuerde:

- ◇ Tener la tarifa lista al momento de su viaje
- ◇ Para estar en el pick-up designado ubicación y llegar a tiempo
- ◇ A los pasajeros se les da una ventana de 10 a 15 minutos por cada recogida.
- ◇ Los conductores solo esperarán 5 minutos para los pasajeros.
- ◇ Los pasajeros deben poder llevar bolsas y paquetes por su cuenta.
- ◇ Que esto es una puerta a puerta, no Servicio de puerta a puerta.

San Pablo Senior & Disabled Transportation

1943 Church Lane
San Pablo, CA 94806

Email: paratransit@sanpabloca.gov
www.sanpabloca.gov/seniors



2014

We want to hear from you!



Help shape how we meet the needs of seniors and disabled adults in our community while supporting their caregivers.

Participate in a focus group to help develop Contra Costa County's 2024-28 Area Plan on Aging.

The Area Agency on Aging (AAA) wants to hear from:

- Seniors age 60+
- Adults with disabilities age 18-59
- Family or informal caregivers

See back for the full list of Focus Group Sessions.

- Face coverings will be provided.
- Emergency Preparedness Kit voucher for each participant.
- Find out if you qualify for a free iPad with service plan.
- Light refreshments will be served.

Questions

Call (925) 655-0774 or visit ehsd.org

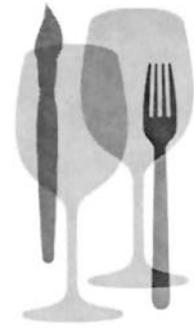
Area Agency on Aging

A Division of Aging & Adult Services





DOWNTOWN ALAMEDA
ART & WINE FAIRE
 July 29 & 30, 2023



\$10 Members & \$15 Non-Members

Boarding (San Pablo Town Center, 2415 San Pablo Dam Rd)	11:15AM
Departure (San Pablo Town Center, 2415 San Pablo Dam Rd)	11:30AM
Arrival (Downtown Alameda)	12:00PM
Boarding (Downtown Alameda)	4:45PM
Departure (Downtown Alameda)	5:00PM
Arrival (San Pablo Town Center, 2415 San Pablo Dam Rd)	5:30PM

**SPACE IS LIMITED. 10 PEOPLE MAX
 ACCESSIBLE TO 1 MOBILITY DEVICE.
 MUST NOTIFY STAFF WHEN SIGNING UP**

Senior Center Division • 1943 Church Ln, San Pablo, CA, 94806
 Phone 510-215-3090 • Fax 510-215-3015 • Seniors@sanpabloca.gov





Saturday, August 19

FENTON'S & CON FUNK SHUN CONCERT

\$30 Members & \$ 35 Non-Members

ITINERARY	LOCATION	TIME
Boarding	San Pablo Town Center	2:15PM
Departure	San Pablo Town Center	2:30PM
Arrival	Fenton's Vacaville	4:00PM
Boarding	Con Funk Shun Concert	6:00PM
Arrival	Con Funk Shun Concert	6:10PM
Departure	San Pablo Town Center	9:00PM
Arrival	San Pablo Town Center	10:30PM

**SPACE IS LIMITED. 10 PEOPLE MAX | LUNCH IS NOT INCLUDED | CONCERT TICKET IS INCLUDED
ACCESSIBLE TO 1 MOBILITY DEVICE.
MUST NOTIFY STAFF WHEN SIGNING UP**

Senior Center Division • 1943 Church Ln, San Pablo, CA, 94806
Phone 510-215-3090 • Fax 510-215-3015 • Seniors@sanpabloca.gov

SF Ferry & Ferry Building

Thursday, August 24th



\$15 Members & \$20 Non-Members

ITINERARY	LOCATION	TIME
Boarding	San Pablo Town Center	9:45AM
Departure	San Pablo Town Center	10:00AM
Arrival	Richmond Ferry Terminal	10:15AM
Arrival	SF Ferry building	11:15AM
Departure	SF Ferry Terminal	4:00PM
Arrival	San Pablo Town Center	5:30PM

**SPACE IS LIMITED. 10 PEOPLE MAX | LUNCH IS NOT INCLUDED | FERRY TICKET IS INCLUDED
ACCESSIBLE TO 1 MOBILITY DEVICE.
MUST NOTIFY STAFF WHEN SIGNING UP**

Senior Center Division • 1943 Church Ln, San Pablo, CA, 94806
Phone 510-215-3090 • Fax 510-215-3015 • Seniors@sanpabloca.gov



Tuesday, September 19th 2023

\$10 Members & \$15 Non-Members

Boarding (San Pablo Town Center, 2415 San Pablo Dam Rd)	11:15AM
Departure (San Pablo Town Center, 2415 San Pablo Dam Rd)	11:30AM
Arrival (Walmart Supercenter)	12:15PM
Arrival (Red Lobster)	2:30PM
Departure (San Pablo Town Center, 2415 San Pablo Dam Rd)	4:30PM
Arrival (San Pablo Town Center, 2415 San Pablo Dam Rd)	5:00PM

**SPACE IS LIMITED. 10 PEOPLE MAX . LUNCH IS NOT INCLUDED
ACCESSIBLE TO 1 MOBILITY DEVICE.
MUST NOTIFY STAFF WHEN SIGNING UP**

**Senior Center Division • 1943 Church Ln, San Pablo, CA, 94806
Phone 510-215-3090 • Fax 510-215-3015 • Seniors@sanpabloca.gov**

SAFEWAY  PRESENTS



HALF MOON BAY
51st
Art & PUMPKIN
ESTD FESTIVAL 1971

OCTOBER 14th & 15th

MEMBERS: \$20 & NON-MEMBERS: \$25

Boarding (San Pablo Town Center, 2415 San Pablo Dam Rd)	8:00AM
Departure (San Pablo Town Center, 2415 San Pablo Dam Rd)	8:15AM
Arrival (Art & Pumpkin Festival, Half Moon Bay)	9:30AM
Departure (San Pablo Town Center, 2415 San Pablo Dam Rd)	4:30PM
Arrival (San Pablo Town Center, 2415 San Pablo Dam Rd)	5:45PM

SPACE IS LIMITED. 10 PEOPLE MAX

ACCESSIBLE TO 1 MOBILITY DEVICE.

MUST NOTIFY STAFF WHEN SIGNING UP

**Senior Center Division • 1943 Church Ln, San Pablo, CA, 94806
Phone 510-215-3090 • Fax 510-215-3015 • Seniors@sanpablocga.gov**

TRAVEL TRAINING ORIENTATION



WHEN:
August 3rd, 2023
10:00AM - 11:00AM

WHERE:
San Pablo Senior Center
1943 Church Lane

SIGN UP
Call - 510-215-3090—Space is Limited

**SAN PABLO
SENIOR & DISABLED
TRANSPORTATION**

**WCCTAC
PRESENTATION**

ATTEND

Learn of the different
forms of transportation
available & what
resources are available

BENEFITING

You.
Your Freedom.
Your Independence.

Come & Join

To attend Travel Training
trips must attend travel
training orientation.

Please Note:

Those who have previously
attend do not need to
attend again.



**CHECK OUR NEWSLETTER FOR THE NEXT
TRAVEL TRAINING TRIPS!**

Standing Committee & Council Presentations

PARATRANSIT SERVICES

MONTH	DOOR TO DOOR	BROWN BAG
SEPTEMBER	RIDERSHIP BREAKDOWN RESIDENT : 361 NON-RESIDENT: 53 TOTAL: 414	SENIOR FOOD PROGRAM DELIVERY RESIDENT: 34 NON-RESIDENT: 6 TOTAL: 40
OCTOBER	RIDERSHIP BREAKDOWN RESIDENT : 406 NON-RESIDENT: 60 TOTAL: 466	SENIOR FOOD PROGRAM DELIVERY RESIDENT: 34 NON-RESIDENT: 6 TOTAL: 40
NOVEMBER	RIDERSHIP BREAKDOWN RESIDENT : 24 NON-RESIDENT: 162 TOTAL: 186	SENIOR FOOD PROGRAM DELIVERY RESIDENT: 34 NON-RESIDENT: 6 TOTAL: 40
DECEMBER	RIDERSHIP BREAKDOWN RESIDENT : N/A NON-RESIDENT: N/A TOTAL: N/A	SENIOR FOOD PROGRAM DELIVERY RESIDENT: 34 NON-RESIDENT: 6 TOTAL: 40

MONTH	SOCIAL TRIP	NUMBER OF PARTICIPANTS
SEPTEMBER	FAIRFIELD WALMART & RED LOBSTER	10
SEPTEMBER	PITTSBURG SEAFOOD & MUSIC FESTIVAL	10
OCTOBER	HALF MOON BAY PUMPKIN FESTIVAL	13

MONTH	PROGRAM	NUMBER OF PARTICIPANTS
DECEMBER	FAMILY GIVING TREE GIFT DELIVERY	50



SENIOR & PARATRANSIT DIVISIONS

Events and Trips

September 2023

- Latin Independence Luncheon: Friday, September 15, 2023

October 2023

- CC County Focus Group Presentation: Friday, October 13, 2023
- Bingo Blowout: Saturday, October 28, 2023
- Halloween Tea Dance: Monday, October 30, 2023

November

- Medicare Open Enrollment Talk: Tuesday, November 14, 2023
- Thanksgiving Dinner: Tuesday, November 14, 2023

Trips

- Monthly Casino Trips: Hard Rock (9/29) & Cache Creek (10/27)
- Social Trips: Fairfield Walmart & Red Lobster (9/19), Half Moon Bay Art & Pumpkin Festival (10/14 & 10/15)

Upcoming

- Holiday Luncheon Thursday, December 14, 2023
- New Year's Dance Monday, January 8, 2024
- Chinese New Year Luncheon Friday, February 9, 2024
- Valentine's Day Luncheon Wednesday, February 14, 2024
- Black History Celebration Luncheon Thursday, February 29, 2024



General Ledger
Summary Trial Balance

FY24 - May 2024

User: Cecilian
Printed: 06/20/2024 - 11:11AM
Period: 01 to 11, 2024



Account Number	Description	Budget Amount	Beginning Balance	Debit This Period	Credit This Period	Ending Balance
Fund 263	Paratransit					
ASSETS						
263-0000-10199	Cash Balance	0.00	610,784.29	468,859.41	330,903.93	748,739.77
263-0000-10400	Interest Receivable LAIF	0.00	0.00	0.00	0.00	0.00
263-0000-11510	Accounts Receivable/General	0.00	33,145.40	0.00	33,145.40	0.00
263-0000-12600	Due From Other Governments	0.00	0.00	0.00	0.00	0.00
	ASSETS Totals:	0.00	643,929.69	468,859.41	364,049.33	748,739.77
LIABILITIES						
263-0000-20200	Accounts Payable	0.00	-117.49	35,455.68	35,338.19	0.00
	LIABILITIES Totals:	0.00	-117.49	35,455.68	35,338.19	0.00
FUND BALANCE						
263-0000-24500	Reserve for PY Encumbrances	0.00	0.00	0.00	0.00	0.00
263-0000-25320	Fund Balance Unreserved	0.00	-643,812.20	12,954.05	12,954.05	-643,812.20
	FUND BALANCE Totals:	0.00	-643,812.20	12,954.05	12,954.05	-643,812.20
REVENUE						
263-0000-33509	Paratransit Measure J	283,923.00	0.00	0.00	382,676.10	-382,676.10
263-0000-33704	MTC Fare Box	0.00	0.00	0.00	0.00	0.00
263-0000-36102	Interest	0.00	0.00	0.00	14,997.90	-14,997.90
263-0000-36107	GASB31 Market Value Adjustment	0.00	0.00	0.00	12,954.05	-12,954.05
263-0000-39202	Sale of vehicles	0.00	0.00	0.00	0.00	0.00
263-0000-39999	Transfers In	0.00	0.00	0.00	0.00	0.00
Dept 5410	Paratransit					
263-5410-33704	MTC Fare Box	10,000.00	0.00	56.00	9,257.76	-9,201.76
263-5410-39906	Other Revenue	0.00	0.00	0.00	0.00	0.00

Account Number	Description	Budget Amount	Beginning Balance	Debit This Period	Credit This Period	Ending Balance
	263-5410 REVENUE Totals:	10,000.00	0.00	56.00	9,257.76	-9,201.76
	REVENUE Totals:	293,923.00	0.00	56.00	419,885.81	-419,829.81
EXPENSE						
Dept 5410	Paratransit	206,555.72	0.00	190,802.09	0.00	190,802.09
263-5410-41000	Salary	0.00	0.00	16,189.72	0.00	16,189.72
263-5410-41001	Part Time Salary	0.00	0.00	0.00	0.00	0.00
263-5410-41105	Workers Compensation	0.00	0.00	15,500.93	0.00	15,500.93
263-5410-41200	PERS Retirement	0.00	0.00	209.59	0.00	209.59
263-5410-41205	PARS Retirement	47,087.76	0.00	43,425.35	0.00	43,425.35
263-5410-41310	Medical Insurance	2,640.00	0.00	1,525.00	0.00	1,525.00
263-5410-41312	Retiree Health Savings Plan	6,741.01	0.00	3,643.54	0.00	3,643.54
263-5410-41400	Dental Insurance	1,395.00	0.00	0.00	0.00	0.00
263-5410-41500	Flexible Spending Account	3,726.27	0.00	1,400.65	0.00	1,400.65
263-5410-41800	LTD Insurance	2,995.06	0.00	2,891.06	0.00	2,891.06
263-5410-41900	Medicare	0.00	0.00	0.00	0.00	0.00
263-5410-41903	Employee Assistance Program	517.82	0.00	401.21	0.00	401.21
263-5410-41904	Life Insurance	0.00	0.00	240.00	0.00	240.00
263-5410-41905	Benefits in Lieu	0.00	0.00	850.40	0.00	850.40
263-5410-41990	Other Benefits	1,545.00	0.00	0.00	0.00	0.00
263-5410-42000	Uniforms	2,163.00	0.00	2,343.73	0.00	2,343.73
263-5410-42001	Communications	8,758.00	0.00	14,604.27	0.00	14,604.27
263-5410-42005	Network Applications/Expenses	11,021.00	0.00	10,566.71	2,874.15	7,692.56
263-5410-43000	Vehicle, Equipt Maint & Repair	13,792.00	0.00	9,560.09	0.00	9,560.09
263-5410-43100	Gasoline / Diesel Fuel	567.00	0.00	0.00	0.00	0.00
263-5410-43300	Memberships/Subscriptions	3,723.00	0.00	2,264.56	0.00	2,264.56
263-5410-43500	Program Costs & Supplies	2,060.00	0.00	0.00	0.00	0.00
263-5410-43510	Meeting & Sundry Supplies	2,215.00	0.00	640.58	0.00	640.58
263-5410-43520	Copies/Printing/Shipping/Xerox	3,090.00	0.00	389.07	0.00	389.07
263-5410-43550	Central Office Supplies	849.00	0.00	247.00	0.00	247.00
263-5410-44100	Pre-Employment Expenses	4,901.00	0.00	80.84	0.00	80.84
263-5410-44320	Travel/Training Staff					
	263-5410 EXPENSE Totals:	342,168.89	0.00	317,776.39	2,874.15	314,902.24
	EXPENSE Totals:	342,168.89	0.00	317,776.39	2,874.15	314,902.24

Benefit Salary 2776

GL-Summary Trial Balance (6/20/2024 - 10:11 AM) 2784 - 1407 80007 Page 2

General Ledger

Summary Trial Balance

FY 23
Final

User: Cecilia N
 Printed: 06/20/2024 - 10:29AM
 Period: 01 to 13, 2023



Account Number	Description	Budget Amount	Beginning Balance	Debit This Period	Credit This Period	Ending Balance
Fund 263	Paratransit					
ASSETS						
263-0000-10199	Cash Balance	0.00	530,761.03	412,712.62	332,689.36	610,784.29
263-0000-10400	Interest Receivable LAIF	0.00	0.00	0.00	0.00	0.00
263-0000-11510	Accounts Receivable/General	0.00	9,061.00	33,145.40	9,061.00	33,145.40
263-0000-12600	Due From Other Governments	0.00	0.00	0.00	0.00	0.00
	ASSETS Totals:	0.00	539,822.03	445,858.02	341,750.36	643,929.69
LIABILITIES						
263-0000-20200	Accounts Payable	0.00	-6,942.36	24,921.70	18,096.83	-117.49
	LIABILITIES Totals:	0.00	-6,942.36	24,921.70	18,096.83	-117.49
FUND BALANCE						
263-0000-24500	Reserve for PY Encumbrances	0.00	0.00	0.00	0.00	0.00
263-0000-25320	Fund Balance Unreserved	0.00	-532,879.67	12,021.69	12,021.69	-532,879.67
	FUND BALANCE Totals:	0.00	-532,879.67	12,021.69	12,021.69	-532,879.67
REVENUE						
263-0000-33509	Paratransit Measure J	275,653.00	0.00	0.00	393,985.60	-393,985.60
263-0000-33704	MTC Fare Box	0.00	0.00	0.00	32.00	-32.00
263-0000-36102	Interest	0.00	0.00	203.26	11,543.75	-11,340.49
263-0000-36107	GASB31 Market Value Adjustment	0.00	0.00	24,975.74	24,043.38	932.36
263-0000-39202	Sale of vehicles	0.00	0.00	0.00	0.00	0.00
263-0000-39999	Transfers In	0.00	0.00	0.00	0.00	0.00
Dept 5410	Paratransit					
263-5410-33704	MTC Fare Box	10,000.00	0.00	78.00	16,011.45	-15,933.45
263-5410-39906	Other Revenue	0.00	0.00	0.00	2,516.00	-2,516.00

Account Number Description Budget Amount Beginning Balance Debit This Period Credit This Period Ending Balance

263-5410 REVENUE Totals: 10,000.00 0.00 78.00 18,527.45 -18,449.45

REVENUE Totals: 285,653.00 0.00 25,257.00 448,132.18 -422,875.18

EXPENSE

Dept 5410 Paratransit 189,925.47 0.00 212,375.23 0.00 212,375.23

263-5410-41000 Salary 0.00 0.00 0.00 0.00 0.00

263-5410-41105 Workers Compensation 14,495.96 0.00 16,526.61 0.00 16,526.61

263-5410-41200 PERS Retirement 43,606.96 0.00 46,498.89 0.00 46,498.89

263-5410-41310 Medical Insurance 0.00 0.00 1,575.00 0.00 1,575.00

263-5410-41312 Retiree Health Savings Plan 6,128.33 0.00 4,331.10 0.00 4,331.10

263-5410-41400 Dental Insurance 1,395.00 0.00 0.00 0.00 0.00

263-5410-41500 Flexible Spending Account 3,426.26 0.00 1,821.77 0.00 1,821.77

263-5410-41800 LTD Insurance 2,753.92 0.00 2,974.24 0.00 2,974.24

263-5410-41900 Medicare 0.00 0.00 172.62 34.20 138.42

263-5410-41903 Employee Assistance Program 517.82 0.00 523.59 0.00 523.59

263-5410-41904 Life Insurance 0.00 0.00 240.00 0.00 240.00

263-5410-41905 Benefits in Lieu 0.00 0.00 1,018.35 0.00 1,018.35

263-5410-41990 Other Benefits 1,500.00 0.00 0.00 0.00 0.00

263-5410-42000 Uniforms 2,100.00 0.00 1,832.53 0.00 1,832.53

263-5410-42001 Communications 8,502.00 0.00 2,963.92 0.00 2,963.92

263-5410-43000 Network Applications/Expenses 10,700.00 0.00 2,674.99 465.48 2,209.51

263-5410-43000 Vehicle, Equipt Maint & Repair 13,390.00 0.00 11,305.43 0.00 11,305.43

263-5410-43100 Gasoline / Diesel Fuel 550.00 0.00 615.00 0.00 615.00

263-5410-43300 Memberships/Subscriptions 3,615.00 0.00 3,333.76 186.85 3,146.91

263-5410-43500 Program Costs & Supplies 2,000.00 0.00 0.00 0.00 0.00

263-5410-43510 Meeting & Sundry Supplies 2,150.00 0.00 603.63 0.00 603.63

263-5410-43520 Copies/Printing/Shipping/Xerox 3,000.00 0.00 670.70 0.00 670.70

263-5410-43550 Central Office Supplies 824.00 0.00 0.00 0.00 0.00

263-5410-44100 Pre-Employment Expenses 4,758.00 0.00 571.82 0.00 571.82

263-5410-44320 Travel/Training Staff 315,338.72 0.00 312,629.18 686.53 311,942.65

263-5410 EXPENSE Totals: 315,338.72 0.00 312,629.18 686.53 311,942.65

EXPENSE Totals: 315,338.72 0.00 312,629.18 686.53 311,942.65

Fund 263 Totals: -29,685.72 0.00 820,687.59 820,687.59 0.00

Handwritten: **Final!**

Handwritten: **Ending FY 23 Balance \$ 643,811.20**



CONTRA COSTA
transportation
authority

Measure J Paratransit Program 15 Claim FY 24-25 Project Description

Claimant/Agency: WCCTA aka WestCAT

Project Description:

1) If your claim will be used, entirely or in part, to operate a vehicle that provides service to seniors and/or persons with disabilities, please provide:

a) Brief Paratransit System History

WCCTA Dial A Ride service began in September 1979, serving the Cities of Hercules and Pinole and the unincorporated communities of Crockett, Rodeo, Port Costa, Tara Hills, Montalvin Manor, and Bayview in Western Contra Costa County. WestCAT's commitment to providing service to riders with disabilities pre-dates the passage of the Americans with Disabilities Act. WCCTA has offered direct trips within and outside its service boundaries for passengers with disabilities for many years, and our system continues to offer services beyond the scope necessary under the ADA. Eligibility for these services is extended to anyone 65 years or older, regardless of ADA eligibility status.

b) Types of service: *Check the box for each type of service you provide, and for each, provide a description of the service, including a system overview, how the service is delivered (contracted, in-house), driver training, how service is monitored for effectiveness, ~~how the service is marketed~~, fares, etc. Include attachments if appropriate.*

xx Paratransit Service:

Taxi/TNC:

Excursion Service:

Meal trips:

xx Dial-A-Ride:

Volunteer Driver Program:

Other:

WestCAT Paratransit Service operates six days a week, from 6:00 AM to 8:00 PM (weekdays) and from 9:00 AM to 7:00 PM on Saturdays. The service provides the ADA-mandated complementary service for WestCAT's fixed route system, though WestCAT does not limit service to a $\frac{3}{4}$ mile corridor boundary around operating fixed routes but instead provides service to all locations within its service area boundaries during paratransit hours of operation. Outside of these hours, and on Sundays and Holidays, WestCAT has a cooperative agreement with East Bay Paratransit to provide ADA-mandated services. At these times, locations served are limited to those within the $\frac{3}{4}$ mile

ADA corridor.

2) Budgets & Staffing: Complete attached Budget Spreadsheets

- a) Budget: If your agency received Measure J Program 15 funds in the past 3 years and did not spend the entire allocation ~~due to service reductions related to COVID please indicate the amounts in the spreadsheet~~ and for any reason, provide details here for how the funds will be spent. NOTE: Any funds must be spent in support of the agency's program to provide transportation services to seniors and people with disabilities.

WCCTA continued to provide paratransit services throughout the pandemic and has expended all the Measure J funding allocated through Programs 15 and 20 in each operating year, supplementing this funding using the Transportation Development Act and Federal Transit Administration allocations.

- b) Staffing: Please complete the table below.

Position		Full Time	Part Time	Total FTEs	Total PTEs
Drivers		6	1	6	1
Dispatch		5		5	
Admin		1	.5	1	.5
Other	Mech/Svc.	2		2	

- c) Staffing: For 'Admin' and 'Other' staffing positions noted in the above chart, please provide a brief description of the functions performed.

Mechanic / Utility Workers are responsible for maintaining the paratransit fleet. They service and clean our vehicles to ensure they are in good shape to operate our service safely.

Admin is responsible for overseeing the paratransit and ADA passenger database. Keeping up with eligibility, registering new clients, incoming applications, and reservations.

- d) Staffing: If your program expends Measure J Program 15 funds for personnel who are not actively engaged in the delivery of services, please explain.

n/a

3) Training: What initial training is provided to staff (admin and drivers) when they become part of your service team? What ongoing training or certification does your staff participate in to qualify them to do the job (admin and drivers)?

Using MV Transportation's instructor-guided program, drivers are provided with classroom and behind-the-wheel training. The training covers 33 core training modules covering all necessary components of safe and courteous vehicle operation. Each new hire is required to complete 116 hours of training. Consists of 28.5 hours of classroom, 4.5 hours of pre-driving, 6 hours of closed course, 25.5 hours of behind-the-wheel training, 36 hours of observation, and 16 hours of cadet driving.

- a) What training do Customer Service staff receive? Attach training curriculum if you have it.

Customer Service/ Dispatchers all receive the same training as above, along with ongoing training regarding booking appointments, hold times, empathy, and call-doctor.

- 4) Liability & Testing: What insurance liabilities do you have to protect staff and passengers?

WCCTA maintains its primary Vehicular and General Liability Coverage through the California Transit Indemnity Pool (CalTIP). Currently, WCCTA's self-insured retention level under the CalTIP coverage is \$100,000, and WCCTA currently maintains coverage for the first \$100,000 of any loss through its contract with MV Transportation. The CalTIP program requires that all incidents and potential losses be immediately reported to CalTIP's third-party adjusting firm (currently Sedgwick) and that CalTIP's TPA will be responsible for administering all covered claims. WCCTA also secures physical damage coverage for the full replacement value of all vehicles in its fleet through CalTIP. Proposers shall provide coverage for all physical damage losses within the deductible amount of the CalTIP coverage (\$5,000 per occurrence per vehicle). CalTIP's third-party adjusting firm is responsible for administering any physical damage claim and for pursuing subrogation recovery for any physical damage claim exceeding \$2,500.

- a) Are staff subject to drug and alcohol testing. If so, under what circumstances?

Yes, all safety-sensitive employees are drug tested upon employment, after at-fault accidents, for reasonable suspension, and randoms.

- b) How are accidents and incidents handled? Is specialized training or materials provided to staff?

When needed, the Road Supervisors respond to all Accidents/Incidents. Road Supervisors and Managers received Accident Investigation Training upon initial placement and receive ongoing training regarding investigation, reporting, and testing.

CalTIP also provides accident investigation training, which we use frequently.

Key personnel are provided with the needed materials (Incident, FTA Decision to Test, Preventability, Testing Notification, Comment Cards), as well as other forms. Everyone responding to incidents has a Smartphone for photos.

- 5) If your claim will be used, entirely or in part, to provide a program other than operating a vehicle, please provide the following:

- a) Brief description of the program, including a brief history of the program, who the program serves, reason for the program, marketing efforts, etc.

n/a

- b) If the program includes subsidizing paratransit or taxi or other ride-

hailing service (Uber, Lyft, etc.) fares, please include the amount of the subsidy and explain in detail how your program works. Include a service area map of what zones you pick up in and what zones you drop off in. Please include any marketing materials you distribute and discuss how people learn about your program. Explain how people order a trip. If you serve pick-up locations outside your city, please list the number of pick-ups each month you provided to these “outside” areas.

n/a

- c) In these programs, how do you ensure that mobility aid users and ambulatory customers have equivalent access and service reliability?

n/a

- 6) Please provide a brief description of how your agency solicits feedback from passengers and potential passengers about your service (i.e., surveys, comment cards, customer service logs).

- a) How do you utilize that input to inform and improve your program?

Passengers are encouraged to address their comments and any concerns they may have directly to the Board (either at a regularly scheduled public meeting of the Board or in writing). In addition, they may speak directly with WestCAT’s General Manager. WestCAT also has an online portal for submitting service requests, complaints, comments, or questions. WestCAT staff participates in Mobility Management working groups and workshops attended by existing and prospective passengers.

- b) Do you have a committee of residents that meets to discuss your program? Explain how often this group meets and how it is staffed.

NO

- 7) How do you record and track customer complaints? What procedures do you have in place to resolve them?

WestCAT uses software provided by GoGov to record and track all complaints/comments. Using the online portal, passengers can go directly to our website to report complaints or call us. Once a comment has been received, they are directed to a specific person, depending on the issue, to investigate and respond within 3 business days.

- a) What customer service metrics do you track: ie Phone hold times, late/early pick-ups, fare disputes, loading problems, etc. How are these metrics trending year over year?

WestCAT tracks call hold times, including reservation calls for training purposes, late/early pick-ups, on-time performance, and yard pull times. The monthly goal for on-time performance must stay above 95% to be considered satisfactory.

b) If you have vendors delivering service on your behalf, what procedures do you have in place to gather and resolve complaints they receive.

All complaints are tracked on WCCTA's GoGov software.

8) Please describe how your service is monitored and what criteria you use. Include tools you use to monitor performance, frequency of monitoring and reports generated. Include samples of reports from software used by your agency.

All paratransit activity is tracked through the agency's Trapeze scheduling database, which generates performance reports. Additionally, vehicles are equipped with GPS-enabled tablets that track vehicle location and aid dispatchers in identifying and reacting to any performance issues in real-time. Each vehicle also has an onboard camera and monitoring system that can help with driver training and safety issues.

All operating data is entered into the TransTrack third-party monitoring program, which tracks all the information that must be reported into the National Transit Database (NTD). WestCAT staff is responsible for extracting this information from TransTrack and preparing and submitting quarterly reports to NTD. This serves as a regular check on contractor performance and any emerging trends.

The contractor is required to prepare and submit a monthly management report to WestCAT at the close of each operating month, summarizing operating data on key indicators (passengers, miles operated, service hours, fare revenue, accidents, etc)

a) Please include the key performance indicators you use to measure the success of your program in the chart below. (Example: cost per passenger, on-time performance, complaints)

Metric	Goal	Prior FY	FY YTD
On-Time Performance	93%	92.40%	94.34 %
Passengers per Hour	2.3	1.97	2.1
Miles between accidents	50,000	101,107	50,000
Trip Denials	0	0	0
Cost per Rv/Hr	160.00	164.04	168.96

b) If services have degraded per the performance metrics reported, what were the reasons, and what actions are you taking to improve service?

9) Please describe how, and with what frequency, your policy makers (Board or Council) review operating budget and performance of the service you provide. Do you submit an annual report to bring your Board or Council? Please include that document in this claim.

The WestCAT Board of Directors is scheduled to meet every month, and staff provide a standard format report summarizing operating data, ridership, and productivity 12 times per year. Staff present the budget for the upcoming fiscal year (July to June) before the beginning of the new year once funding levels from all key sources are known. This presentation outlines operational and capital for the budget year and past actual budget performance. A short-range transit plan is prepared and presented to the Board of Directors for approval every 2 to 3 years, outlining 10-year revenue assumptions and anticipated demographic and service needs in response to demographic and development changes.

10) How many people are registered in your client database now? How many unincorporated area residents does this include? How often do you review and update this database to reflect changes in client eligibility or activity?

WestCAT maintains an up-to-date listing of registered paratransit customers, with changes posted to the database when a new client registers or we receive information that a previously registered client no longer wishes to use our services (due to a move or change in circumstances). Registered clients remain enrolled in the system, so they do not need to be reregistered should they wish to travel. Major data cleanup is done only when major software upgrades are performed.

Roughly 3,300 clients are currently registered in the system, about 1,100 of which reside in the unincorporated portions of our service area.

a) How many of those in your client database are active riders (i.e., took at least one ride in the last six months)?

Using Trapeze, the Client Statistics Report shows 340 clients took at least one ride in the last six months.

11) Please discuss any known unmet paratransit needs in your service area. For example, residents asking to be picked-up or dropped off outside your service area to medical facilities in another city, specific locations that are frequently requested that are not within your service area, requests for additional hours or days of service, etc.

WestCAT is unaware of any significant unmet needs in the service area but is engaged in both the pilot One Seat Ride project with the other East Bay bus operators and Accessible Transportation working groups, which provide a detailed perspective of any gaps in the paratransit network within the county and beyond. The One Seat Ride pilot generates more detailed information about passenger demand for cross-boundary travel. Although not in our service area, the Richmond, San Pablo, and El Cerrito areas do lack effective paratransit connections to destinations in Central and East Counties, such as those provided by the One Seat Pilot to travelers in the WestCAT service area. Most passenger comments we receive are about transferring to East Bay Paratransit to make trips South of our service area

- 12) Service Area: Please provide a map of the service area and tables to illustrate the data, as appropriate. Describe both who is geographically eligible to ride your service and where your service will take and pick up those eligible riders.

Map attached. Trips to all eligible riders are available throughout our service area with limited direct trips outside of our boundaries for passengers with disabilities. Service within the service area is available to anyone 65 years or older, regardless of ADA eligibility.

- 13) Please share how you promote and market the programs you offer to potential new clients. Describe your outreach efforts in terms of Limited English Proficiency and Title VI. Attach your public-facing promotional materials, including your website address. Are your outreach materials available in languages other than English? If so, what languages?

WestCAT continues to promote and market the programs we offer by using our website (www.westcat.org), social media, text alerts, and community outreach events like National Night Out and Health Fairs put on at the local Senior Centers. Staff frequents senior residential communities in our service area. Postcards are mailed to current clients regarding new programs and left at Senior Centers, hospitals, and Dialysis Centers.

Currently, we have publications in English and Spanish.

- 14) Please provide any additional information that you feel is unique or relevant to the transportation service that you provide to seniors or people with disabilities.

WestCAT is seeing positive ridership growth trends in its paratransit system as people resume some pre-pandemic travel. It remains to be seen whether the pandemic will have a long-term negative effect on paratransit demand or whether things will return to 2019 levels. Of course, how this plays out will have implications for the financial viability of the paratransit system and its structure going forward.

Scheduled replacement of paratransit vehicles nearing the end of their useful life has been delayed by the unavailability of cutaway chassis, but WCCTA anticipates that all vehicles in the fleet will be replaced using Federal and TDA funds soon by mid 2024. Vehicles have begun pre-production,

- 15) West County Operators Only Program 20b: Please describe how your agency

will use program 20b funds (the amount your agency will receive is provided in the budget form). Note: It is the intent of the Measure J Transportation Expenditure Plan that Program 20b funds be used to provide “additional or new services” beyond what was previously provided under Measure C or “regular” service. If you previously started a new or additional service with these funds you can continue to use these funds to operate that service as long as it is productive.

WestCAT will continue to use Program 20b funding to support services beyond those required by the ADA, in conjunction with necessary cross-subsidization from the Transportation Development Act fund. These services include direct trips outside the WCCTA service area to dialysis centers, senior day programs, and other medical services in West County. In addition, the funding will help to offset the costs of WestCAT’s participation in the one-seat pilot as demand for this program grows.



NEW!

Low Income Fare Equity (LIFE)

Fare subsidy program

Subsidize Your Dial-A-Ride

Do you qualify as a low-income resident of Contra Costa County?*

Riders using WestCAT Dial-A-Ride may be eligible for FREE Rides!

For more information:
Call 510-724-3331 ext 113
Or email: Life@westcat.org

Program Begins February 2024

Call to Register Today!



The LIFE Program is paid for by Contra Costa County Measure X Funding



CONTRA COSTA transportation authority

* Low Income = less than 30% of area median income; call [510-724-3331 ext 113](tel:510-724-3331) to see if you qualify

Western Contra Costa Transit Authority
601 Walter Avenue.
Pinole, CA 94564



US POSTAGE PAID
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Everyone likes a
FREE RIDE

NUEVO!



Equidad en las tarifas para personas de bajos ingresos (LIFE)

Programa de tarifas con subsidio

Subvencione su Dial-A-Ride

¿Califica como residente de bajos ingresos del condado de Contra Costa?*

¡Los usuarios de Dial-A-Ride de la WestCAT pueden ser elegibles para viajar GRATIS!

Para más información:

Llame al 510-724-3331, ext. 113

O bien, envíe un correo electrónico a Life@westcat.org

El programa empieza en febrero 2024

¡Llame para inscribirse hoy mismo!

El Programa LIFE es financiado a través del impuesto Measure X del condado de Contra Costa



CONTRA COSTA transportation authority

* Bajos ingresos = menos del 30% de ingreso medio del área; llame al 510-724-3331, ext. 113, para saber si califica

Western Contra Costa Transit Authority
601 Walter Avenue.
Pinole, CA 94564



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**A Todos Nos Gustan
LOS VIAJE GRATIS**

Client Statistics Report

From Service Date: 01-13-2024 To 06-13-2024

06/13/2024

Client Name	Client ID	Address	Phone Number	Rides	Cancels	No Show	Late Cancels	Other Cancels	Other No Show	Last Ride
WILLIAMS, GWENDOLYN	12461	2100 PINE AVE		2	0	1	0	0	0	03-04-2024
WILLIAMS-WACKER, JOHN	121664	2326 MONTE VISTA DR	5109283810	0	2	0	0	0	0	N/A
WINMILL, HELLEN	120654	4516 VALLEY VIEW RD	(510)223-6742	2	1	0	0	0	0	10-19-2023
WINSTON, BERNEITE	121591	800 JOHN ST APT. A 105	510-837-1617	6	0	0	0	0	0	02-07-2024
WONG**, RUBY	121600	1130 ARLINGTON BLVD	510-233-0111	2	0	0	0	0	0	02-12-2024
WRIGHT***, IRENE	118463	305 VALLEJO ST	510-829-5644	14	2	0	0	0	0	03-27-2024
WU**, HONG	121632	13180 CLAIREPOINTE	347-244-1923	2	0	0	0	0	0	03-26-2024
WU, QIGUANG	120997	376 GARRETSON AVE	415-254-0898	1	0	0	0	0	0	04-03-2024
YANG, DING***	121506	136 HALSEY CT	6502732670	88	33	3	7	0	0	04-06-2024
YOUNG***, DEBORAH	121118	1400 FITZGERALD DR	925-339-2504	17	3	4	1	0	0	03-21-2024
ZHU***, SHULIAN	121096	1209 DEVONWOOD	510-309-2818	2	0	0	0	0	0	10-31-2022
Total Number of Rides				8,495						
Total Number of Cancels				2,317						
Total Number of No-Shows:				341						
Total Number of Late Cancels				382						
Total Number of Clients				340						
Total Number of Other Cancels				0						
Total Number of Other No-Shows:				0						

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1 CLAIMANT INFORMATION

Date 6/1/2024

Agency	WestCAT
Contact Person	Rob Thompson
Address	601 Walter Ave
	Pinole, CA 94564
Telephone No.	510-724-3331
Email	rob@westcat.org

FOR INTERNAL USE ONLY

Received:

Revised Submission:

Modifications Requested:

Subcommittee Reviewed:

3. PROJECT WORKSHEETS

A1 Measure J Claim Summary:	ALL CLAIMANTS
B. Capital Needs Forecast:	CLAIMANTS WHO USE MEASURE J FOR CAPITAL PURCHASES
C. Performance Indicators:	ALL CLAIMANTS
D. Rolling Stock Inventory:	ALL CLAIMANTS THAT OPERATE SERVICE USING MEASURE J FUNDS

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2024-25

Table A - Measure J Claim Summary TRANSIT

	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate
Program Sources (Revenues)			
	100% allocation		100% allocation
Measure J Prog 15	\$ 366,073	\$ 397,868	\$ 416,786
Measure J Prog 20	\$ 106,633	\$ 113,574	\$ 118,394
Measure J local reserves			
Measure J Interest			
Fares from Paratransit Service	\$ 23,285	\$ 25,000	\$ 25,000
TDA	\$ 699,212	\$ 592,425	\$ 1,031,458
STA	\$ 74,286	\$ 101,097	\$ 104,130
FTA	\$ 297,094	\$ 777,305	\$ 371,719
Other -	\$ 2,545		
Other -			
Total Other	\$ 2,545	\$ -	\$ -
TOTAL PROGRAM SOURCES	\$ 1,569,128	\$ 2,007,269	\$ 2,067,487
Program Uses (Expenditures)			
Administration	\$ 165,763	\$ 215,858	\$ 222,334
Paratransit Operations	\$ 1,167,285	\$ 1,511,499	\$ 1,556,844
Other -	\$ 236,080	\$ 279,912	\$ 288,309
Other -			
TOTAL PROGRAM USES	\$ 1,569,128	\$ 2,007,269	\$ 2,067,487
Capital Expenditures			
NET OPERATING BALANCE	\$ -	\$ -	\$ -
Measure J Funds: Changes in Reserve Balance			
Beginning Reserve Balance		\$ -	\$ -
Annual Revenue	\$ 1,569,128	\$ 2,007,269	\$ 2,067,487
Annual Operating Expenditures	\$ 1,569,128	\$ 2,007,269	\$ 2,067,487
Annual Capital Expenditures	\$ -	\$ -	\$ -
Ending Reserve Balance	\$ -	\$ -	\$ -

Measure J Countywide Transportation for Seniors and People
with Disabilities Program (Program 15) FY 2024-25

Table B - Capital Needs and Acquisition Forecast

Anticipated Purchases	FY 2022 Actual	FY 2023 Projected	FY 2024 Estimate	FY 2025 Estimated
1 10 Replacement cutaway buses			\$ 1,560,000	
2				
3				
4				
5				
TOTAL	\$ -	\$ -	\$ 1,560,000	\$ -

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2024-25

Table C - Performance Indicators TRANSIT

Activity	FY 2023 Actual	FY 2024 Projected	FY 2025 Estimate
PARATRANSIT or DIAL-A-RIDE OPERATION			
Total Registered Clients	3350	3500	3650
Total Passenger Trips	17523	18000	20000
Total Revenue Service Hours (RSHr)	9565	9950	9950
Pass Trips per RSHr	1.831991636	1.809045226	2.010050251
Average Passenger Trip Distance	4.5	4.5	4.8
Number of Wheelchair Passengers	1910	2000	2100
Number of No-Shows	578	450	400
Number of Cancellations	6734	5000	4500
Number of Trip Denials	0	0	0
Number of Multi-Agency Trips	605	630	650
Number of Accidents	3	2	2
Percent of On-Time Performance	92.4	95	95

see directions (and glossary) for the definitions of the above terms and the appropriate formulas

Measure J Countywide Transportation for Seniors and People with Disabilities Program (Program 15) FY 2023-24

Table D - Rolling Stock Inventory

Vehicle Model Year	Vehicle Description	Vehicle Identification	Fuel Type	Total Vehicle Mileage	Mobility Device Assist Type	Maximum Ambulatory Seating Capacity	Maximum Wheelchair Positions	Funding Source(s)	Anticipated Replacement Year
2016	Ford E-350	30	Gasoline	158291	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	31	Gasoline	156290	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	32	Gasoline	153910	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	33	Gasoline	149603	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	34	Gasoline	106169	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	35	Gasoline	140087	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	36	Gasoline	108664	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	37	Gasoline	149207	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	38	Gasoline	148803	Braun	12	4	FTA, PTMISEA, TDA	2024
2016	Ford E-350	39	Gasoline	120574	Braun	12	4	FTA, PTMISEA, TDA	2024



AGENDA REPORT

Library and Community Services

DATE:	September 24, 2024
TO:	Mayor Martinez and Members of the City Council
FROM:	LaShonda White, Deputy City Manager, Community Services Nickie Mastay, Deputy City Manager, Internal Services Lori Reese-Brown, Project Manager Hope Lattell, Finance Manager
Subject:	Receive Performance Improvement Plan for the Measure J funded R-Transit Program and Lower the Cost Pool Rate for R-Transit
FINANCIAL IMPACT:	Lowering the cost pool rate for the Measure J funded R-Transit Program will reduce the Program's administrative cost by the amount of the reduction, and increase the cost to the City's General Fund. Limiting Richmond's overhead rate to 20% would reduce the cost of general administration from \$490,000 to \$139,000. The difference of \$351,000 would increase the net cost to the City's General Fund by the same amount.
PREVIOUS COUNCIL ACTION:	N/A
STATEMENT OF THE ISSUE:	The administrator of the Measure J funds for paratransit services, the Contra Costa Transportation Authority (CCTA) finds that Richmond's overhead rate is exorbitant when compared to other recipients of the paratransit fund and are withholding their approval of the City's FY 2024-25 claim of \$1.23 Million until the City addresses this issue, as well as other concerns identified in the Authority's audit of the R-Transit program.
RECOMMENDED ACTION:	RECEIVE a presentation regarding the Richmond Paratransit Audit commissioned by the Contra Costa

	Transportation Authority; APPROVE the City of Richmond’s responses to the Audit and the Performance Improvement Plan; and AUTHORIZE the reduction of the cost pool amount allocated to the Richmond Paratransit Program by \$351,000 in Fiscal Year 2024-25 which would increase the General Fund’s obligation by \$351,000 – Community Services Department (LaShonda White 510-620-6828).
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DISCUSSION:

Richmond’s Transit Services

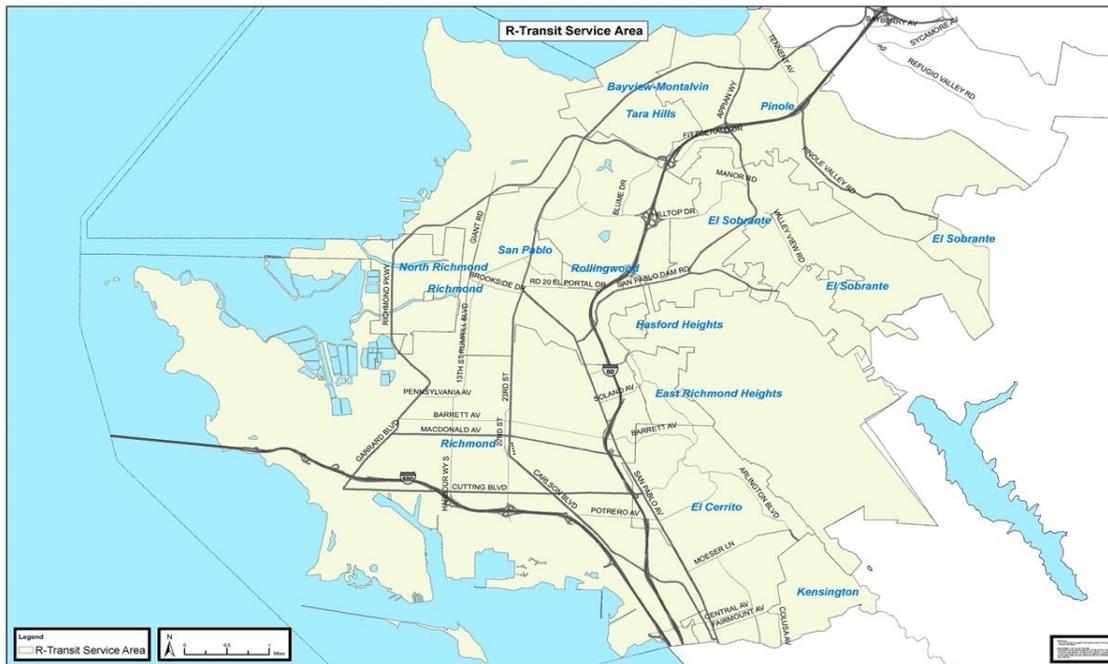
For nearly ½ century the City of Richmond has provided paratransit services for seniors and mobility impaired adults. The service has evolved into three programs that serve the residents of Richmond and surrounding unincorporated areas. For the users who require assistance there is the R-Transit program - a door-to-door demand responsive service using the City’s specialty equipped vehicles operated by trained City staff. A second program, launched in 2018, serves all seniors via an app that provides on demand curb-to-curb trips. Operations is provided through a contract with Lyft with the cost of each trip subsidized by the City. A third program is a door-to-door demand responsive service provided by a City contractor, TransMetro. It was created to be the back-up to the City’s paratransit service and thereby ensure that R-Transit clients are always served. Funding is provided from the Environmental and Community Investment Agreement (ECIA) with Chevron.

The City provides a fourth transit program called Richmond Moves. It was launched in 2022 and provides on demand shuttle service for all City residents from and to predetermined origins and destinations. Since it is available to all residents it is referred to as a micro-mobility service versus a paratransit service. Operations is provided by Nomad Transit, a wholly owned subsidiary of Via Transportation (Via). Funding is provided from the Transit and Intercity Rail Capital Program (TIRCP), along with a 50 percent match from the ECIA.

A summary of the City’s transit services is shown in the below chart.

Program	Service	Provider	Eligibility	Funding Source
R-Transit	Door-to-door	City staff	55+ 18-54 disabled	Measure J
R-Transit with Lyft	Curb-to-curb Lyft vehicle	Lyft	55+ 18-54 disabled	Measure J
R-Transit with TransMetro	Door-to-door	TransMetro	55+ 18-54 disabled	ECIA
Richmond Moves	Corner-to-corner	Nomad Transit (aka Via)	All Residents	TIRCP and ECIA

The service area for the R-Transit services is shown below:



Measure J Fund

In 2004 the Contra Costa voters approved Measure J, which extended the half-cent local transportation sales tax, first established by Measure C, for another 25 years. The Contra Costa Transportation Authority administers Measure J funds. Program 15 of Measure J is dedicated to transportation for seniors and people with disabilities, commonly referred to as paratransit. Individuals with disabilities, as defined by the Americans with Disabilities Act (or ADA), must be served; and services not required by law, but reflect local community interests, such as non-ADA seniors, may be served. The total amount of Program 15 funds and the set aside for each of the 7 eligible providers are calculated annually by the CCTA. The eligible providers are shown below.

1. Central Contra Costa Transit Authority (aka County Connection)
2. East Bay Paratransit Consortium
3. Eastern Contra Costa Transit Authority (aka Tri Delta Transit)
4. West Contra Costa Transit Authority (aka WestCAT)
5. City of El Cerrito
6. City of San Pablo
7. City of Richmond

Program 20 of Measure J is dedicated for additional transportation services for seniors and people with disabilities. For the West Contra Costa Subregion, of which Richmond is a part of, these funds may be used, but not limited, for vehicle replacements, the subsidy of sedan/taxi services, new services, an increase in demand, an increase in

costs, and a decline in revenues. The total amount of Program 20 funds and the set aside for each of the eligible providers are calculated annually by the CCTA.

As earlier mentioned, two of three paratransit services provided by the City of Richmond are funded through Measure J. To receive the annual funds the provider must submit a CCTA claim form. The claim includes information about the program's previous, current, and next year's performance and finances. The review and approval of the claim has four steps involving the CCTA staff; a subcommittee of the Paratransit Coordinating Council (PCC); the PCC; and the CCTA Board.

In FY 2019-20 Richmond's claim was approved and Measure J funding was dispersed for FY 2018-19 and FY 2019-20. In FY 2020-21 and again in FY 2021-22 the claim process was suspended due to COVID, but Richmond, like the other providers, received Measure J funds. In FY 2022-23 the City prepared a claim but according to the CCTA was not received. The issue of the missing claim was not resolved and that resulted in the loss of Measure J funding for that year. In FY 2023-24 the City filed a claim but it was deemed to be incomplete. For a 2nd year the issue was not resolved that resulted in the loss of Measure J funding. In February 2024, the CCTA Board authorized an audit of the Richmond paratransit program for the five-year period from FY 2018-19 through FY 2023-24. The audit was completed in June 2024.

What Happened Between 2022 and 2024

The workload of the staff in the Transportation Division in Community Services exceeded staff's capacity. The manager of the Division spends less than 50 percent of their time overseeing paratransit services with the remainder of their time allocated to micromobility services (i.e. Richmond Moves, bikeshare, and car share programs), expanding EV charging systems, parking, transportation demand management, and regional transportation coordination. While more attention to the gathering and analysis of accurate performance and financial data could have occurred, the attention of staff was on the operations of the paratransit services, the expansion of the Lyft program and the development of the Richmond Move program. It is noted that the Lyft program, advocated by the Division manager, grew its ridership to be 10 times larger than the original paratransit service.

When the City was notified of the CCTA audit, City staff from Community Services and Finance, including both Deputy City Managers worked collaboratively to prepare for and respond to the audit findings. In addition, the Deputy City Manager of Community Services retained the services of a consultant with MRG to assist in effectively responding to the audit findings.

The transfer of the Transportation Division from the Community Services Department to the Public Works Department was envisioned to occur in 2022, at the time the current Community Services Department was being constituted. That transfer, however, was delayed due to a change in leadership in Public Works and the need for the new Director to focus on his existing cadre of services.

What is Happening Now

The formal transfer of the Transportation Division from Community Services to Public Works is scheduled to occur in FY 2024-25. In anticipation of the official transfer, vacant positions in Community Services - Transportation have been repurposed in Public Works, which has enabled Public Works to begin to build a comprehensive transportation division. The division will be engaged not only in transit services, but it will also be the lead in traffic calming, safety improvements, micromobility services, EV charging systems, parking, transportation demand management, and regional transportation coordination.

The Transportation Division will be led by a new Transportation Manager, funded by the salary savings from the deletion of the existing division manager position of Project Manager II, who is before the end of the calendar year 2024. The new position is subject to the approval by Richmond's Personnel Board and the salary range approved by the City Council. The Public Works Department is planning to establish the position before transferring the Transportation Division to Public Works.

In addition, through collaboration with Human Resources, the position of Paratransit Coordinator or similar classification will be created subject to the constraints of the Measure J funded annual budget. The new position is also subject to the approval by Richmond's Personnel Board and the salary range approved by the City Council. The Community Services Department is planning to establish the position before transferring the Transportation Division to Public Works.

Performance Improvement Plan

The Measure J Audit produced 29 recommendations. All recommendations are addressed in the Performance Improvement Plan (Plan), which was collaboratively and thoughtfully developed with the consultant and City staff. The following chart shows the Plan's desired outcomes, its relationship to audit recommendations, and the schedule to develop and utilize the outcomes. Additional information regarding the 13 outcomes are described in the August 19, 2024 transmittal to the CCTA attached to this report. City staff is recommending that City Council approve City staff's responses to the CCTA Audit findings and the proposed plans for implementing the audit findings. The consultant from MRG will support City staff in operationalizing the audit findings. The City's responses to the Plan, along with the CCTA Audit and other relevant documents, are included in Attachment 1.

Desired Outcome & Audit Recommendation #		2024						2025					
		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
1	Accurate performance and financial data 1, 4, 5, 12, 13, 19, 20, 23												
2	Continuous monitoring, evaluation, & incremental improvements 3, 4												
3	Functional paratransit vehicles 16												
4	Capable paratransit drivers 17,21,22												
5	Lower administrative cost (cost pool allocation) 7, 8, 9												
6	Measure J funding for FY 2024-25 Approved 1,2,5,6,9												
7	Resolution of Measure J funding in previous fiscal years 5, 6												
8	Transfer paratransit program to Public Works 5												
9	Increase # of clients and # trips 15, 24, 25, 26, 27, 28												
10	Increase customer satisfaction 29												
11	Reduce cost/trip – ambulatory and non-ambulatory 10, 11												
12	Assessment of service delivery options for FY 2025-26												
13	Measure J funding for FY 2025-26 Approved 2												

Cost Pool (Overhead)

The Audit highlighted that a significant portion of Richmond’s Measure J Paratransit Program is budgeted for administrative costs (aka overhead). The FY 2024-25 Measure J Claim includes \$489,624 for administrative costs and \$695,352 for operating costs, excluding the Lyft subsidy. That means that for every \$7 spent to operate the paratransit service, another \$5 is spent on overhead. This equates to an overhead rate of approximately 70%. In comparison the overhead rates for the Measure J providers that comprise the West Contra Costa County Subregion is shown below.

Program Expenditures	West Contra Costa County Subregion Providers			
	City of Richmond	City of San Pablo	City of El Cerrito	West Contra Costa Transit Authority
General Administration	\$489,624	\$61,800	\$33,295	\$222,334
Paratransit & Excursion Operations	\$695,352	\$273,500	\$138,671	\$1,845,153
Overhead Rates (Admin/Operations)	70.4%	22.6%	24.0%	12.0%

Source: FY 2024-25 Measure J Claim Forms

The reduction in the cost of overhead would increase the amount of Measure J funds available for operations that could be used to expand services and/or address unmet needs. For this reason, the CCTA strongly recommends that Richmond lower its overhead cost.

The administrative cost of the Richmond R-Transit program consists entirely of the City’s cost pool. The cost pool is a proportionate share of expenses by the City’s internal services and the general liability expense that supports the delivery of direct city services. Examples of internal services include legal, financial and human resources.

Council Options

The Administration has identified three options for the consideration of the City Council. The options and the consequences are shown below:

1. Limit Richmond’s overhead rate to 20 percent (Staff’s Current Recommendation) - This proposed amount is comparable to other Measure J claimants. For FY 2024-25 Richmond’s ratio of administrative costs to operating costs is 70.4%. The average ratio of the other claimants in the West Contra Costa County Subregion is approximately 20%. Limiting Richmond’s overhead rate to 20% would reduce the cost of general administration from \$490,000 to \$139,000. The difference of \$351,000 would increase the net cost to the City’s General Fund by the same amount. On the other hand, the reduction in overhead costs would increase the likelihood that the Measure J claim for FY 2024-25 would be approved, thereby avoiding the possible loss of \$1.23 million in the General Fund if the claim was denied. The “savings” to the paratransit program of \$351,000 could be budgeted to increase services and/or address unmet needs.
2. No change – The Measure J funded paratransit program would not deviate from the City’s existing allocation of the Cost Pool. The current citywide allocation already reflects a reduction in the full recovery of overhead charges. Lowering the cost pool allocation further for the paratransit program will negatively impact the City General

Fund by the amount of the reduction. For example, lowering the recovery of administrative costs by \$350,000 would increase the net cost to the City's General Fund by the same amount. However, if the City's decision to not lower its administrative charges resulted in the loss of Measure J funds, the impact on the General Fund would be the loss, in FY 2024-25, of \$1.23 million.

3. Full exemption from Cost Pool allocation – The exemption of the Measure J funded paratransit program from the Cost Pool would increase the net cost to the City's General Fund by \$490,000. The "savings" to the paratransit program of \$490,000 could be budgeted to increase services and/or address unmet needs. Richmond, however, would stand alone out of the 7 claimants for Measure J paratransit funds, to forgo any funding for the organization's administrative costs.

Option 1, limiting Richmond's overhead rate to 20 percent, is recommended because it is responsive to the recommendations of the Audit, it is in-line with the overhead rates of the other providers in the West Contra Costa County Subregion, and it results in additional funds being available to expand paratransit services and/or address unmet needs.

NEXT STEPS

City staff continues to meet collaboratively with CCTA staff to discuss the implementation of the R-Transit audit to ensure successful service delivery for patrons. A focus on work will include but is not limited to the development of a paratransit rider's guide, standard operating procedures, improved outreach, increase in ridership, and implementation of customer satisfaction surveys. The City will continue to work with Human Resources on staffing needs. In addition, the City is working with CCTA staff to resolve and receive outstanding Measure J funding revenue from FY 2021-22 to FY 2024-25 to substantially reduce or remove the current negative fund balance.

The City presented an update to the CCTA Paratransit Coordinating Committee on September 16, 2024, and there are plans for a presentation and update to the CCTA Board in October or November 2024. The CCTA Board will be charged with deciding regarding if Richmond's Performance Improvement Plan is sufficient to allow Richmond to keep its Paratransit program or if a decision will be made to transfer Richmond's program to another jurisdiction. If the City is unable to retain the paratransit program, City staff will return to City Council as soon as feasible to discuss next steps. City staff is optimistic that Richmond's Performance Improvement Plan demonstrates Richmond's dedication to continuous improvement and serving the residents that use paratransit services.

DOCUMENTS ATTACHED:

Attachment 1 – Transmittal to CCTA Regarding the FY 2024-25 Draft Paratransit Performance Improvement Plan including CCTA Audit

Attachment 2 – Draft Paratransit Performance Improvement Plan Slide Deck



August 19, 2024

Newell Arnerich, Chair
Contra Costa Transportation Authority
2999 Oak Road, Suite 100
Walnut Creek, CA 94597

Subject: City of Richmond Paratransit Service Measure J Audit Program 15 –
Commitment and Performance Improvement Plan

Dear Newell Arnerich:

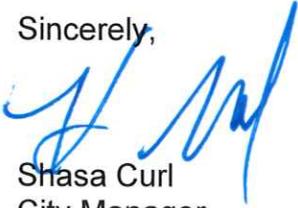
This letter is in response to the Contra Costa Transportation Authority's (CCTA) letter dated June 20, 2024, pertaining to the City of Richmond's Paratransit Service Measure J Audit Program 15. Per the letter, on July 20, 2024, the City submitted a Letter of Intent to CCTA stating the City's interest and intent to continue operating its paratransit program and indicating that a subsequent letter would be submitted by August 19, 2024, containing the City's plans to improve performance of the paratransit plan.

This letter is to confirm that the City intends to deliver its existing paratransit services during Fiscal Year 2024-25. To move the program forward and to address the findings and recommendations in the 2024 CCTA Audit, we developed a Performance Improvement Plan ("Plan") that includes the desired outcomes and a schedule. The Draft Plan is attached. In September 2024, the Richmond City Council will consider the Plan and address policy issues such as proposed staffing changes and the Cost Pool allocation for the Measure J funded paratransit program. The final Plan will reflect the direction of the City Council. Richmond's pending claim for FY 2024-25 Measure J funding will be updated to reflect the final Plan in hopes that it will be considered by the Paratransit Coordinating Council in October 2024.

We would like to acknowledge and express our appreciation for the professionalism and support of CCTA staff, its consultants, and the Paratransit Coordinating Council throughout the course of this audit process. The City of Richmond looks forward to continuing to work collaboratively with CCTA to make needed improvements.

If you have any questions or concerns, please feel free to reach out to me at shasa_curl@ci.richmond.ca.us and/or LaShonda White, Deputy City Manager – Community Services, at lashonda_white@ci.richmonda.ca.us or 510-620-6828.

Sincerely,



Shasa Curl
City Manager
City of Richmond

Electronic Copy: Mayor Eduardo Martinez and Members of the Richmond City Council
LaShonda White, Deputy City Manager – Community Services
Nickie Mastay, Deputy City Manager – Internal Services
Timothy Haile, Executive Director, CCTA
Rashida Kamara, Accessibility Equity Programs Manager, CCTA

**Draft FY 2024-25 Performance Improvement Plan
City of Richmond Paratransit Services**

Background

The 2024 Measure J Audit (“Audit”) of the City of Richmond Paratransit Program recommended that the Contra Costa Transportation Authority (CCTA) develop a Performance Improvement Plan (Plan) for the City of Richmond’s paratransit program. The CCTA staff indicated that the City and not CCTA should develop that Plan and that the Plan should reflect the Audit’s findings and recommendations. In adherence to CCTA’s requests, the City is submitting a Plan which includes the chart below summarizing the Plan’s desired outcomes, relationship to CCTA audit recommendations, and the schedule to develop and operationalize the outcomes. Additional details for each of the 13 outcomes are described following the chart. The CCTA letter, CCTA Paratransit Audit, and the City’s initial response are attached for reference.

Desired Outcome & Audit Recommendation #		2024						2025					
		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June
1	Accurate performance and financial data												
	1, 4, 5, 12, 13, 19, 20, 23												
2	Continuous monitoring, evaluation, & incremental improvements												
	3, 4												
3	Functional paratransit vehicles												
	16												
4	Paratransit staffing												
	17,21,22												
5	Lower administrative cost (cost pool allocation)												
	7, 8, 9												
6	Measure J funding for FY 2024-25 Approved												
	1,2,5,6,9												
7	Resolution of Measure J funding for previous fiscal years												
	5, 6												
8	Transfer paratransit program to Public Works												
	5												
9	Increase # of clients and # trips												
	15, 24, 25, 26, 27, 28												
10	Increase customer satisfaction												
	29												
11	Reduce cost/trip – ambulatory and non-ambulatory												
	10, 11												
12	Assessment of service delivery options for FY 2025-26												
13	Measure J funding for FY 2025-26 Approved												
	2												

Two of the 29 Audit recommendations are not referenced in the Plan for the reasons described below:

- Recommendation #14 is for the CCTA – To revise the Measure J Claims forms to clarify terms. Recommendation #14 has been completed.
- Recommendation #18 states that the Richmond Rider ID Card serves no useful purpose and should be sunset. Recommendation #18 has been completed.

It is important to note that the City provides a micro-mobility service, called Richmond Moves, that does not receive any Measure J funding, and is therefore not included in the Plan. Richmond Moves is operated by a company called Nomad, LLC (dba as Via). Via also owns Richmond paratransit's new routing and data management system.

The draft proposed Plan and timeline may be revised based on additional information received regarding the paratransit program, direction from Richmond City Council, and/or discussions with CCTA staff/Board.

Desired Outcome 1: Accurate Performance and Financial Data

➤ Corresponding CCTA Audit Recommendations: 1, 4, 5, 12, 13, 19, 20, 23

CCTA Audit Language: *The Audit found errors, inconsistencies, and contradictions in the FY 23/24 Claim Forms. The Audit concluded that City staff do not understand the relevancy of performance metrics; have different understandings of terms such as trip and fare revenues; different ways of accounting for fees; and use different calculations for on-time performance. These differences contribute to lapses in detecting obvious errors in data. The Audit noted that the City does not maintain a record of all customer calls. It recommended that a log be instituted that includes a checkbox for each of the categories of Unmet Needs identified in the Claims Forms. It is recommended that additional training and support be provided for the new Via software; that qualified staff ensure the accuracy of data; that the Via program is set-up to optimize its utility; and that all program staff understand the utility of performance metrics and levels of service. In the alternative, replace City staff by outsourcing the service. It is further recommended that an ongoing internal audit of various reports be done and that a quality assessment of supporting reports and documentation used for Measure J Claims be completed prior to the submittal of a Claim.*

City's Corrective Actions:

A Standard Operating Procedure (SOP) for Richmond's paratransit services will be created by the Community Services Department. The SOP will include but is not limited to information regarding paratransit industry service standards, staff training for dispatchers and drivers, customer service standards, as well as the collection, entering, use and analysis of performance and financial data for the Measure J funded services. It will include all forms of input (i.e. electronic and phone calls). In addition, the definition of all terms will be included in the SOP. The City currently has a consultant onboard that is prepared to assist with SOP development and other paratransit-related tasks, if necessary.

The City is working with Via to update the routing and data management system as needed to ensure the appropriate data is collected. Paratransit and City staff currently meet bi-weekly with Via staff which allows for training, information sharing, and review of ridership data. Staff will continue to receive training on the use and capabilities of the Via system. To optimize the benefits of the data systems, the existing bi-weekly meetings with Via will be memorialized with the preparation and review of monthly reports. Each report will be reviewed by the paratransit team for completeness and accuracy.

The City currently utilizes two additional services to support the traditional paratransit van service – Lyft and TransMetro. Lyft is a ride share service that is under contract with the City of Richmond to provide an option for ambulatory paratransit customers. The City has seen major annual increases in Lyft ridership reaching over 17,000 rides provided in Fiscal Year (FY) 2023-24. City staff also receives monthly raw data for all Lyft rides which is disaggregated for increased analysis and reporting. More information regarding Lyft services can be found at: <https://www.ci.richmond.ca.us/3747/R-Transit-with-Lyft>.

In addition, the City has a contract with TransMetro to provide back-up van service when City's 2 paratransit drivers are unable to meet service needs. The City sends daily manifests to TransMetro for rides, as needed, and inputs data from TransMetro rides into the existing Via data system. The City is working with TransMetro and Via to ensure all relevant data is collected for Measure J reporting.

The information collected may include but not necessarily be limited to the following:

- # distinct clients served by City Paratransit, TransMetro, and Lyft services by clients' residency (e.g. City of Richmond, unincorporated area)
- # boardings on City Paratransit, TransMetro, and Lyft services by passenger's residency (e.g. City of Richmond, unincorporated area). The attendants and guests of a disabled client are counted as separate boardings. (e.g. a disabled client, her attendant and son count as 3 boardings)
- # wheelchair passenger boardings on City Paratransit, TransMetro, and Lyft
- # boardings with attendants by City Paratransit and TransMetro
- # revenue service hours for City Paratransit
- # revenue service miles for City Paratransit
- # no-shows by City Paratransit, TransMetro, and Lyft
- # cancellations by City Paratransit, TransMetro, and Lyft
- # trips denied by City Paratransit, TransMetro, and Lyft
- # multi-agency trips by City Paratransit
- # accidents by City Paratransit, TransMetro, and Lyft
- % of on-time performance by City Paratransit, TransMetro, and Lyft
- # Lyft boardings provided outside of paratransit hours of operations
- # Lyft boardings to destinations not provided by City Paratransit services
- \$ fares collected by City Paratransit and TransMetro services

- \$ invoices received from TransMetro and Lyft services
- \$ payments to TransMetro and Lyft services
- \$ Measure J invoices sent
- \$ Measure J payments received

Desired Outcome 2: Continuous Monitoring, Evaluation, and Incremental Improvements

➤ Corresponding CCTA Audit Response: 4

CCTA Audit Language: *The Audit did not include specific recommendations regarding the City's paratransit level of service, because there is no agreement between the CCTA and the Measure J fund recipients to institute such a performance measurement system.*

City's Corrective Actions:

The paratransit team members will meet at least monthly to review and analyze the performance and financial data from outcome #1 and, as the information becomes available, from outcomes #9, #10, and #11. The actual results will be used to develop quarterly projections and be used to update the annual objectives for the performance indicators. The team will address all anomalies in data and unmet needs. It will search for opportunities and process improvements to increase the effectiveness and efficiency of operations. Key performance indicators used to measure the success of the paratransit services will include number of unique riders, number of registered clients, the cost/subsidy per passenger trip, on-time performance, and customer satisfaction. The verified information will be used in the pending FY 2024-25 Claim for Measure J funding, as described in #5, below. Community Services will lead this effort, with the assistance of an existing consultant, and provide the system to Public Works when the program is transferred as described in #8, below.

Desired Outcome 3: Functional Vehicles

➤ Corresponding CCTA Audit Recommendation: 16

CCTA Audit Language: *The Audit concluded that the existing paratransit vans are in poor condition and that two replacement electric vans are not in use due to lack of adequate charging facilities. It recommended that the City prioritize the deployment of the new paratransit vans. However, during an inspection of the new vans, CCTA staff identified concerns such as the side doorsteps are too high, and handrails are missing.*

City's Corrective Action:

The Community Services staff is working with the Public Works Department to ensure that the new vehicles are placed in service as soon as possible and that the existing vehicles, while they are being utilized, are given priority attention.

CCTA conducted an inspection of the new vans in July 2024 and shared a few concerns regarding the specifications of the new vehicles. City staff noted those concerns and plans

to work with paratransit drivers and Public Works staff to determine if modifications can be made to the new vans to make them more functional for seniors. It is City's staff understanding that there are no industry best practices and/or CCTA specifications for paratransit vehicles. Therefore, City staff worked closely with the vehicle manufacturer to build the new vans based on client needs. Since the City did not utilize Measure J funds to purchase the new vans, the City is amenable to working with CCTA staff to build the specifications for new vans for purchase using future Measure J funds.

Desired Outcome 4: Paratransit Staffing

➤ **Corresponding CCTA Audit Recommendation: 17,21, 22**

CCTA Audit Language: *The Audit recommended the City hire a full-time paratransit coordinator to oversee its programs. In addition, they pointed out that one of the two paratransit drivers has restrictions due to a disability accommodation. Since the driver is not able to assist non-ambulatory riders, she functions as a part-time employee (about ½ FTE) with duties that include driving, dispatching and office work. The Audit reported that the drivers want clients to have personal care attendants (PCA) to assist them load and unload non-ambulatory riders. Richmond already has a relatively high PCA to non-ambulatory rider ratio of 2 to 3. According to the Audit, however, a PCA is not a substitute for the driver under any circumstances. It is recommended that the City assess the fitness of its existing drivers to perform the duties of the job. It is further recommended that a training program be implemented that includes defensive driver training with a refresher every three years; mobility device training; working with riders with physical and cognitive disabilities. Another recommendation is pre-employment and accident/incident drug testing and random drug testing.*

City's Corrective Actions:

Community Services Department will work with the Richmond Human Resource Department to develop the appropriate job description for a Paratransit Coordinator or similar position, if directed. This position will have to be approved by Richmond's Personnel Board and the salary range approved by City Council before the recruitment process can commence.

It is noted that the job classification of Paratransit Driver was modified when the position was classified to R-Transit Paratransit Driver with the addition under working conditions as "Medium Work". If major changes are required for drivers, City staff will work with Human Resources to identify feasible options to ensure that the rights of the drivers are maintained, while also meeting service needs for the community. Community Services will work with the drivers to schedule training including, but not limited to defensive driver training, the use of mobility devices, and working with riders with physical and cognitive disabilities. Additional trainings, some of which have already been implemented, include writing and editing (to assist with completing Measure J narratives), CPR and First Aid training, and customer service training. Random drug and alcohol testing will be conducted consistent with City

policies. The above issue will be resolved, and the full training program will commence prior to the paratransit program being transferred to the Public Works Department (see #8 below).

Desired Outcome 5: Lower Cost Pool Allocation

➤ **Corresponding CCTA Audit Recommendation(s): 7,8, 9**

CCTA Audit Language: *The Audit highlighted that a significant portion of Richmond’s Measure J Program 15 budget is used for administrative costs, that the amount is exorbitant, and strongly recommends that the rate be reduced.*

City’s Corrective Action:

The administrative cost shown in the City’s Measure J budget consists of the City’s Cost Pool allocation. The Cost Pool is the collection of expenses by the City’s internal services and the general liability program that are needed to support the delivery of direct city services. Examples of internal services include information technology, legal, finance and human resources. The total cost of the pool expenses is prorated among the programs that use these services. For the Measure J funded paratransit services, the ratio of the City’s Cost Pool to operating cost is high. The FY 2024-25 Measure J Claim includes \$489,624 for administrative costs and \$695,352 for operating costs, excluding the Lyft subsidy. The City’s ratio of administrative cost/operating cost of 70% is much higher than the roughly 20% rate of similar Measure J funded paratransit programs. The City’s administration is reviewing the Cost Pool allocation for paratransit and will provide options for the consideration of the City Council at a meeting in September 2024. Making changes to the Cost Pool allocation is a City Council and not a City staff decision. The City Council’s decision will be reflected in the City’s pending FY 2024-25 Measure J Claim.

Desired Outcome 6: Measure J Program 15/20 Funding for FY 2024-25 Approved

➤ **Corresponding CCTA Audit Recommendation(s): 1,2,5,6,9**

CCTA Audit Language: *The Audit pointed out that Richmond’s Measure J claim needed to address the errors, inconsistencies and contradictions of earlier claims; that the cost of administrative be reduced; that the claim is complete, and that the cost of the paratransit and Lyft services is broken out.*

City’s Corrective Actions:

Due to the flaws in gathering and recording performance data, it is not possible to provide data that was not gathered, and/or not accurately recorded. Going forward, the new Via data management system described in Desired Outcome #1 will be used to revise the estimates in the City’s pending Measure J Claim Form(s). In addition, the administrative costs will reflect the decision by the City Council regarding Cost Pool allocations as described in Desired Outcome #5.

As stated, the City receives monthly raw data from Lyft that can be analyzed and reported as part of the Measure J claims. To-date, the City has provided Lyft data for FY 21/22, FY 22/23

and FY 23/24. The Community Services Department will manage the efforts to obtain approval of the Claim.

Desired Outcome 7: Resolution of Previously Denied Measure J Program 15/20 Claims

➤ Corresponding CCTA Audit Recommendation(s): 5, 6

CCTA Audit Language: *The Audit documented that the status of the Richmond claims are as shown below:*

- *FY 19/20 Claim accepted: Allocated two fiscal years funding of \$1.7 million*
- *FY 20/21 Claim process suspended due to COVID: Allocated \$698 K*
- *FY 21/22 Claim process suspended due to COVID: Allocated \$326 K*
- *FY 22/23 No claim received (but City prepared incomplete claim) Allocated \$0*
- *FY 23/24 Claim denied: Audit triggered: Allocated \$0*

During the Audit, the City provided the program budgets for the each of the above fiscal years but did not provide sufficient back-up documentation to confirm what was spent and that direct costs cited were spent on the program. Additionally, because only two complete Claims were submitted for the five fiscal years of review, and they represent the first and last years, there is no way to track the flow of the expenditures to budget or to follow that reserve balance.

City's Corrective Action:

While it is not possible to recreate data to replace the missing performance data for FYs 21/22, 22/23 and 23/24, it is possible to provide the requested financial records such as invoices, expense reports, receipts, and expenditures. If requested, the Community Services Department will lead this effort through fruition. Since the publishing of the Audit, the City submitted the FY 22/23 Measure J claim forms with the best information available, and submitted the additional information requested by CCTA required to receive the remaining FY 21/22 Measure J payments. The City submitted the FY 23/24 claim form on-time but due to on-going concerns from CCTA, the audit commenced, and no funds were received. City staff will revise and resubmit past Measure J claim forms to incorporate any direction by Richmond City Council, as well as future recommendations by CCTA.

Desired Outcome 8: Transfer Paratransit Program to Public Works

➤ Corresponding CCTA Audit Recommendation(s): 5

CCTA Audit Language: *The Audit concluded that if the service were to remain under the auspices of the City, a new, full-time administrator should be put in charge of the program to prioritize corrections, focusing first on issues of safety and customer care. The positions should report directly to senior management. That person should have experience in the delivery of transit services for seniors and persons with disabilities.*

City's Corrective Actions:

The transfer of the Transportation Division from the Community Services Department to the Public Works Department is currently scheduled to occur in late 2024. Based on existing information, the current program manager within the Transportation Division in Community Services plans on retiring in 2024, prior to the transfer of the Division to Public Works. The current manager spends less than 50 percent of their time overseeing paratransit services with the remainder of their time spread between micromobility services, electric vehicle charging systems, parking, transportation demand management, regional transportation coordination, and other duties. The Public Works Department is aware of the CCTA Audit and this Performance Improvement Plan. When the transfer occurs (projected in December 2024), the Transportation Division's new manager will report directly to the City Engineer/Deputy Director of Public Works. The new division manager will be capable of effectively managing the paratransit program. The Transportation Division will include or have access to staff such as engineers that can coordinate other transportation needs, administrative staff to assist with contract oversight, bilingual staff that can support paratransit riders, along with the paratransit staff. Additional staff are being considered but are subject to the determination of both needs and availability of funding. If appropriate and directed for continued management of the paratransit program, City staff is prepared to develop and release a job description for a full-time Paratransit Coordinator or similar position. The transition of the paratransit program from Community Services to Public Works will be done in a thoughtful manner that will ensure paratransit staff are supported and community members continue to receive seamless services.

Desired Outcome 9: Increase Number of Clients and Number Trips

➤ **Corresponding CCTA Audit Recommendation(s): 15, 24, 25, 26, 27, 28**

CCTA Audit Language: *The Audit reported that the total ridership for both the Paratransit and Lyft programs is in the range of 2,800-3,000/year. This was based on incomplete information provided by the City. The updated ridership for FY 23/24 is 1,676 for paratransit, approximately 600 rides by TransMetro, and 17,442 for Lyft – a total of nearly 20,000/year. Even with the incomplete information the Audit concluded that the Lyft program has the greatest potential with unlimited capacity to increase ridership at the lowest cost. It recommended that the Lyft program be promoted. In terms of the City paratransit service, it is not clear if there is an unmet need, because the TransMETRO service is used to provide any trip that cannot be provided by City paratransit. The Audit recommended a number of specific actions including updating the City's paratransit website; providing a translation service to provide over the phone; and providing print material in Spanish, in large print, Braille, and audio. It recommended that the Lyft brochure and the Client Orientation Guide be updated.*

City's Corrective Actions:

A greater focus on increasing the number of clients and ridership is planned to occur after the paratransit program is transferred to Public Works and the paratransit program is under a new management team. The City is in the process of updating the City's website, as well

as the paratransit webpages. Print material was previously updated and is being widely distributed at public facilities, posted on social media platforms, and shared at community events. City staff agrees that information and services should be available in other languages, such as Spanish, and will continue to implement this recommendation. City staff is currently working on translating relevant materials to Spanish. Other actions will be considered based on the review and assessment of the monthly performance reports, and the determination of unmet needs. Any additional staff, such as a new Transportation Manager in Public Works and/or a Paratransit Coordinator, will support the ongoing outreach to recruit and retain clients and increase trips. It is important to note that Lyft trips have steadily increased since City staff have begun analyzing and reporting data in FY 21/22, with over 17,000 trips reported in FY 23/24.

Desired Outcome 10: Increase Customer Satisfaction

➤ **Corresponding CCTA Audit Recommendation: 29**

CCTA Audit Language: *The Audit acknowledged the City's Paratransit Survey on its website. But noted that the feedback included 10 responses in 9 years, with no responses in the past 5 years. It is recommended that all clients be contacted annually to solicit feedback. The information should be analyzed to determine how to improve the customer experience. All client comments should be maintained.*

City's Corrective Actions:

The City's existing Paratransit Survey will be updated and promoted, for both the City paratransit and the Lyft paratransit programs. This should be added to the monthly performance and financial reports as part of the on-going evaluation of paratransit services. A standard operating procedure will be developed and adhered to for the gathering, storage, and use of information related to customer satisfaction. The new Transportation Manager will expand the program's existing efforts of Community Services.

Desired Outcome 11: Reduce Cost Per Trip

➤ **Corresponding CCTA Audit Recommendation(s): 10, 11**

CCTA Audit Language: *The Audit pointed out that the cost per trip is high and recommended that the City work to lower cost and increase ridership. It pointed out that the benefits to salary ratio is higher for this program than the City average. While this may be true the benefits of each employee was reviewed and confirmed to be accurate.*

City's Corrective Actions:

A greater focus on reducing cost per trip is planned to occur after the paratransit services are transferred to Public Works and under a new management team. It is important to remember that the Richmond paratransit service consists of three programs. The paratransit service is expensive at a projected cost per trip for FY 2024/25 of \$658. The TransMETRO service provides paratransit service when City vehicles/drivers are not available. The City pays a fixed rate of \$750 per day per vehicle. This service can be as low as \$100/trip

depending upon the number of rides provided by the vehicle per day. The Lyft paratransit service is the most economical at a projected City cost per trip for FY 2024/25 of \$10 per trip. Collectively the cost of the three paratransit programs is less than \$70/trip. In comparison the cost per trip for the San Pablo service is \$79; for El Cerrito the cost is \$89; and for WestCAT the cost is \$103.

The new Transportation Manager and/or Paratransit Coordinator will oversee the analysis of the Richmond paratransit's cost per trip including the potential of increasing ridership, reducing operating costs, improving vehicle reliability, adjusting usage of TransMETRO or other supplemental van service providers, and outsourcing van service if this is a direction deemed feasible and necessary by CCTA and/or City Council.

Desired Outcome 12: Assessment of Service Delivery Options

➤ **Corresponding CCTA Audit Recommendation: N/A**

CCTA Audit Language: *The Audit concluded that if the City is unable to address the issues identified in the Audit, a complete shift in the delivery of paratransit services is warranted. The City should turn over the program management to another public agency, and ideally, it would be the West Contra Costa Technical Advisory Committee (WCCTAC). In response, the WCCTAC indicated that it is neither set-up nor interested in delivering paratransit services. The Audit also concluded that the City should assess the cost and potential benefits of transitioning its paratransit service delivery to a contracted vendor.*

City's Corrective Actions:

Based on the outcomes of the meetings with Richmond City Council in September 2024 and CCTA Board in October 2024, the existing and future delivery of services will be evaluated by the City of Richmond (Human Resources, Community Services and Public Works Departments) in early 2025. If changes are warranted and direction is provided by the CCTA Board and City Council, the City will assess contracting out services currently provided by City employees and/or turning over all or a portion of the City's Measure J Funded paratransit services to another public agency. Ultimately, the City Council will decide on any changes in the delivery of services. Outsourcing is a sensitive and complicated topic that the City takes seriously. Conversations with appropriate unions, City staff and departments, as well as City Council would have to occur, and various steps would be taken before a decision can be made to move in that direction.

Desired Outcome 13: Measure J Program 15/20 Funding for FY 2025-26 Approved

➤ **Corresponding CCTA Audit Recommendation(S): 2, 5, 6**

CCTA Audit Language: *The Audit noted that the City has not successfully filed a Measure J Claim for the past several years. It recommends that the City prioritize filing an annual Claim.*

City's Corrective Actions:

The filing of an annual Claim should not be an end of year effort. It is part of the on-going process to continuously improve the City's paratransit services. The new transportation management team in the Public Works Department is looking forward to submitting the Measure J Claim for FY 25/26 in compliance with all CCTA provisions.

Richmond Paratransit Additional Documents:

- CCTA Letter dated June 20, 2024
- City of Richmond's Letter of Intent dated July 20, 2024
- Richmond Paratransit Measure J Audit received May 7, 2024
- City of Richmond Responses to Richmond Paratransit Measure J Audit dated May 9, 2024



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Executive Director

June 20, 2024

Shasa Curl
City Manager
City of Richmond
450 Civic Center Plaza
Richmond, CA 94804

Subject: City of Richmond Paratransit Service Measure J Audit

Dear Shasa Curl,

At its June 12, 2024 meeting, the Contra Costa Transportation Authority (CCTA) Board unanimously approved the Draft Report and recommendations from the Measure J Audit of the City of Richmond's (City) Paratransit Program (Program). The two key recommendations from the audit report are as follows:

- The City should assign a new, full-time Program administrator to prioritize and implement recommended corrections; and
 - o Authority staff should consider establishing a Corrective Action Plan for the City's Program; and
 - o As part of these Program corrections, the City should assess the costs and potential benefits of transitioning its Paratransit service delivery to a contracted vendor; or
- Alternatively, a new West County entity could take over the Program.

As a next step in the process, CCTA asks the City to confirm, in writing, its intent and interest in continuing to operate West County senior and paratransit services by implementing recommended improvements from the audit report and CCTA staff. Please notify CCTA of your intent by July 20, 2024.

If the City indicates it will not continue West County senior and paratransit operations for a period in excess of 12 months from the date of this letter, CCTA will request the City enter into a Memorandum of Understanding to keep the existing services operating during a transition to a new managing entity.

If the City indicates its intention to continue West County senior and paratransit operations for longer than 12 months, then the City is to submit, no later than August 19, 2024, a letter of commitment outlining the City's plan and timeline for making improvements to the Program, including the assignment of a new, full-time Program administrator at the City; plans to assess contracted service delivery; and immediate resolution of the Cost Pool expense to the Program.

2999 Oak Road
Suite 100
Walnut Creek
CA 94597
PHONE:
925.256.4700
FAX: 925.256.4701
www.ccta.net

Please be advised that the CCTA Board is adamant the City take immediate and effective steps to improve the Program following the results of the audit. CCTA acknowledges and appreciates the cooperation of City staff throughout the course of the audit process and is confident that we can continue to work collaboratively to ensure that Measure J funds are being used to best serve those West County residents that rely on lifeline transit services.

Sincerely,



Newell Arnerich
Chair, CCTA Board

CC: Timothy Haile, Executive Director, CCTA
Rashida Kamara, Accessibility & Equity Programs Manager, CCTA
LaShonda White, Deputy City Manager of Community Services, City
Lori-Reese Brown, Project Manager II, City
John Nemeth, Executive Director, WCCTAC



July 20, 2024

Newell Arnerich, Chair
Contra Costa Transportation Authority
2999 Oak Road, Suite 100
Walnut Creek, CA 94597

Subject: City of Richmond Paratransit Service Measure J Audit Program 15 – Notice of Intent and Interest to Continue Operating West County Senior and Paratransit Services

Dear Newell Arnerich:

This letter is in response to the Contra Costa Transportation Authority's (CCTA) letter dated June 20, 2024, pertaining to the City of Richmond's Paratransit Service Measure J Audit Program 15. Per the direction provided in the letter, the City of Richmond is confirming its intent and interest in continuing to operate West County senior and paratransit services by implementing recommended improvements from the audit report and CCTA staff.

The City of Richmond intends to deliver our existing paratransit program during Fiscal Year (FY) 2024-2025 to ensure continued paratransit services for individuals who rely on it for their mobility needs. It is a service that the City of Richmond has proudly provided for over 48 years.

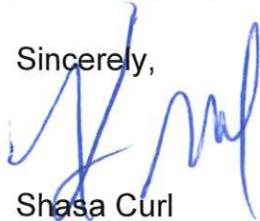
Per CCTA's recommendation, the City of Richmond will submit a letter of commitment and program improvement plan (Plan) by the by the deadline on August 19, 2024. This letter will outline our plan and timeline for making improvements to the program, including the following: (1) assignment of new personnel; (2) plans to assess contracted service delivery; and (3) immediate resolution of the Cost Pool expense to the Program.

Please note, the Plan submitted on August 19, 2024, will serve as draft of specific components of the Plan, such as resolution of the Cost Pool expenses which will require City Council direction. Richmond City Council is on recess until Tuesday, September 10, 2024. As such, City staff will present information to City Council at a September 2024 meeting and share an updated Plan with CCTA staff soon thereafter.

We would like to acknowledge and express our appreciation for the professionalism and support of CCTA staff, its consultants, and the Paratransit Coordinating Council throughout the course of this audit process. The City of Richmond looks forward to continuing to work collaboratively with the CCTA to make needed improvements.

If you have any questions or concerns, please feel free to reach out to me and/or LaShonda White, Deputy City Manager – Community Services, at lashonda_white@ci.richmonda.ca.us or 510-620-6828.

Sincerely,



Shasa Curl
City Manager
City of Richmond

Electronic Copy: Mayor Eduardo Martinez and Members of the Richmond City Council
LaShonda White, Deputy City Manager – Community Services
Nickie Mastay, Deputy City Manager – Internal Services
Timothy Haile, Executive Director, CCTA
Rashida Kamara, Accessibility Equity Programs Manager, CCTA



Measure J Audit

City of Richmond Paratransit - DRAFT

May 2024



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Background & Overview

Measure J General Overview

In November 2004, Contra Costa County voters approved Measure J to provide for the continuation of the county's half-cent transportation sales tax. Tax revenues are used for a variety of programs and projects, including Measure J Program 15 (MJ15), which funds Countywide Transportation for Seniors and People with Disabilities. The City of Richmond (City) is a recipient of Contra Costa Transportation Authority (CCTA) MJ15 funds as a provider of transit services for seniors and people with disabilities.

Program 15 funds include a Measure C guarantee and built in growth from Measure J. The growth portion of the funds is programmed to operators by West Contra Costa Transportation Advisory Committee (WCCTAC). Sub-regional program 20B funds are also programmed by WCCTAC, and under the Transportation Expenditure Plan (TEP) are to provide for an expansion of MJ15 funded services.

The City receives MJ15 funding for the county's unincorporated communities of North Richmond, Kensington, and El Sobrante based on a long-standing agreement between the County, City, and WestCAT. The funding allocation is based on a weighted percentage of seniors, people with disabilities, and low income in each community. WestCAT serves the other unincorporated communities in the area not served by the City.

Measure J revenues are limited to what the TEP directs. They are not intended to fully fund a city or other entity's transportation services.

Measure J Claims Requirements & Process

Requests for Measure J funds are made annually through a Claims (Claim) process. A Claim is both a request for funding and a reporting of prior years' projects. The Claim fund request is for the upcoming fiscal year. Reporting is for the latest closed fiscal year, period-to-date for the current fiscal year, and projections for the funding request year. The claimant's process should be to collect project data, translate it into the requested metrics, and use it to make a case for continued funding.

The City has been presumed eligible for the last five fiscal years, but their requests for funds have been inconsistent and the FY23/24 Claim submitted by the City was rejected by CCTA's Paratransit Coordinating Council (PCC), which reviews annual Claims and recommends award. Following an initial review, the City was asked to submit a corrected Claim. The corrected form was denied, and the PCC requested an audit of the City's program. The table below shows the status of the City's Claims for the five-year audit review period as of mid-April 2024.

FISCAL YEAR	CLAIM STATUS
FY19/20	FY18/19 and FY19/20 approved by CCTA following request for revisions and resubmittal. Funds allocated for multiple years by CCTA to City: Total for multiple years \$1,720,241
FY20/21	CCTA suspends Claim submittal due to Covid. Funds allocated by CCTA to City: \$697,973
FY21/22	Short-answer Claim response required by CCTA due to Covid. Claim submitted by City. Funds allocated by CCTA to City: \$326,468
FY22/23	No Claim filed by City. No funds allocated by CCTA to City.
FY23/24	Claim submitted by City. Issues with Claim triggered audit. No funds allocated by CCTA to City.

Richmond Paratransit Services

The City offers two transit services for residents of Richmond, North Richmond, El Sobrante, and Kensington. Eligible clients include seniors 55+ and people ages 18 to 54 with a qualifying disability. Clients must apply in advance showing proof of eligibility. Once determined eligible, clients can access both services.

R-Transit Paratransit

Per the City's website, R-Transit Paratransit demand-response service has been offered since 1976. It currently makes pick-ups weekdays between 8:45am and 4:15pm with trips scheduled by advance reservation. Customers can request a ride 1 to 30 days in advance for a \$4 one-way fare. Requests for same-day trips are accommodated on a case-by-case basis for a \$5 one-way fare. Fares are payable by ticket coupon which must be purchased in advance. Ticket books sell for \$20 each.

Door-to-door service is provided in a service area that includes Richmond, North Richmond, El Cerrito, Kensington, El Sobrante, San Pablo, and Pinole. R-Transit can accommodate clients using mobility devices and requiring the assistance of drivers to board. Clients can schedule unlimited trips.

Required Americans with Disabilities Act (ADA) paratransit service in West County is provided by AC Transit as part of the East Bay Paratransit Consortium. As the City's R-Transit program is not an ADA paratransit program, ADA paratransit requirements do not apply. However, for the senior and disability populations they serve, and because the program is funded with public tax dollars, the City should be mindful of its obligations under ADA Title II which requires state/local governments to give people with disabilities an equal opportunity to benefit from all of their programs, services, and activities.

Lyft Service

Lyft service was added in July 2018. Service is provided by Lyft drivers as part of their normal operations and the City pays a subsidy for the cost of the trip. Clients pay through the Lyft app for the first \$3 of the trip cost and any trip costs over \$20. Tips are paid at the discretion and expense of the client. Trips can be requested on demand, at any time or day, with no advance reservation required.

Per the City website, service is curb-to-curb and can accommodate mobility device users who are ambulatory, in that they are able to fold and store their device without assistance and can enter and exit the vehicle without assistance. The service area mirrors that of the R-Transit program with the addition of trips to the Veterans Hospital and Regional Medical Center in Martinez. Clients are limited to 40 subsidized trips per month.

Other agencies have grappled with the issue of providing a level of service to ambulatory clients that is not matched for clients requiring mobility assistance. For parity, the City's service, either operated with their resources, or by a third-party contractor, would need to provide wheelchair and other mobility-aid passengers with the same level of service as the Lyft program. ADA Title II prohibits discrimination based on disability. Again, the City's R-Transit program is not an ADA paratransit service, but that will not stop potential clients from requesting parity or filing a complaint for non-parity in services.

Other Services in West County

Other senior and disability transit services are available in West Contra Costa County:

- East Bay Paratransit serves ADA eligible riders, seven days a week with longer service hours and for a similar trip cost (\$4 minimum-distance based). It does not cover the entire Richmond Paratransit service area.
- WestCAT Paratransit is also limited to ADA eligible riders and overlaps a portion of the Richmond Paratransit service area at a lower fare (\$1.25 local/\$3 regional) six days a week.
- El Cerrito Easy Ride and San Pablo Senior & Disabled Transportation have the same client eligibility and service structure as Richmond Paratransit, and both also receive Measure J funding. They operate more limited days and hours, but at the same or lower fare (\$2 or \$4). Each is limited to operating within their city limits.
- Richmond Moves is an on-demand, app-based service open to the general public including seniors, within the Richmond city limits. Rides are free for seniors and students.
- Mobility Matters is a private non-profit that provides free rides from volunteer drivers to seniors and veterans without other transportation options.

Richmond R-Transit Paratransit service fills a need in the Richmond area, both geographically and with their eligible client base. They provide rides for seniors and those who may not meet eligibility requirements for East Bay or WestCAT Paratransit. They also cover areas of West

County not covered by other services. The City Lyft rides add another layer of service that would not otherwise be available by providing coverage on all days and hours, with no advance reservation. It is limited, however, to clients who do not need mobility assistance.

As the services closest in structure to the City of Richmond Paratransit, the City of El Cerrito and the City of San Pablo Measure J funded Paratransit services are used for comparison in this report.

Audit Overview

General Overview

- Purpose
 - The purpose of the City of Richmond Paratransit audit is to review the City's service and to understand anomalies and inconsistencies in past fiscal year Claims, triggered by concerns with the FY23/24 Claim. The audit was recommended by the PCC.
- Time frame
 - The audit was scheduled for a 90-day period from initial Kick-off to Final Report, dependent on the City providing the needed documentation for an appropriate assessment.
- Audit Scope
 - Review of annual Claims for a period of five fiscal years
 - Presentation of findings associated with non-compliance with the funding agreement.
 - Recommendations to address non-compliance findings as well as operational management recommendations.
- Areas of Review
 - Claims Submittal & Compliance
 - Budget
 - Key Performance Indicators
 - Program Design & Delivery
 - Marketing, Outreach & Feedback

Partners

CCTA Staff & Role

CCTA is responsible for the allocation and oversight of Measure J funds, the annual Claim process, and the audit process. Rashida Kamara, Accessibility and Equity Program Manager, led the audit effort for CCTA.

Audit Team Role – Advanced Mobility Group Staff

The Audit Team was led by Laurie Talbert. Laurie has 30 years' experience in public transit, including in the provision of Paratransit services. Kirsten Riker focused on the outreach and promotion overview of Richmond's service. Rose Quiroga-Clement offered administrative

support and as a native Spanish speaker, made inquiries to the City to assess their support of Limited English Proficiency (LEP) clients. Mike Mueller assessed the budget documents provided. Christian Kent, a well-known and respected Paratransit Consultant who trains agencies in providing services, joined the team to lend his professional expertise.

City of Richmond Role

The City was asked to cooperate with the audit by supplying requested documentation, attending meetings, including a Working Group Call to respond to questions, and accommodating the Audit Team for a Site Visit. The primary staff involved in the delivery of service and contributing to the audit included Lori Reese-Brown (Program Manager), Mary Cummings (full-time program administration), Hope Lattell (Finance), and LaShonda White (Community Services).

Audit Timeline & Steps

Kick-off Meeting and Data Request. March 4, 2024. Introductions were made and a data request list was reviewed. Data was requested to be uploaded to a provided Dropbox no later than March 15, 2024. Meeting notes are available as Attachment 1. Meeting attendees included:

- CCTA: Rashida Kamara
- Audit Team: Laurie Talbert
- City of Richmond: LaShonda White, Deborah Dabbs, Hope Lattell, Mary Cummings, Lori Reese-Brown, Nickie Mastay.
- WCCTAC: John Nemeth, Coire Reilly

Initial Document Review and Follow-Up Questions. March 16 to early April. The Audit Team reviewed the documentation provided and sent a list of questions regarding the budget documentation. City Finance and Community Services staff were responsive in providing answers. The Audit Team also made a follow-up request for program documentation that had not yet been provided for all fiscal years.

Marketing Audit - Richmond Locations. March 26, 2024. Kirsten Riker from the Audit Team visited five locations in Richmond, including two senior centers, the library, a community care and resource center, and a medical facility to look for outreach or promotional materials about the City's transit services and to ask facility staff what they knew about the programs. Notes are available as Attachment 2.

Working Group Call. April 9, 2024: The Audit Team provided the City a list of questions in advance of the meeting. The questions followed the flow of the City entries on the FY23/24 Claims Form. The City was again asked to provide the missing documentation that had not been uploaded to Dropbox by the original deadline. A new deadline of April 16 was established, and the Audit Team stated that they would start their analysis after that date. The City completed the upload of all prior year's Claims Forms but did not upload any other missing documentation. Meeting notes are available as Attachment 3. Meeting attendees:

- Audit Team: Laurie Talbert, Christian Kent
- City of Richmond: Lori Reese-Brown, LaShonda White, Hope Lattell, and Mary Cummings

Site Visit to City of Richmond. April 16, 2024. Laurie Talbert from the Audit Team visited the City of Richmond to observe the administrative and dispatch functions of the service, ride along with passengers, and ask additional follow-up questions about the service. LaShonda White and Debbie Dabbs were available for questions at the beginning of the visit and a ride-along was arranged with the part-time driver. Following the ride, Debbie answered additional questions. Mary Cummings, the full-time administrative staffer, called out sick that day and the Program Manager, Lori Reese-Brown, was not present. Following the visit, three additional budget questions were forwarded to LaShonda and Hope and they provided the requested information. Site Visit notes are available as Attachment 4.

Data Assessed

The Audit Team requested that the City provide the following for FY19/20 through FY23/24:

- Claims Forms
 - Submitted Claims – initial and revised
 - Explanation for years when a Claim was not made, for Covid or other cause
- Budget detail
 - Cost allocation by program
- Ridership detail – O&D pairs, days, and hours
 - Route Match ridership reporting
 - Explanation of what manual work is needed to provide detailed information
- Paratransit Survey results
- Write-up of City Cost Pool as it relates to program
- Public-facing materials for riders

The Audit Team received the following information and reports from the City as of the final April 16, 2024 deadline:

Documents Provided by City	FY20: July 1, 2019 - June 30, 2020	FY21: July 1, 2020 - June 30, 2021	FY22: July 1, 2021 - June 30, 2022	FY23: July 1, 2022 - June 30, 2023	FY24: July 1, 2023 - YTD (varied by report)
Detailed Customer Trips			X	X -Thru 4/23 only	
Mobility Kind Trip Count		X	X	X	
Vehicle Productivity Report		X	X	X	
Vehicle Productivity by Mileage			X	X -Thru 4/23 only	
Operating Statistics	X	X	X	X	X
Trips By Service Report					X
Lyft Service Ridership	X - 6 months only			X - 4 months only in password protected files	
Claims Forms or Explanation of no Claim	X	X	X	X	X
Budget Detail	X	X	X	X	X
Public Materials: Brochure and Client Orientatin Guide			Received		

While the Audit Team did not receive all the documentation requested, CCTA agreed that what was collected and reviewed was sufficient to assess the City's program.

Key Audit Takeaways

The Audit Team identified the key takeaways from the Audit. A more thorough assessment of individual review elements is included [in this report](#).

- City documentation is filled with errors and contradictory information.** There is data contained within Claims Forms that is contradictory to other notes within the same Claim. Claims include calculations that are illogical and were obvious within a few minutes to even those members of the Audit Team without direct transportation services experience. These issues should have been spotted and corrected before Claims were submitted. The review of Claims alongside other supporting documents and reports shows inconsistencies across multiple reports and data sets and across the five years of review.
- The same issues of inconsistencies and contradictory information can also be an indicator of a **lack of understanding of the basic metrics of the program** the City is operating. The audit indicates that a lack of understanding of the system is a contributing factor to the inconsistent and incorrect data and a failure to spot these issues by City staff. These issues made it difficult to assess the budget or program metrics, because the Audit Team had little confidence that reported data was accurate.
- City management is not actively engaged in leading the staff or program.** Administrative service delivery and program management staff disagreed on answers to some questions posed on the Working Group Call about daily operations and service metrics. Service-delivery staff could not answer questions about important program elements such as the status of new vehicles. Newer Finance and Community Services

staff seem to recognize the Claims trouble spots and understand the budget and flow of funds best. The full-time administrative employee knows the day-to-day system best but doesn't appear to have the authority to make cultural shifts or functional corrections to the program or service. No one person has the full picture or understanding of the program, or how it operates.

- **Positive Client Interactions.** The service delivery staff know their riders well and serve them with care. Similarly, the riders engage with the drivers in a positive and familiar way and express the importance and value of the service the City provides for them.
- **CCTA Forms and Oversight Needs Improvement.** The Claims Forms do not request all the detail that would be used to calculate other inputs within the form. The descriptions of requested data were unclear to the City in some cases. The questions listed in the Project Description Narrative are not sufficient to identify deficiencies in a transit operation. The Coop Agreement and Measure J Strategic Plan do not lay out service expectations or standards that a program must meet for continued funding. Oversight from CCTA has not been consistent over the last five fiscal years, but the addition of the Accessibility & Equity Program Manager role at CCTA should lend the process the needed leadership and expertise in paratransit operations going forward.
- **Administrative costs are out of alignment** with program costs and other, like programs. This is due in part to the assignment of indirect Cost Pool Administrative and Liability expenses that are equal to, or greater than, the cost of staff actively engaged in the program. Additionally, the cost of benefits as a ratio of the cost of payroll for those actively engaged in the program is high.
- **Lack of Customer Feedback.** The City is not actively soliciting feedback from customers, or seeking to understand the needs of those who are not riding. As a result, they are not mining opportunities to improve the customer experience or to solicit new riders.
- **Value of Service.** The service can fill a hole in West County by providing trips that are both needed and valued by its customers. It serves a vulnerable population with personalized service. The staff know their clients well and provide a measure of social interaction and sense of community that is also of value.
- **Lack of Promotion.** Given the gap that could be filled in the service market, and the rides available with their low-cost Lyft service, the City should be serving more passengers. The City is not actively promoting their service. While citing lack of resources as a limit to active promotion of their service, the City is also not maintaining low cost, passive forms of promotion such as their website and print materials.

- **Costs Limiting Growth.** Program expenditures shown in the FY23/24 Claim for the 3-year reporting period indicate no service or program growth, despite the noted increase in available funding each year. The City is currently operating with just 1.5 drivers and around eight one-way trips per day. While there is room in the full-time driver's manifest to make a few more daily trips to increase ridership, the projected spend of the program in the Claim does not support another full-time driver or any expansion of services.

Current State of the R-Transit Program

Using primarily the Site Visit, but also review of documents and the Working Group Call, the Audit Team's assessment of the current state of the City's R-Transit program is as follows:

Vehicles

The service operates with two 7-seat vans. The configuration of the vans has the tie-down for mobility devices in the center, in front of a two-seat jump seat and limiting access to one of the remaining three seats in the rear of the van. When a mobility aid passenger is aboard with their device, only one other person can comfortably ride. Most trips are single-client trips with room for an attendant. The front passenger seat can also be used, but the client or attendant would need to be physically able to step up into that seat or maneuver to it from the back of the van.

The mobility device ramp on the passenger side of the vans is manually engaged by the driver by pulling up and out on the ramp handle. It requires some strength to engage.

One of the vans is prioritized as the daily trip van with the full-time driver. The second van is used only when needed by the part-time driver.

Mechanical Issues: The part-time van would not shift into Drive for the ride-along trip during the Audit Team's Site Visit. It was known to the driver that the passenger-side sliding door had to be closed with a certain pressure for the vehicle to register that the door was closed. The van would not shift from Park to Drive if the door was not closed with enough force. It took about 15 minutes, but the driver and Audit Team member managed to correct the issue to travel to the first pick up, arriving at 10:25am for the 10:00am scheduled pick-up. The problem recurred at the client's home. Efforts to reset the door failed this time and the trip could not be completed. A tow truck was sent for the van and the client's trip cancelled. The other van picked up the stranded driver and Audit Team staff for a ride-along then returned to the base.

New Vehicles: Two new, larger electric R-Transit vans with rear wheelchair loading were parked at the City lot. [The purchase of the vans was approved by the City in September 2023](#) with \$268,861.76 in anticipated FY23/24 Measure J funds. [Additional documentation](#) notes that three Level 2 and one DC fast charger would be installed at the City's Corporation Yard to support the fleet.

According to the administrative staff and drivers present for the Site Visit, the new electric vans have not been put in service and cannot be used because the charging system is not compatible, and the vans can't be charged. It is not known if the noted charging equipment has been installed as indicated. Staff also stated that the van step is too high for seniors to board and there are no handrails to assist in boarding. Nobody that was asked during the Site Visit knew the status of the vans or who was responsible for getting the issues corrected so that the vans could be put into service.

Contracted Services

City staff stated that they are contracting with TransMETRO to provide trips when they don't have an accessible vehicle and/or driver to operate a trip and for same-day trip requests. In September 2023 the City approved a one-year [\\$250,000 contract with TransMETRO](#) to expand R-Transit service and conduct outreach with an anticipated 40% increase in ridership as a result. The [contract](#) outlines that costs are billed at \$92/hour for 8.5 hours per day, or \$782 per day for as-needed transportation plus outreach and marketing services of up to \$49,808. The Audit Team did not see any indication of active outreach for the R-Transit program performed by TransMETRO or the City. There's also no indication of an increase in Paratransit ridership. As no invoices were provided that would confirm how the City is being billed, it is not known if TransMETRO has billed the City for any outreach efforts, or how they are billing for rides.

Staff

The City's FY23/24 Claim form lists the following staff:

- 2 full-time drivers
- 1 part-time dispatcher
- 1 full-time administrative office staff
- 1 part-time administrative staff: Program Manager

Currently, one of the drivers is working under disability accommodation and drives only part-time. The vehicle records attachment for the same FY23/24 Claim Form indicates there were only 12 days YTD that both vans logged miles, so the part-time driver is rarely on the road. Per staff, the part-time driver has three roles and does administrative work in the AM if they don't have clients to drive, then takes over for the part-time dispatcher in the afternoon. Therefore, the current day-to-day staffing, confirmed by City staff at the Site Visit, is:

- 1 full-time driver
- 1 part-time driver: limited days AM trips
- 2 part-time dispatchers: including driver
- 1 full-time administrative staff
- 2 part-time administrative staff: Program Manager and driver

On the Working Group Call, staff indicated that the part-time administrative Dispatcher may also drive a van if a driver is not available.

Per the Site Visit, the office staff and drivers appear to be a close-knit group who communicate well with each other, using work-provided cell phones to manage changes in rides and to handle issues.

Clients and Trips

On the day of the Site Visit, Audit Team staff noted a total of nine one-way trips between the two driver manifests. City staff also shared manifest copies with the Audit Team. A copy of a driver manifest for the primary van from March 26, 2024, showed six one-way passenger trips. For March 27, 2024, seven one-way passenger rides. It is unknown if AM trips were made with the second van on those days. An evaluation of R-Transit ridership for FY21/22 (the only year that a full 12-months of data was shared) shows the Paratransit service ran 2,042 one-way passenger trips for 59 unique clients. In a 250 service-day year, the average would be eight one-way passenger trips per day between both vans, which aligns with the trips scheduled on the day of the Site Visit.

The drivers indicated during the Site Visit that passengers want to use the Lyft service because they can ride any day or time and it is less expensive at just \$3. The Lyft service cannot accommodate users who need mobility assistance, so the Paratransit service is largely operating for wheelchair and other mobility aid users who require assistance. The clients who spoke with Audit Team staff on the day of the Site Visit said they rely heavily on the Paratransit service for their transportation. They love the service, and they love their drivers.

The only Lyft service passenger count documents uploaded by the City that the Audit Team could access were for six months of FY19/20. That data was insufficient to accurately quantify how many clients are currently using the Lyft service, and because the Lyft ridership data includes just customer ID and not names, it cannot be discerned how many Lyft riders also use the Paratransit service. Like the Paratransit ridership that shows a small number of clients using the service actively, during the six months of Lyft ridership provided, the program delivered 657 trips to 77 unique clients.

Systems

Despite having a software system, all the actions witnessed on the Site Visit were performed manually. The service had just switched from Route Match to Via and the staff was still trying to learn the new software. The part-time driver who drove for the first attempted ride-along could not get her tablet operating. It did not accept her known log-in credentials. The driver stopped at the IT office for assistance. IT staff hit the 'temporary password' button which gave them a message to get their temporary password from their 'Dispatch Manager.' The driver did not know who that was so began service without the tablet using a paper manifest.

The second driver had access to the Via service on their tablet, but Audit Team staff did not witness the driver using it to record any information about the trip. The tablet appeared only to provide navigation between pick-up and drop-off points. The driver turned the volume down on the tablet because they didn't like the navigation it provided, preferring to drive a familiar route instead. This driver also had a paper manifest.

The paper manifests require that the drivers write in their run start time, first pick-up time, last drop-off time, and run end time as well as all break start and stop times. They also write in each client pick-up time, drop-off time and start and end odometer reading. Per City staff, this detail is turned in at the end of the day and manually keyed into the software system.

Also, per staff, the new Via program optimizes trip plans based on scheduling of one full-time and one part-time AM van. Because of the disability accommodation of the part-time driver, they do not transport wheelchairs, so the office staff manually overrides the software to move wheelchair riders to the primary driver.

Cited Needs

The administrative staff and drivers interviewed during the Site Visit all answered the same way when asked what they would improve about their own services. They all cited the need for more drivers, access to the new vehicles, and better training on the new Via software system.

Areas of Audit Review

Claims Submittal & Compliance

Review Items:

City-provided Claims Form, PCC meeting minutes, City-provided Route Match reports

Identified Issue #1:

Errors, inconsistencies, and contradictions in Claims Forms. A simple review of the FY23/24 Claim submitted by the City revealed a list of issues, some of which were highlighted by the PCC. Issues in that FY23/24 Claim include:

- The titled service area map inserted in two locations of the Project Description Narrative is not a map of the service area, but instead, a map of the city block of the Civic Center in Richmond. This is a simple error to spot and should have been corrected before submittal.
- The narrative cites '1,770 active clients presently registered in the database'. Table C lists FY22/23 Projected at 3,720 registered clients. Administrative staff explained on the Working Group Call that 1,770 was the more recent and accurate number, but there was no further explanation for the discrepancy.
- Table C asks for an *average* passenger trip distance. The City instead lists a range of 3-6 miles. As noted in the Claim Form, the average should be calculated as Revenue Miles divided by passenger trips. Using the YTD FY22/23 Revenue Miles total from the attached Vehicle Productivity by Mileage report would put the average trip distance at 438 miles which is clearly incorrect, and nowhere near the 3-6 mile range cited. It is unclear how the City generated the range reported in the Claim.
- Van vehicle mileage (odometer) reported on Table D doesn't match end odometer numbers on attached Vehicle Productivity by Mileage reports.

- Table A Fare Revenues for FY21/22 Actual were \$92,001, but Projected FY22/23 revenues were \$20,000. Staff could not explain the unusually high fare revenue for the reported 2,787 passenger trips (\$33 per ride), or why the figure was lowered so significantly for the next year's projections.
- As the City does not pay a subsidy for paratransit fares, the figure listed as Paratransit Fare Subsidy on Table A, should in fact, be the TNC subsidy for the Lyft service. However, the total value listed of \$132,914 Actual for FY21/22 does not make sense. The highest rate the City would pay for a Lyft ride is \$17 (The rider pays the first \$3 and the City pays the remainder to \$20). At that highest possible per-ride subsidy cost they would have carried 7,881 Lyft passengers. Total ridership between the two services was 2,787. It is unknown what other costs are being accounted for in this line item.
- The Table C-provided definition of Revenue Service Hours, and the industry standard, is 'Total Hours that a vehicle is *available* to pick up passengers'. The City Claim cites a 7.5-hour service day (9am – 4:30pm) and offers service approximately 250 days per year. For single-van service, the annual hours would be 1,875. Table C reports 1,200 Projected FY22/23 Revenue Service Hours for both vans.
- At the cited FY22/23 Projected Passenger Trips per Revenue Service Hour of 430 and Projected Revenue Service Hours of 1,200, the City would carry 516,000 passengers. The Claim cites 2,900 projected passenger trips. Conversely, if the projected passenger trips of 2,900 were divided by the Projected Passenger Trips per Revenue Service Hours of 430, the City would have offered just 6.7 hours of service for the year. The 430 figure is an obvious error and the disparity in total passengers that figure reflects should have been easily spotted and corrected before the Claim was submitted.
- Table C includes 'Fare Subsidy: Number of Tickets Sold' for the three reported years. City staff could not provide an explanation for the figures or what they represented during the Working Group Call. City Finance staff cited that the figures were a mistake and should not be there.
- The Vehicle Productivity by Mileage Reports attached with the Claim showed three occasions when impossible mileage was reported to a van. These were 18,936 miles, 595,039 miles, and 650,053 miles travelled, each by a single van in a single day. The total was 1,272,448 miles for the two vans YTD, which is clearly not possible. Based on daily odometer reads in the reports, the correct total is 8,551 miles. An obvious error such as this should have been spotted and corrected before the Claim was submitted.
- Additionally, the same reports showed one van operating 51 days YTD and the other 154 days with just 12 days overlapping. The staff chart in the narrative showed 2 full-time drivers, but two drivers would only have been needed on 12 days.
- The Project Description Narrative cites that "All Measure J Program 15 funds were expended in the past 3 years (2019-2022)", but Table A shows a FY21/22 Actual ending reserve balance of \$103,759.

Recommendation:

The fact that many of the contradictions and errors in the FY23/24 Claims Form were easy to spot, and that even after being called out, weren't corrected in subsequent submissions, indicates a lack of oversight, understanding of system metrics, and QA review. City staff either don't have the experience or understanding of their program to accurately report on it or they are not applying their experience to this process. As the source of revenue for their program, the City must prioritize Claim submittals. It may be necessary to engage new staff, or a third-party contractor, experienced in service delivery and program metrics, to manage the Claims process.

Identified Issue #2:

Failure to File Claims or Make Corrections. While citing a lack of resources as a reason for their limited promotion or limited services, the City has missed years of filing a Claim, has not submitted Claims in a timely manner, or has submitted Claims with data that the PCC has noted as inconsistent or incomplete, requiring resubmittal.

Recommendation:

The City must prioritize filing a Claim every year and addressing all issues noted in the Claims expeditiously.

Identified Issue #3:

Non-Compliance with Coop Agreement. While neither the Coop Agreement nor cited Measure J Expenditure and Strategic Plans address level of service, service quality, or performance expectations for Measure J funded programs, the PCC, per their bylaws, has the duty to 'Review annual claims for Measure C and Measure J funds, applications ... and make recommendations regarding these claims and applications as appropriate.' The PCC has made a recommendation for this audit based on the contents of Claims Forms and in response to questions about service quality and performance. Their request for an audit is their authority to question the City's compliance with the Coop Agreement.

Recommendation:

CCTA's Coop Agreement with Measure J fund recipients should include language that addresses minimum standards of service and performance expectations or should expressly cite the PCC's duty to determine if the transit entity is meeting performance expectations, and thereby the agreement. The consequences for failing to meet performance expectations should also be addressed.

Identified Issue #4:

Unmet Needs – The only record of Table E Unmet Needs reported in the FY23/24 Claim was for "Patrons outside your service area requesting rides". City staff identified this as callers who ask about service who do not reside in the service area. They also cite not keeping a log of calls

received. It is unclear how this Unmet Need is being recorded, if not through a call log. Other Table E categories not completed by the City include "Patrons inside your service area requesting rides outside of your service area" and "Number of same-day ride denials due to capacity." No numbers were added for these categories, though City staff noted during the Site Visit that they get requests for trips to Oakland and the City notes in their Claim narrative that '...same-day service is limited due to high demand if a same day appointment is scheduled.'

Recommendation:

The City should keep a log of all customer calls. That log can include checkboxes for each of the categories of Unmet Needs identified in the Claims Form. That information could prove valuable in assessing program needs and future changes or expansion.

Budget

Review Items: City provided budget documentation, Claims Forms

Identified Issue #5:

Lack of Budget Detail for Review. A Claim was filed by the City and accepted by CCTA for FY19/20. For FY20/21 and FY21/22, the Claim submittal process was suspended, or only a brief narrative was requested due to Covid. The City failed to submit a Claim for FY22/23, though they provided a Claim Form for that year to the Audit Team. The provided form is not complete and shows no program costs. A Claim was filed by the City for FY23/24 which includes program costs. The only complete Budget Detail to Claim comparison for reported Actuals is for FY21/22.

The City provided the full five years of program budgets, but invoices, expense reports, and receipts would all be required to do a full fiscal audit of program expenses. There is not sufficient back-up documentation to confirm what was spent and that direct costs cited were spent on the program. Additionally, because only two complete Claims were submitted for the five fiscal years of review, and they represent the first and last years, there is no way to track the flow of the expenditures to budget or to follow reserve balance.

Recommendation:

Future years' Claims must be complete so that true program costs can be understood, to allow for a rolling assessment of expenditures and reserves, and so CCTA can follow Claims against budget if needed.

Identified Issue #6:

Limited Detail Available Shows Inconsistencies. The two Claims years with program cost detail noted above do not match the budget detail provided by the City for the same year. While not all totals represent actuals, they are inconsistent enough to point them out.

- The FY19/20 Claim provided by the City to the Audit Team was not complete, but the CCTA approved version dated May 8, 2019, put the *Estimated* program year expenditures at \$1,110,000 while the same budget year detail showed an *Actual* program cost of \$687,134.26. The difference could reflect the first four months of the Covid pandemic that closed out the fiscal year.
- The FY23/24 Claim put FY21/22 *Actual* expenditures at \$959,525.00 but the same budget year detail showed *Actual* program expenditures of \$813,881.05.
- For FY22/23 the *Projected* program cost cited in the FY23/24 Claim was \$960,405.00 while the budget *Actual* put it at \$854,769.37.

And, as cited earlier, the FY23/24 Project Description Narrative cites that “All Measure J Program 15 funds were expended in the past 3 years (2019-2022),” but Table A shows a \$103,759 ending reserve balance for FY21/22.

Recommendation:

Future years’ Claims must be complete so that true program costs can be understood, to allow for a rolling assessment of expenditures and reserves, and so CCTA can follow Claims against budget if needed.

Identified Issue #7:

Cost Pool Indirect Costs Burden the Program. The City is charging an administrative and liability expense to the program as part of a Cost Pool distribution. The Cost Pool memos provided by the City as Attachment 5 indicate that the City has earmarked a much higher total Cost Pool expense to the program than they are charging against it. For FY22/23 the City consultant calculated an Indirect Administrative Charges Cost Pool expense to the “1003 Transportation Operation”, which includes only the Paratransit/Lyft services, of \$744,016, but charged \$220,202 to the service. They consider the \$523,814 difference a subsidy to the program. An additional \$41,058 was charged to the program for General Liability Cost Pool in the same fiscal year. If charged at the fully calculated administrative rate, the City would be burdening the program with a total of \$785,074 in indirect costs – 82% of the total Projected program expenditures for that year. It is unfathomable that the City’s calculations would result in that percentage of a program’s funding to an expense that does not directly deliver service or impact customers. The fact that the City lowered that value to 27% of projected program expenditures is a reasonable course of action, but the percentage burden against a program that provides services to a vulnerable population is still too high.

Recommendation:

The City's Paratransit program should request an exemption from City Cost Pool expenses or CCTA should set a limit on the percentage of indirect costs that can be charged against a Measure J funded project.

Identified Issue #8:

Imbalance in administration costs to operations costs. It is not clear from the Claim Form or the City-provided budget detail how they assign program costs to the Operations and General Administration categories in Table A of the Claims Form. The ratio they show is high, however, compared to the other West County services. For FY21/22 Actuals the General Administration Expenditure was \$465,066 and Paratransit Operations Expenditures plus the TNC Fare Subsidy cost was \$494,459, putting admin at 48% and operations at 52% of the total program cost. Comparatively, the City of El Cerrito Paratransit was 21% to General Administration and the City of San Pablo shows 9% to General Administration.

Recommendation:

As already noted, the Cost Pool indirect cost is putting a burden on the program and should be eliminated or limited to free up funds for the direct delivery of service. Assuming the Cost Pool expense is included in the General Administration Expenditure, pulling it from the program total and administrative expenditures would result in Administration Expenditures of 30% of the total program cost.

Identified Issue #9:

No cost allocation by program. The City budget does not breakdown costs by the R-Transit and Lyft programs. The Lyft program subsidy has been confirmed by City staff as the Professional Services line item in their budget, and easy to pull out. Other items such as Paratransit Scrip Books (Fare Revenue), payroll and benefits for drivers, and operator uniform costs can also be pulled into the Paratransit side, but other budget line items cannot easily be allocated to the two programs.

Recommendation:

To understand the true costs of the two programs and assess if contracted services are providing an overall lower cost ride, the two programs should be assigned percentages of shared costs to determine an estimated program allocation for future year Claims.

Identified Issue #10:

Balance of payroll to benefits. Per City response to cite their average ratio of benefits to payroll, they cited a City standard calculation of 85% of salary costs for benefits. For the five fiscal years of audit review, the Paratransit program benefits were higher than the City average, ranging from 92% for FY23/24 YTD, to a high of 118% for FY20/21.

Recommendation:

It is unclear why the benefits to salary ratio is higher for this program unless the longevity of staff – some noted being with the program for 25 years – is impacting costs with legacy or length-of-service benefits. The City should assess the issue to understand and validate the higher benefits cost ratio.

Identified Issue #11:

Cost per Passenger. The cost per passenger is high and is out of line with other, similar programs. The FY21/22 actual program cost was \$813,881.05 per the provided City budget detail. The FY23/24 Claim Form showed Actual FY21/22 passenger trips of 2,787 for a cost per passenger of \$292.03. By comparison, the City of El Cerrito Paratransit had a \$100 cost per passenger from expected revenue and the City of San Pablo's cost per passenger was \$83 for the same fiscal year. County Connection's National Transit Database records for 2022 show a \$79 cost per Paratransit rider.

Recommendation:

Again, the Cost Pool expense, as well as the higher-than-average benefits costs, are impacting overall program cost and the cost per passenger. However, removal of Cost Pool costs would only lower the FY21/22 cost per passenger to \$202.75, still well above the other services. The City must work from both sides to reduce the cost per passenger by lowering costs and increasing riders.

Key Performance Indicators

Review Items:

City-submitted Claims Forms, Working Group Call, Site Visit, City-provided Route Match reports

Identified Issue #12:

Lack of understanding of program metrics. City staff has relied on reporting from Route Match, but that information is inconsistent from report to report and staff is not always clear on what the information represents. Lack of understanding of metrics means staff have no way to recognize errors in them, so they are reporting out with errors and inconsistencies. This was clear on the Working Group Call. Staff could not agree on the definition or reporting of a trip, how fare revenue was defined across documentation, the existence of a mandatory \$2.50 annual client ID or how those funds were being accounted for, or how the % on-time performance was calculated, among other things.

The City provided six unique Route Match reports in response to the audit data request. Those reports were scattered over the five fiscal years requested, with no complete set of reports for any one year. The City was emailed a table of missing reports and asked to send the

documentation, then reminded on the Working Group Call to supply at least one full fiscal year of reports by the extended April 16 deadline. No additional reports were received. The most complete reporting year is FY21/22. See table below for an example of inconsistencies in the reporting provided by the City for that fiscal year. Only 'Guests', 'No Shows', and 'Cancels' match from across the five Route Match reports provided. Figures for all other metrics were different for each report provided for the same fiscal year. For Total Paratransit Passengers, for example, Route Match reporting varies from a low of 2,042 passengers to a high of 3,309 - a variance of 62% for the same fiscal year metric.

Route Match Reports FY21/22	Service Metric									
	Total Paratransit Passengers	Paratransit: Wheelchair	Paratransit: Ambulatory	Attendants	Guests	Revenue Miles	Revenue Hours	Revenue/Fare Revenue	No Shows	Cancels
Mobility Kind Trip Count		434	1,336							
Vehicle Productivity by Mileage						16,349				
Vehicle Productivity Report	3,309	467	1,420	1,272	150	3,878,655	815.62	\$ 7,910.00	36	
Operating Statistics	3,178			1,250	150	984,591	1,452.35	\$ 676.00	36	252
Trips By Service Report - <i>Did not receive for FY21/22</i>										
Detailed Customer Trips	2,042									
FY23/24 Claims Form data for FY21/22 Actuals	2,787 <i>(includes TNC)</i>	763					990.42	\$92,001.00	36	252

Recommendation:

Manual keying of handwritten manifest times and numbers is likely contributing to the errors seen on the Claims Forms, as well as inconsistencies in Route Match reports. Without a QA review by staff who understand the metrics being reported and the knowledge needed to make corrections, errors will persist. City staff need to work with Via to ensure that the system is set up in a way that lets them take the best advantage of any automated data logging. City staff also need training specific to the provision of paratransit services to understand performance metrics and standards of service, or a new staff person needs to be pulled into the program to provide the needed experience. Alternatively, service delivery could be contracted to an experienced vendor.

Identified Issue #13:

Lack of oversight and review of program reports. As the table above demonstrates, City staff are pulling Route Match reports with clear inconsistencies in metrics for the same time period. The FY23/24 Claims Form review demonstrates similar inconsistencies in reporting within the Claim and to supporting Route Match documentation. If someone is reviewing these documents, they are missing the obvious or they see the issues but are not correcting them before CCTA review. Administrative staff are not being held by management to a standard of report reviews, reconciliation, or quality, and thus a standard of service review and quality.

Recommendation:

City staff either need training specific to the provision of paratransit services to understand performance metrics and standards of service, or a new staff person or third-party contractor needs to be pulled into the program to provide the needed experience. An ongoing internal audit of various reports should be done, and a QA review of all supporting reports and documentation used for Claims Forms reporting must be completed before Claims submittal to CCTA.

Identified Issue #14:

Metrix requested in Claim submittal. The definitions of some metrics in the Claims Form confused City staff. For example:

- In the Claims Form, 'Total Passenger Trips' was defined as the '...movement of a person on a vehicle...', but per City staff, Route Match reports a single vehicle movement as one trip, regardless of the number of passengers on board. In the Claims Form, this is intended to be total passenger boardings, but staff were confused by the contradiction with internal reports using the word 'trip.'
- Average Trip Distance is requested but the total Revenue Miles is not part of the reporting, so there is no easy way for reviewers to validate the response given.
- There is no call-out for the unique service passenger totals, service hours, or miles. Reporting from the Lyft program does not include actual trip miles or duration, but claimants could be using the combined service total passenger number from the Claim Form to calculate metrics when the other side of the data set is not a factor (i.e. calculating total of passengers from multiple different services against Revenue Miles for just one service program).

Additionally, data that could prove helpful in assessing successful programs and those in need of assistance, is not being requested.

Recommendation:

The Audit Team provided recommended revisions to the Claims Form tables and Project Description Narrative to CCTA. The revisions should clear up data requests by claimants and help the PCC and CCTA more easily see highlights and deficiencies in funded programs.

Program Design & Delivery

Review Items:

Working Group Call, Site Visit

Identified Issue #15:

Low Ridership. Program ridership reported in Claims and cited in Route Match reports is low for the cost of the program and potential client pool. While data on total boardings is

inconsistent across reports, a total ridership for both the Paratransit and Lyft program in the range of 2,800-3,000/year is a fair assessment. In FY23/24 projections for El Sobrante Paratransit ridership were 2,080 and for San Pablo, 4,200. Both serve smaller geographic areas, have shorter service hours, and receive substantially less Measure J funding.

Recommendation:

The current state of the program, with the number and condition of operating vehicles and 1.5 drivers, limits the City's ability to carry more Paratransit riders with City resources. The provided manifests show multiple driver breaks and gaps between picks-ups for the primary van and driver where additional trips could be operated, but demand may not be there to fill those spots. The City is also contracting TransMETRO which would also increase their capacity, but again, demand may not be there. To increase demand, the City needs to commit to promoting its service and implementing a service plan to add drivers and vehicles, or contract more trips to TransMETRO. Additionally, the City needs to more precisely define and confirm Unmet Needs.

The limited Lyft program data received shows an average trip subsidy cost to the City of \$8.73. Staff time dedicated to assisting Lyft riders appears to be minimal. This program has the greatest potential with unlimited capacity, to increase ridership at the lowest cost. Robust promotion of this service could have an immediate impact on increasing overall program ridership.

Identified Issue #16:

Vehicles. The two current 2011 vans are in poor condition. One stopped operating properly during a client pick-up on the day of the Site Visit and was towed. The demonstrated need to force the door closed on the day of the ride-along is a safety concern. If the door is not stable, it could open mid-trip. The City has recognized the age and condition of the vehicles and purchased two new all-electric vans as replacements. However, according to City staff at the Site Visit, and evidenced by the fact that the service is still being operated with the two older vans, the new vans are not being used. Staff cited that they couldn't be charged. It is unknown what the exact issue is regarding charging of the vehicles. Staff also cited that the new electric vans weren't appropriately outfitted to board passengers at the side door because the step is too high and there are no handrails for support.

Recommendation:

To avoid cancellations or limiting trip scheduling, the City must prioritize issues that are preventing the new vans from being put into service. An examination of the maintenance program is also warranted to understand who is responsible for maintenance, the inspection and service maintenance regimen, and maintenance standards. If not done recently, the fleet should be inspected with respect to current condition and useful life.

Identified Issue #17:

Drivers. While the City's Paratransit drivers are both full-time employees, one drives only part-time due to a cited disability accommodation. They spend the remainder of their full-time hours assisting with dispatch functions and office duties. Vehicle logs for FY23/24 showed only 12 days YTD that both vans operated, so the part-time driver is not driving often. City staff also stated that they manually adjust daily ride scheduling to avoid including a wheelchair passenger on their manifest on the days they do drive.

Whether the limitation of 1.5 drivers is impacting ridership, or the daily ridership needs don't necessitate two full-time drivers is unclear.

Recommendation:

If they have not done so, the City should assess the fitness of its existing drivers to perform the duties of the job. Per the Audit Team Paratransit Consultant, paratransit drivers are typically expected to be able to lift 40 lbs. to be considered fit for duty. If it is not already, this qualification should be included in the job description and verified in the hiring process for any future drivers. The City should also assess if the dispatch and administrative needs require the extra time that the 2nd full-time driver is dedicating to them. At a minimum, the City should report on Claims Form the staffing that represents the day-to-day contribution of employees to the operation, rather than their official classification.

Identified Issue #18:

Rider ID Card. The Client Guide and City staff indicate that an Identification Card is required for all qualifying clients. City administrative staff on the Working Group Call were not in agreement over the need to renew the card annually and Finance staff were not aware that a card was required or that \$2.50 is charged per card. Nobody was aware of how the revenue for the cards was being reported. They did agree, however, that the card is not, in fact, required at the time of a trip or to purchase ride coupons, in contradiction to print materials. Instead, it appeared to be a way to requalify passengers as eligible for service based on their address.

Recommendation:

As the card appears to have no use to clients, and the revenue is not accounted for, the City should reconsider the need for the card. As an extra step to receive services with a \$2.50 fee, it is a barrier to onboarding new clients. If the card is being used only for requalifying clients based on address, the City should develop a simple, annual address verification process for clients.

Identified Issue #19:

Clients in Unincorporated Areas. As noted earlier, the City receives Measure J funding to provide service in the county's unincorporated communities of North Richmond, Kensington, and El Sobrante. The Measure J Claims Form requests detail on registered clients in unincorporated areas to validate the availability of service. City staff cited that that data must be manually culled from Route Match and that the effort is labor intensive. The two March manifests provided by the City included pick-ups and drops-offs at home addresses in unincorporated areas, so it is clear that a level of service is being provided. While there is no documentation to support the FY21/22 entry of 416 clients in unincorporated areas, the provided manifests support that they have clients registered outside of city limits.

While City staff indicated that Via will allow for this reporting, the Via contract provided by the City as Attachment 6 defines the data sets it provides, and there is no indication that it will provide that client detail.

Recommendation:

If Via does not, in fact, include that information, the City should inquire if a field can be added in the client database to indicate if the client's home address is in an unincorporated area. A simple Google map search of the address would show the administrative support staff if they should note an unincorporated address in that new field. Once the manual work is done to assess its existing client database, doing that search for each new client would take just a few minutes.

Identified Issue #20:

Fare Revenue. Fares of \$4/\$5 are in line with other Paratransit services in the area and higher than the average fare paid by a Lyft service rider. Per City staff, Fare Revenue is reported in Claim Forms as the value of ticket books sold, not the value of tickets collected from riders for the reported fiscal year. Other reporting for 'Fare Revenue' or 'Revenue' appears to be for the tickets collected, but staff could not confirm that on the Working Group Call. They were unaware that Fare Revenue was appearing in other report locations and weren't certain what it represented. That would explain why the Claims Form doesn't match the reports. However, the Route Match reports also don't match each other, as the earlier table shows. It also explains why a simple calculation of the total Fare Revenue does not equal an average \$4.50 rider fare multiplied by the number of passenger boardings.

Additionally, anomalies in the value of Fare Revenue in the Claims Form make no sense: a high of \$92,001 Actual fare revenue for FY21/22 to a low of \$0 Actual fare revenue reported collected for FY20/21 and FY22/23 in the budget detail provided. When asked about the high \$92,001 fare revenue year, City staff stated that they must have anticipated a service increase or other issue that would result in more riders. However, the \$92,001 was a fiscal year Actual value, not a Projected value.

Because Fare Revenue is for tickets sold, the City should have a liability record for tickets sold but not used. According to the Finance staff, they do not track that liability.

Additionally, all staff were unaware of where the \$2.50 per client annual Rider ID Card cost was being included as revenue – in the City general fund or to the Paratransit Fare Revenue. Finance staff were not even aware that an ID fee was being charged.

Recommendation:

The City needs to have a clear understanding of how Fare Revenue is defined for both the budget and in system reporting. If two unique values are used, they should be named differently and reported as 'Ticket Sale Revenue' and 'Fare Revenue'. A record of liability should be maintained for the outstanding value of tickets sold but not collected and if the required ID card is maintained, and used only for the Paratransit and Lyft service, it should be considered as program revenue. If, in fact, the 1,770 noted active clients are each required to obtain a new ID annually at a cost of \$2.50, it represents more than \$4,300 in revenue.

Identified Issue #21:

Staff & Driver Training. Per staff on the Working Group Call, driver training isn't needed. The reason seemed to be that because a Commercial Driver's License (CDL) is not required for vehicles with their passenger-carrying capacity, no special training was deemed necessary. The Audit Team confirmed that a CDL is not required. City staff instead noted that pre-Covid, an administrative employee with the program would ride along every six months or so to check that the drivers were operating the vehicle appropriately. In cases where a driver is not available, staff cited that an administrative employee would drive the van and that they could use training because '...she's not a driver', but she's pretty good.'

Per the Site Visit, drivers say that they need to turn in a photo of their valid driver's license annually and maintain CPR First Aid certification through the City. They stated that they receive no other training. Drivers cited that vans have insurance cards and accident kits on board, and they were confident that they knew the procedures to handle an accident.

When asked about drug testing, administrative staff didn't know if testing was done. The drivers are part of a union, but it is an administrative, not a drivers' union. All staff said they have no regular interaction or communication with the union; they just pay their dues. It appears that the union contract does not hold the drivers accountable to drug testing.

Recommendation:

At a minimum, and per basic program needs, any driver transporting members of the public, regardless of vehicle size, should have Defensive Driving Training with a

refresher every three years. The Audit Team's Paratransit Consultant noted that the ADA has a list of requirements for employees who work with customers with disabilities to be 'trained to proficiency' to include use and care of accessibility equipment; securement of mobility devices; sensitivity training; and understanding disability in general. While not an ADA paratransit service, given the specialized population they serve, drivers should, at a minimum, have mobility device training and training for working with riders with physical and cognitive disabilities. A training program should be implemented and maintained. Pre-employment and accident/incident drug testing should be required if it is not, and random drug testing implemented.

Identified Issue #22:

Personal Care Attendants (PCA). The City is carrying a high number of free PCAs compared to client passengers considering that they carry seniors in addition to passengers with disabilities. While inconsistent across the unique Route Match reports, for FY21/22, as the earlier chart shows, reported attendant numbers were around 1,250 compared to total Paratransit passengers of around 1,850 (approximately 1,400 ambulatory and 450 wheelchair). Based on these figures, two-thirds of riders are boarding with an attendant. City staff stated on the Working Group Call that they want clients to have a free attendant for all rides, and two if they need it. They don't certify or verify attendants, saying instead, that whoever can help them load is the attendant.

Recommendation:

Encouraging the use of Paratransit service PCAs can be beneficial in reducing customer incidents. However, the PCA is not a substitute for the driver, and the operator should not be delegating safety-related or rider loading responsibilities to PCAs under any circumstances. A transit entity cannot require that a rider be accompanied by a PCA and the ADA states that transit entity personnel must assist individuals with disabilities with the use of ramps, lifts, and securement systems. The possibility that attendants are being encouraged to ride with a client because of a driver limitation or other reason is concerning.

The Audit Team's Paratransit Consultant identified that in their experience, for ADA paratransit services, the percentage of clients bringing a free attendant is generally 14%-16%. As the City is around 67%, they should assess both the abilities of the current drivers to assist riders, make it clear to passengers that PCA's are welcome but not required, and that only one PCA is allowed per customer.

Identified Issue #23:

Software systems and data handling. Staff noted that they were no longer paying a fee to Route Match for the software. They cited purchasing the software '5-7 years ago' and no longer had any interaction, training, or support from Route Match. They recognized the software's

limitations and incompatibility with other IT services within the city, and had, at the time of the audit, secured a new software system with Via. It was expected to roll out on April 11, 2024.

On the day of the Site Visit the Via software was not working properly. One of the drivers could not log into their tablet, and IT was unable to help. The driver proceeded on route without using the tablet. The second driver had their tablet operating but turned the sound down because it was giving audio driving directions that were not their preferred driving route. The driver didn't engage with the tablet for the ride-along trip.

As the Route Match costs would not have been included in recent year's budgets, the new Via contract cost will be an add-on to the existing program costs, which will have an impact on overall cost and cost per passenger.

Recommendation:

Per staff, the Via training crew visited twice, but they moved too quickly and didn't give time for City staff to understand the system. Staff need additional training and support for the new Via software. They need a clear understanding of the system automation options, and how to make best use of the program, not only with their current limited capacity, but if the program can be grown. While City management staff seemed confident that new software would be a valuable tool in addressing program issues, they must also recognize that software is not a substitute for good program management, and both are needed to realize the full advantages of a software system.

Marketing, Outreach & Feedback

Review Items:

City-provided Lyft Brochure and Client Orientation Guide, program website, other entity websites, Marketing Audit

Identified Issue #24:

Website. The Richmond Paratransit website should be the primary source of public information for the R-Transit and Lyft services. It is presented on the City's website under a 'Transportation' parent page which also highlights biking, commuter resources, and other public transit services.

The Audit Team reviewed the website and found it to include basic information in English about the two programs, including service area, fares, and steps to apply. The information, however, is not current. The landing page for the Paratransit service includes a notice from 2018 stating that the office is relocating and a Holiday Service Schedule from 2019. Other pages within the program site also reference meetings to be held in 2019. Visitors to the page may question if the program is actively operating.

The Lyft brochure provided to the Audit Team does not list the website as a resource. Contrary to information submitted in Claims, no other link to the website was found on the websites of other municipalities or WCCTAC. Additionally, an incorrect link to the website is printed on the front of the Client Orientation Guide.

Apply Now

R-Transit with Lyft

Service Area

Scheduling

Groups Trips

Fares

Paratransit Satisfaction Survey

[Title VI \(English\)](#)

[Title VI \(Spanish\)](#)

Home » Departments » Transportation » R-Transit / Paratransit

R-Transit/ Paratransit

Mission

Since 1976, the mission of R-Transit is to provide safe and reliable transportation for seniors (55 and older) and individuals with disabilities so as to improve their access to community services and activities, to decrease their experience of social isolation, and to enhance their abilities to remain living independently in their chosen communities.

Location

Beginning November 5, 2018 the R-Transit program will relocate to:

440 Civic Center Plaza, 2nd Floor
Richmond, CA 94804
(510) 307-8026

Hours of Operations:

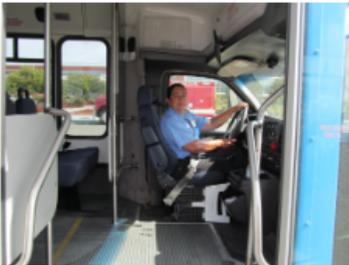
Monday - Friday (excluding weekend and holidays)
8:30 am - 5:00 pm

Map

Located on the 2nd floor at 440 Civic Center Plaza

R-Transit Holiday Schedule 2019

Holiday	Day Observed
New Year's Day	January 1
Martin L. King Jr. Day	January 21
Presidents' Day	February 18
Memorial Day	May 27
Independence Day	July 4
Labor Day	September 2
Admission Day	September 9
Indigenous Peoples Day	October 14
Veterans Day	November 11
Thanksgiving Day	November 28 & 29
Christmas Day	December 25
New Year's Day	January 1, 2020



IMPORTANT NOTICE TO CLIENTS

The City of Richmond's paratransit (R-Transit) program is partnering with transportation network company Lyft to provide on demand transportation. Lyft is a ridesharing application that connects people with a nearby driver and transports them to their destination.

The R-Transit program's newest addition, RAPID, offers R-Transit clients a subsidy to use Lyft for on-demand trips in the cities of Richmond, El Cerrito, North Richmond, El Sobrante, Kensington, San Pablo, and Pinole. RAPID will also expand service to and from the Contra Costa Regional Medical Center and Veterans hospital in Martinez, CA.

To learn more, visit <http://www.ci.richmond.ca.us/3747/R-Transit-with-Lyft>

Services

R-Transit is a program within the City Manager's Office that provides low-cost transportation services to seniors(55 and older) and persons with disabilities who reside in the City of Richmond and the unincorporated areas of East Richmond Heights, El Sobrante, Kensington, North Richmond, Hasford Heights and Rollingwood.

Eligibility Criteria

- To be eligible for the R-Transit Program, you must be either a resident of Richmond, North Richmond, El Sobrante, or Kensington.
- R-Transit serves clients 18 years or older. Applicants between the ages of 18-54 must provide proof of disability.

Recommendation:

The program website should be updated regularly. A website is the most basic information a program can offer, and the City is not taking advantage of what can be their most valuable information and promotional tool. As the program pages already exist, keeping them active and updated should cost the City very little.

The website should offer information in Spanish, or at a minimum, it should include a statement, in Spanish, citing a phone number to call for assistance. If the City has not already done so, the website should be made screen-reader compatible.

A QR code and short URL leading to the program website should be generated and added to print materials. City staff should reach out to jurisdictions, senior resources, and centers for independent living to request that a link to the pages be added to their websites.

Identified Issue #25:

Equity for Limited English Proficiency (LEP). A native Spanish speaker from the Audit Team contacted the primary information number, 510-307-8026, which appears on the website and Lyft brochure, and requested assistance in Spanish on two different occasions. In both instances, she was told “No Habla Espanol” by the person answering the phone who then terminated the call. The Audit Team member was not given the option to speak to someone in Spanish.

On the Working Group Call staff cited that they don’t have regular Spanish language assistance, but that the part-time driver is a native speaker. The budget detail cites an annual staff supplement for bilingual services. Per the Finance response to questions, the payroll supplement is paid to the part-time driver of the Paratransit service, so limited translation would be available only to riders of that driver’s vehicle or over the phone in instances where they are providing administrative support.

Recommendation:

This and lack of printed materials in Spanish is contrary to requirements of Title VI of the Civil Rights Act specifically, as failing to accommodate LEP persons is akin to discrimination on the basis of national origin. The City should connect with a translation services line such as AT&T, to provide consistent assistance in other languages over the phone. Print materials and website information should be available in Spanish or at a minimum, include a Spanish language statement with detail on how to receive language assistance. All materials should be made available, upon request, in large print, Braille, audio, or a digitally accessible format per the ADA.

Identified Issue #26:

Program Brochure. The City references a Lyft brochure in their annual Claims to CCTA. The brochure was provided to the Audit Team. The brochure is in English, and no Spanish language version appears to exist. No accompanying brochure specific to the Paratransit service appears to exist.

The Audit Team reviewed the Lyft brochure and found it to include basic information about the Lyft program, including trip cost, and steps to apply. It does not include a website address. The information, again, is not current, as the back panel of the brochure encourages potential users to attend 2019 workshops. As with the website, potential clients looking at the brochure may question if the program is actively operating. Additionally, the information blends promotion of the Lyft service with 'Hours of Operation' of the Paratransit service, confusing readers about when the Lyft service is available. The Claims Forms indicate that the Lyft brochures are available at '...senior centers, government offices, senior housing complexes, doctor/dental offices and anywhere seniors travel.' The Audit Team visited five senior and medical centers in Richmond on March 26, 2024, but did not find Lyft brochures to be available at any of the locations. A listing of the sites visited, and the Audit Team experience at these locations is available in Attachment 2.

Recommendation:

Ideally, the City should develop a new brochure with promotional information about both the Paratransit and Lyft services. The brochure should be available in English and Spanish, or at a minimum, it should include a statement, in Spanish, citing a phone number to call for assistance. The existing Lyft brochure should be updated, and the most valued attributes of the service highlighted. The brochure should include a QR code leading to the service website. The brochures should be delivered in inexpensive plexiglass holders to all the locations cited in the Claims Form and a business card or note added to the back of the racks citing who to contact to refill the rack. Printing costs should be minimal, and as a passive form of promotion, once new brochures have been delivered, staff time to restock should be minimal.

Identified Issue #27:

Client Orientation Guide. The City provided the Audit Team with a Client Orientation Guide during the Site Visit, and another was offered by senior center staff on an Audit Team visit to locations in Richmond. One Guide was dated 2020-2021 and the second was dated 2021 and included a 2021 Holiday Schedule. Both include a web address on the front: www.rtransit.com that opens to a site offering to sell the URL. The actual City site is <https://www.ci.richmond.ca.us/2880/R-Transit-Paratransit>.

The Guide includes information that does not align with information given by the City on the Working Group Call or at the Site Visit. For example:

- Clients are told in the Guide that No Shows or Late Cancellations will result in a charge equal to the fare. On the Working Group Call, staff said this is not their practice.
- One of the two Guides states that reservations can be made up to 10 days in advance while the other Guide, the website, City staff, and Claims submittals cite that reservations can be made 30 days in advance.

- The Guide outlines the need for an Identification Card, renewed annually, that must be shown to receive services or purchase ride coupons. Staff on the Working Group Call said that the ID is required but is never requested from a client. During the Site Visit ride along, the Audit Team staff witnessed riders boarding and purchasing ticket books and an ID was never requested.
- The Guide states that 'one certified' PCA will be allowed. Staff have stated that they do not ask for any certification and allow two attendants in some cases.

Recommendation:

Errors in the Client Orientation Guide should be corrected, and the booklet updated annually so that new clients receive accurate information. Updated Guides should be distributed to centers for independent living, senior centers, and other sites that are able to promote and share information about the City's services.

Identified Issue #28:

Client and Ridership Opportunities. Data from the City's FY23/24 Claim Form cites 1,770 active registered clients in Richmond's R-Transit program. According to the [United States Census Bureau](#), Richmond had a population of approximately 114,000 in 2022, with 14% aged 65 or older, representing approximately 16,000 residents. Richmond's R-Transit program is open to all residents ages 55+, which means more than 16,000 seniors are eligible for the R-Transit and Lyft services. As much of Richmond is an Equity Priority Community with a higher-than-average rate of poverty, access to low cost, on-demand transportation should attract a much larger user base than currently exists. The lack of users can be attributed, in part, to poor outreach and promotion.

Additionally, for the 2020 period that the City provided Lyft data, the average total one-way trip cost was \$11.85. After the subsidy, riders paid an average of \$3.12 per one-way trip. Less costly than the Paratransit service, and available all hours and seven days a week, there should be a significant untapped market for the program.

Recommendation:

Given the previously noted low cost of subsidized Lyft rides, the limited staff time needed to support the Lyft program, and the extended hours and days of operation it affords clients, the City should focus on robust promotion of the Lyft program to increase its client base and ridership. However, the City should also assess if the existing Lyft service must also be supplemented to provide parity in programs to accommodate customers in need of mobility assistance.

Identified Issue #29:

Customer Feedback. The City offers a Paratransit Survey on its website soliciting ratings on a variety of elements of its service including the reservation process, drivers, vehicles, and trip

delivery. The City provided the Audit Team with all survey submissions. Since 2015, they have received a total of 10 individual survey responses. The most recent was from 2018.

All surveys fall outside of the five-year window of audit review, and at just 10 total responses, are an insufficient data set to be used to assess the City's service. What is relevant, however, is that the survey is not being used.

Additionally, when asked if they kept a log of client feedback received via the phone, they said they do not.

Recommendation:

The City should contact all clients once per year, via mail or email, for the express purpose of soliciting feedback on their service. The survey should be featured prominently on the website in English and Spanish, and an option to call the City to complete the survey over the phone should be provided. Responses should be analyzed each year for ways to improve the customer experience. Third-party contractors are often used to manage and implement surveys for transit agencies, which not only saves staff time but also adds a measure of objectivity.

A log of all client comments, complaints, and commendations should be maintained and the information used to evaluate and improve the program.

Summary & Key Recommendation

The condition of the City of Richmond's Claims and their program have been an item for discussion at PCC meetings going back to 2019. In the last five years, no marked improvements are apparent in their Claims submittals. While Covid had an impact on all transit operations, other entities have demonstrated success in their recovery efforts and have stabilized their programs.

The City has made efforts to improve their transportation program, namely, its Lyft service, new vehicles, and updated software. For the service gap it fills, the City of Richmond's Lyft program has added value and new client options to their program, but without data from the City for ridership, or cost allocation for just the Lyft program, it is difficult to assess the program's quantitative success.

The two new electric vans would be very beneficial, but as noted in this report, they are not currently operational. Additionally, without two full-time drivers to operate the new vans, or outreach to attract new riders, the vehicles will continue to carry the same low number of daily passengers.

The impact of replacing Route Match with Via software has yet to be realized, as the system was new to staff at the time of the audit. As noted in this report, the manual entry of data, lack of understanding of metrics, and an unengaged management and unempowered staff are preventing the City from making the best use of the new software.

A senior and paratransit operation is needed to serve residents in this area of West County. The City of Richmond R-Transit program provides a valued service to a small, vulnerable population and the dedication of the drivers and administrative support staff to those clients is clear. However, the potential demand is not being realized due to the various issues documented in this report. The City's service is suffering from low ridership, high costs, and mismanagement.

As described in this report, identified issues touch every aspect of the City's transportation operation, and for the five years of review. As such, a complete shift is warranted. In this complete shift, the City will be required to turn over the program management to a separate public agency or new entity. An organization with an understanding of service metrics and standards, and an understanding of the needs of West County residents, such as WCCTAC, would be ideal.

If the service were to remain under the auspices of the City, a new, full-time administrator should be put in charge of the program to prioritize corrections, focusing first on issues of safety and customer care. The position should report directly to senior/executive management in the City. That person should have experience in the delivery of transit services for seniors and persons with disabilities. The service will be monitored and evaluated regularly by CCTA and other agencies, such as WCCTAC.

To enhance CCTA's responsibilities of the Measure J Sales Tax authority, it should develop a performance improvement plan for the City and schedule regular reviews of the program changes. The PCC should assume the role of monitoring the City's performance improvements. The City should also assess the cost and potential benefits of transitioning Paratransit service delivery to a contracted vendor.

Attachments

1. Kick-off Meeting and Data Request Notes. March 4, 2024
2. Marketing Audit Notes. March 26, 2024
3. Working Group Call Notes. April 9, 2024
4. Site Visit Notes. April 16, 2024
5. Cost Pool Memos provided by City
6. Via Contract provided by City

DRAFT

Attachment 1

Richmond Paratransit Audit Kick-Off

Monday, March 4, 10:30am

AGENDA + NOTES

Invitees/Attended:

CCTA:

Rashida Kamara

AMG:

Laurie Talbert

City of Richmond:

Lori Reese-Brown

LaShonda Wilson

Hope Lattell

Deborah Habbs

Mary Cummings

John Nemeth

Coire Reilly

Nickie Mastay

Cher-Lor Arce

Agenda:

- **Introductions of teams**
 - a. Richmond staff role in program
 - i. Lori – PM for program
 - ii. La Shonda – Deputy City Manager – Transportation/community services
 - iii. Hope-Finance Manager
 - iv. Cher & Nickie – Financial
 - v. Mary & Deborah- Clients
 - vi. John & Coire - WCCTAC
 - b. Identify project contacts
 - i. Lori/LaShonda – Program Administration
 - ii. Hope – Finance Contact
 - iii. John/Coire (WCCTAC) – Programming-Funding
- **Project Intro and Background**
 - a. CCTA overview
- **Next Steps – through end of March/early April**
 - a. Data – documentation collection
 - b. Working meeting with Richmond staff
 - c. On-site observations
- **Expectations for documentation – FY19/20 to FY23/24**

Per PM - City can provide documentation by end of next week. Audit Team will set up Dropbox.

- a. Claims reports – or no claim explanation
 - i. City - No claims in Covid year
 - b. Budget detail
 - i. City - Budget detail available end of next week
 - c. Ridership detail – O&D pairs, days and hours
 - i. City - Requires manual work + Route Match. Select a sampling?
 - ii. CCTA – manual work not needed at this point
 - d. Paratransit Survey results
 - e. Write up of City Cost Pool as it relates to program
 - i. City – Total document available. Write up may take longer.
- **Ongoing**
 - a. Bi-weekly check ins
 - b. Ongoing Q&A

Attachment 2

City Of Richmond MJ15 Marketing Audit March 26, 2024

Audit Team staff Kirsten Riker visited five locations in Richmond on March 26, 2024 to verify that reported marketing efforts were valid. The assessment was performed in a 'mystery shopper' format posing as a member of the public gathering information for a family member.

Details of the site visits are listed below:

- ***Richmond Senior Annex, 5801 Huntington Avenue***

Audit Team staff found no R-Transit, Lyft brochures, or other information on display at the Senior Annex. Annex staff was friendly, helpful, and complementary of senior transit services in Richmond, though unclear on service details of R-Transit and the Lyft program.

Senior Center staff used her computer to print a three-page application packet and told Audit Team staff that it could be turned in or mailed to the Civic Center Plaza for enrollment. While not sure of exact costs, she said some of the people who use the Annex also use the Lyft program and commented that she "doesn't think a lot of people know about it."

- ***Richmond Library – Main Branch, 325 Civic Center Plaza***

The Richmond library had no brochures about R-Transit and staff suggested I visit the nearby senior center for more information. The library displays AC Transit schedules.

- ***Richmond Senior Center, 2525 Macdonald Avenue***

Senior Center staff was friendly and helpful. R-Transit Orientation Guides (9 pages, stapled, in English, dated 2021 with a 2021 Holiday Schedule) were displayed on a resources table, along with color brochures for Richmond Moves (which were available in English and Spanish). No information about the R-Transit-LYFT program was on display. Senior Center staff mentioned a LYFT component but could not find any brochures.

Senior Center staff looked up information on her computer and provided three printed/stapled pages of information about it. While looking at the website she noted the outdated "upcoming workshop" (listed as November 18, 2019) on the program website and suggested to "just ignore that!" Staff could not say when the next workshop would be but said, "there should be more workshops set up to teach people all the ins and outs of this service." Staff indicated familiarity with at least one of the R-Transit drivers who apparently stops in every day for ice/water.

- ***North Richmond Center for Health / Community Resource Center, 1501 Fred Jackson Way***

No information was available about senior transportation services. Staff was helpful and looked online for paratransit information and wrote down phone numbers for two paratransit operators (Richmond Paratransit and East Bay Paratransit). She also started to mention Richmond R-Transit, but then said, "Oh wait, no, that's just a center. These are the ones to call [indicating the paratransit services she had already written down]."

- ***Richmond Care Center / Family Medicine (Sutter East Bay Medical Foundation), 2970 Hilltop Mall Road, #304***

The Richmond Care Center is a large, multi-story medical office building with various medical/dental offices. Audit Team staff visited the Sutter medical office as it appeared to have the largest practice on the directory. No brochures, posters, or other information was displayed in the main Care Center lobby or in the Sutter office/waiting room.

Attachment 3

City Of Richmond MJ15 Working Group Call April 9, 2024

Present:

Audit Team: Laurie Talbert (Audit Lead), Christian Kent (Paratransit Consultant)

City of Richmond: LaShonda (Community Services-CS), Lori (PM), Hope (Finance), Mary (Admin Staff)

Introductions and Coordination of April 16 Visit

Introduced Paratransit Consultant. For visit on 16th, City staff cited that 8:45am is first possible trip out, but Driver 2 has a trip starting later, so come after 9am. Send Admin staff cell number so they can update the time if needed. Riding with Driver 1. Second driver is part-time limited.

Status of Data Request

Acknowledge receipt of survey and Cost Pool detail. We still need the items in the table that were requested by the original deadline of March 15 and listed in a March 25 via email. Priority is for the Claims Forms. We need to complete our evaluation and start on the report. We need all remaining data by the day of the Site Visit, April 16.

	FY20: July 1, 2019 - June 30, 2020	FY21: July 1, 2020 - June 30, 2021	FY22: July 1, 2021 - June 30, 2022	FY23: July 1, 2022 - June 30, 2023	FY24: July 1, 2023 - YTD (varied by report)
Detailed Customer Trips			X	X - Thru 4/23 only	
Mobility Kind Trip Count		X	X	X	
Vehicle Productivity Report		X	X	X	
Vehicle Productivity by Mileage			X	X - Thru 4/23 only	
Operating Statistics	X	X	X	X	X
Trips By Service Report					X
Lyft Service Rides	X - 6 months only			X - 4 months only in password protected files	
Claims Forms					X
Budget Detail	X	X	X	X	X

Questions for City

Questions are based on FY23/24 Claims Form. One version comes from the CCTA PCC meeting minutes, the other uploaded by the City. They are not the same. These questions follow the PCC version. Note: Questions sent to City in advance. Not able to cover all questions. Notes include only those covered from the original list and follow-up questions asked on the call.

- PARATRANSIT FARES:
 - What is cost to rider per one-way trip?
 - City: \$4 one-way in advance \$5 same-day.
 - How many same-day trips do you take @ \$5?
 - City: Once a day or every other.
 - Are all passengers boarding the vehicle charged? - attendants, guests, guardians

- PM: Attendants are free – there can be more than one.
 - Paratransit Consultant: ADA allows one free attendant.
 - PM: We want them to have an attendant for all rides. If they need two attendants, we allow it.
 - Paratransit Consultant: Understandably, two attendants may serve different purposes
 - PM: Guests pay. I don't know what a 'guardian' is – maybe caregiver.
 - Audit Lead: It is referenced on one of your Route Match reports.
 - PM: I'm not sure.
 - How is fare payable?
 - Admin staff: Pay with a ticket. Driver sells them by check - no cash - and turn it into office. Also, can buy at the office and cashier window too. They collect \$20 per book.
 - Is the fare revenue based on tickets sold or tickets collected at the time of the ride?
 - PM: I believe Fare Revenue on Claim Form is tickets sold – not collected.
 - Paratransit Consultant: Is there any other way to pay?
 - City: No.
 - Audit Lead: How is the difference reconciled? You could sell \$1M in tickets and only \$500k have been used. Is this recorded as liability?
 - Finance: No. The liability is not recorded anywhere.
 - Is the same definition of 'revenue' used on all data where 'revenue' is reported? The numbers don't match Route Match reports.
 - PM: Not sure why those numbers wouldn't match. Not sure where the information comes from. Admin staff draws up the report. It could be based on what the manifest says is owed from riders – and they input what riders pay, so fare collected not tickets sold.
- HOURS: Please confirm hours for passenger contacts:
 - Service hours for first p/u time to last drop/off time
 - City: 8:45am/4:15pm last pick up – last drop-off could be 4:30pm. PM: We contract to a supplemental van service, TransMETRO. If we can't meet schedule, then we engage TransMETRO.
 - Reservation days/hours that a rider can call to request ride and #
 - City: 24/7 and leave message 510-307-8026. In person from 8:30am - 5
 - General information/customer support days/hours and #
 - City: 8:30am-5pm 510-307-8026. They only have a ½ time person – then Admin staff takes over. Admin staff and Dispatcher do it. PM: We formerly had a staff of 14, had to scale back.
 - What days/hours are Lyft users supported with ride scheduling assistance?
 - PM: Can call anytime to 510-307-8026. Admin staff has given their personal cell to assist people.
 - What do 'business hours' and 'office hours' represent? Both mentioned in claim form.
 - PM: 8:30am – 5pm They are the same thing. 510-307-8026
 - Is language translation offered on all these lines for all days/hours?

- Admin staff: We call HR and they will put someone on to translate.
 - PM: No. Right now it is only the part-time driver. They speak Spanish.
 - What languages are supported?
 - Admin staff: Not sure.
 - PM: Right now it is limited Spanish only.
- STAFFING:
 - Two full-time drivers are noted in Claims Form, but for FY24, claim vehicle logs show just 13 days when both vehicles recorded service miles. With just one vehicle operating most of the time, what does second driver do when not on the road?
 - PM: At the time we had two FT drivers. One driver's schedule was reassessed. They have a disability and can't lift things – restrictions. Sometime Dispatcher goes out to drive, that's why the two drivers are listed
 - PM: One part-time Dispatch, One full-time Admin, and PM is part time Admin as management.
- OPPORTUNITIES FOR FEEDBACK
 - Besides the online survey, what personal opportunities are there for client feedback?
 - PM: We work through the Commission on Aging and WCCTAC.
 - Do you keep a log of feedback you receive via phone?
 - Admin staff: No. Phone log for feedback is not kept.
 - When did staff last attend a Commission on Aging monthly meeting?
 - PM: In the last few weeks.
- ROUTE MATCH SOFTWARE
 - Does the city use software system independently? ie. generate all reports and do all data entry?
 - Admin staff: We generate everything and enter information
 - Does Route Match provide software support and/or training? Can you call with issues?
 - PM: Route Match has glitches. We had a contract, then we bought their software, but it is not compatible with City systems. Route Match does nothing for us now. We stopped paying for Route Match 5-7 years ago. New software from Via, based in Route Match reporting. More fields for clarity. Rolls out this week. They are doing training on 4/10. Needed new tablets – working with IT.
- CLIENTS
 - FY23/24 claim lists both 'Active Clients' (1,770) and 'Registered Clients' (FY2023 Projected 3,720). What is the difference between the two?
 - City: Active is the more current as active clients.
 - Admin staff: I look at obituaries and see when they stopped riding and remove them. We don't have as many active clients.
 - Is there a fee to register as a client?
 - Admin staff: They purchase an ID annually. \$2.50 each year.
 - Audit Lead: Do they show it to the driver when they ride?

- Admin staff: No. It has always been in place, but they don't need it to ride. If they don't get an ID they aren't eligible to ride.
 - Audit Lead: And they have to get a new one every year?
 - PM: No
 - Admin staff: Yes, we have them do it every year for \$2.50.
 - How does that cost factor into the budget or revenue?
 - PM: The money is City funds, but I don't know how it is accounted for.
 - Finance: I didn't know there was an ID or \$ collected for it
 - Admin staff: I'm not sure why we still do this.
 - Do clients ever have to reapply – proving continued eligibility?
 - Admin staff: Annually when they do the ID card.
 - Claim narrative states that Route Match doesn't provide a breakdown of people registered by incorporated and unincorporated. One version of claim form breaks it out – how were the numbers generated for the table?
 - PM: Route Match doesn't give us that. The new Via software will let us.
 - Audit Lead: What would it take from the City to be able to do this now with Route Match?
 - PM: Admin staff did it manually for the Claim Form and it took her a week.
- FARE REVENUE
 - Fare Revenue FY22 was \$92,001 actual but FY23 is \$20k projected. Why such a significant change?
 - PM: I don't know. With the supplemental service TransMETRO they were trying to serve more people, we must have figured we'd get a lot more riders.
 - Audit Lead: This was actual reported revenue, not a projection (Post meeting note – TransMETRO wasn't contacted until October, 2023 and would not have been a factor for FY22 revenue)
 - PM: Not sure. For the \$20K we didn't think we'd have the service. Not sure about the \$92k in fares.
 - How do you calculate projected fare revenue? What rider cost are you using?
 - PM: We look at how many people we might carry plus internal challenges. We thought we could use ECIA money, but could only be used inside Richmond.
 - Have there been any periods of time over the last five claim years when fares were not collected? If so, when?
 - PM: We never stopped collecting fares during Covid
 - If you had two full-time drivers, could you fill the vans?
 - PM: We want the option for 2 full-time van drivers so the passengers have options. It could be Lyft, Paratransit or TransMETRO. Union drivers – just 1.5 now, and only drivers for the city. They are part of the General Admin union.
- PASSENGER TRIPS
 - When did Lyft service start?
 - Admin staff: July, 10th 2018.
 - For 'Total Passenger Trips' on the Claims Form are you recording total Passenger Boarding counts?

- PM: Yes
 - Admin staff: No. It is the trip we count, not how many are on board-just the trip.
 - PM: No, we include both. It is everyone who boards a vehicle that is included.
 - Audit Lead: How does Route Match define a 'trip' then and what do you think the Claim Form is asking for with 'trip'?
 - PM: They are asking for trips
 - Admin staff: A trip is a single trip from one place to the other with a registered client – not all who board. Route Match gives us this.
- Do 'Total Passenger Trips' on Table C include both Paratransit and Lyft rides?
 - PM: Yes.
- Does number of Wheelchair Passengers on claims form represent total WC trips given or number of clients in database that use a WC?
 - Admin staff: Not sure. It should be total clients in wheelchairs.
- Do clients declare their PCA? Is the need verified by their Dr.? Both disability qualified and seniors? Is their name part of the manifest so driver knows who is eligible?
 - Admin staff: Yes, or they just show up. They cite an attendant when they are eligible. Self-declared for an attendant.
 - Audit Lead: So, no certification or check with doctor?
 - PM: Whoever can help them load is the attendant
- Are they each counted in passenger trip total?
 - Yes.
- Do they each pay a fare?
 - City: Attendants No. Guest Yes. Don't know what a guardian is.
- Can you confirm that reported trips are one-way trips?
 - PM: Yes.
- How are you calculating Revenue Service Hours?
 - PM: Route Match tells us what it is.
 - Audit Lead: Are Lyft hours included anywhere?
 - PM: No.
- How are you calculating Passenger trips per Revenue Service Hours. Are LYFT passengers included, but hours aren't?
 - City: We use total passengers from both services to do the calculation.
- How do you define a No-Show?
 - Admin staff: We get there and there's no answer.
- What if a passenger has repeated no shows? Do you have rider policies?
 - Admin staff: Policy was that you had to pay for the trip anyway, but we don't do that anymore. Repeated no shows are rare.
- How do you define a cancellation?
 - Admin staff: When they call in and cancel or do it at the door when we go to pick them up. No time frame for a cancel.
- Does the city ever cancel a ride for any reason?

Attachment 4

City Of Richmond MJ15 Site Visit

April 16, 2024

Present:

Audit Team: Laurie (Audit Lead)

City of Richmond: LaShonda (Community Services – CS), Deborah (Dispatcher), Drivers 1 (full-time) and Driver 2 (part-time)

Vehicles in Lot

There were three R-Transit vehicles in the lot. Van 1927 and two Electric vehicles. Van 1922 was already out on the road. Per drivers, it is the primary vehicle. 1927 is the back up because it is in worse shape. Richmond Moves had 12 vehicles in the lot in a variety of sizes, both electric and hybrid. Per Driver 2, the vehicles aren't shared and Richmond Moves uses Via contracted drivers. Audit Lead spoke with a Via driver who said that charging is tough as the chargers in the City lot are also used by the public and sometimes when he returns, they are full and he has no spot to charge. He has to take a chance on charging the next morning.

Per both drivers and Dispatcher: The new vehicles were secured by a former Transportation Department employee, and they cannot be used yet. They are intended to replace the two older vans. All three cited the same issues:

1. The charging system was incompatible with the charging units at the City, so they can't be charged.
2. The vehicles have a lift for WC, but don't accommodate seniors well. The first step is too high and there are no rails to hold onto for support when climbing the steps.
3. The vans aren't registered yet.

All three also stated they don't know who is managing the issues, how or when the problems will be resolved.

Office Visit Pre-Ride

The office was hard to find. Audit Lead didn't find the Cashier's Desk while they were there.

CS, Dispatcher and Driver 2 were there. Because full-time Admin Staff was sick, Dispatcher was at the phones. Driver 2 had two AM trips (a round-trip for a single rider) then would relieve Dispatcher when they left at 12:30pm. Driver 2 acts in an admin capacity when not driving. Driver 2 is a full-time employee but does primarily admin work as they only run extra AM trips that are not WC. They have a disability accommodation and admin does not book trips for them for WC passengers.

Dispatcher gave Audit Lead a manifest sample. They are printed with the ride pick-up info, but the driver enters all times and odometer readings. Those are manually entered into the system the following day.

Asked CS if 'Transportation Services' is R-Transit only. Per CS, as long as it is coded for 1003, it includes only Paratransit. Audit Lead requested a TransMETRO invoice, additional information about the Cost Pool General Liability charge that was not addressed in the Cost Pool Memo, and

detail about how they were paying for the Via system – a one-time cost or a monthly SaaS. (Audit Lead followed-up with an email the next day detailing the request and received the additional Cost Pool and Via information)

Via rollover: It was the first week. They couldn't get the tablets operating – they would not accept the passwords. Via came only twice for training, and they moved too fast and didn't give time for notes. The staff needs more help.

Ride along with Driver 2

Driver 2 and Audit Lead started by going to the IT office because the driver tablet would not let them log in with their password. IT could not help them. The 'forgot password' gave a response saying to get your temporary password from the 'Dispatch Manager', but neither knew who that was. They opted to proceed without the tablet, as driver knew the client well and knew where she lived. Driver 2 and Audit Lead went to van 1927. Driver 2 had a single round-trip rider pick up for the day. The van was stuck in Park and would not shift into Drive. Driver 2 cited that if the door is not closed properly, the van won't shift into Drive. They opened and closed the right-side slider, pushing on it to close it tight. It still would not come out of Park. As staff had already identified that the driver had a disability accommodation, Audit Lead was not comfortable with the force they needed to use to try to get the back side of the door latched. Audit Lead tried with the same result then circled the van and saw a seatbelt sticking out of the left sliding door. Audit Lead opened the door, cleared the seatbelt then closed it and the van released from Park. Driver 2 noted that they would not stop the van at the first pick up, as they were afraid it would lock up again.

Arrived to pick up the passenger at 10:25am for her scheduled 10am pick up. She had a walker and boarded independently. Driver 2 secured her lap belt, then the walker. The passenger was out of ride coupons and gave a check for \$20 to purchase a new book. Driver 2 took four, \$2 tickets from the book to pay for both trip directions, as they would be waiting at the drop off location to return the client back home. The client acknowledged that the van was late but praised the service and drivers.

Ticket System

The drivers have a stack of books, numbered, and a sign-out sheet in the glove compartment. Checks are returned to the office at the end of the day, but the sign-out sheet which logs the rider, ticket book number, and total collected, remains in the van until all coupon books have been sold.

At the end of the shift the drivers turn in their pre and post ride checklist, their manifest, any checks they received and the ticket sign-out sheet if it is full.

Driver 2 had, in fact, shut off the van upon arrival, and the van would not shift out of Park again. Both the driver and Audit Lead tried opening and closing the two doors, pushing hard to lock them in place, but could not get the van to release from Park. Driver 2 called Dispatcher who cancelled the rider trip and called to have the Maintenance Yard pick up the van with a tow truck. They also arranged for Driver 1 to pick them up before their next client trip.

After the passenger was deboarded Audit Lead asked Driver 2 about the service and what changes are needed while waiting for Driver 1. They said, 'We need help'. They need training in the new Via

system, they need the new vehicles to be outfitted properly and working, and they need more drivers. They said they don't get enough money to run the service – they 'need more money'. They said it is a good service, and the riders like the drivers. They are sending trips to TransMETRO because of the van issues, and Driver 2 limitations, but the riders don't want to ride with TransMETRO and will often change their trip time to one where they are sure the City van can pick them up. Driver 2 said they were fearful that the audit will shut down the Paratransit service.

Per Driver 2, more passengers want to use Lyft because of the hours and because it is just \$3, but only the ambulatory can ride. And they don't understand that they have to apply for R-Transit first to use it. 'People just don't understand.' Driver 2 also cited that if a rider makes less than 50k/year they get the trip free. (Audit Team could find no information about a low-income program)

The drivers have City-provided cell phones to speak to each other and the Dispatcher.

Per Driver 2 – Pre-Covid they may have multiple riders at a time, but now it is mostly just one at a time. The set up of the WC area appears to comfortably only allows for one WC passenger with one ambulatory at the same time – could be an attendant.

Driver 2 insisted that they drive the van regularly, but Dispatcher indicated (and vehicle records support) that they only drive occasionally.

Ride along with Driver 1

Driver 1 arrived at the inoperative van and was able to shut the door to allow the vehicle out of Park. Says they 'knows the magic trick' to closing it. They advised Driver 2 to cancel the tow and drive directly to the Maintenance Yard. Driver 2 called Dispatcher who said Maintenance wanted it towed. Driver 2 moved the van out of the lot where it was blocking cars and onto the street. They were advised to leave the key under the mat and the door unlocked. Driver 2 was fearful after the van drove away that the ticket books and check they had received would be stolen from the van.

Driver 1 drove to their pickup for a wheelchair client. It was an 11am pick up. On the way, their tablet was giving driving directions. They turned the volume down saying they like their route better. Because they had assisted Driver 2, they arrived at 11:15am. They said they have a 15-minute window (On the Working Group Meeting, City staff cited 20-minute.) Driver 1 loaded the client, she moved to the seat, and they secured her wheelchair. Driver 2 belted her in. They collected four \$2 tickets for both directions of her trip, as the same driver would be taking her home later. Driver 1 did not use the tablet for any part of the trip, instead recording rider pick up time on a paper manifest. Her drop off was at the city, so the group returned to the office and Driver 1 took their lunch. Driver 2 confirmed that the tow was complete and drove their car to the Maintenance Yard to recover the tickets and check.

When asked about training, both drivers said they receive no special training. They have to keep a valid license and give a photo of it each year. They also maintain CPR/First aid, attending City classes to keep renewed. When asked, Driver 1 cited that onboard they have their insurance card and an accident kit and that they were comfortable with knowing how to handle an accident.

Audit Lead asked Driver 1 what they would improve in the service:

- They need more drivers, and should stop using TransMETRO for trips

- They need new vehicles, but not those new electric vans – gas vans. They think charging will be too hard and they already have a key to fill up at any of the City fuel spots. They also said they didn't know what was happening with the new vehicles and why they weren't being fixed.
- If Via was working it would be okay. One complaint is that it gives out loud driving directions, but drivers know better how to get there. Also, the mapping doesn't include points of interest so they can't use location name for pick-up and drop-off – it has to be a street address.

Office Visit Post-Ride

Audit Lead spoke with Dispatcher, asking follow-up questions:

1. Do you have a rider guide or info you give them?
 - a. Yes. Gave a copy (dated 2020/2021)
2. How many days in advance can a rider reserve?
 - a. They prefer 3-4. One day isn't enough time because it is harder to schedule in and TransMETRO needs their trip info the day before if possible. They can take up to 30 days ahead.
 - b. Appointment returns are scheduled the same time as the pick-up, so the only same-day requests they receive are for entirely new trips. If they are AM they can sometimes work them into the Driver 2 schedule. It doesn't work for TransMETRO because they send the manifest the day before. (Note: this does not align with statements by staff on Working Group Call that TransMETRO is used for same-day trips)
3. Will the Via system involve any other system changes?
 - a. Not sure. The system has an 'optimize' feature that schedules the ride but they don't use it because it gives wheelchairs to Driver 2, and they can't take them, so they still manually schedule.
 - b. They need more training on Via to know it better. They came just twice and it was many months apart. They printed out their guide and are trying to train themselves.
4. Drug testing of drivers/union?
 - a. They know they are part of the union because they pay dues, but otherwise they don't really know anything about it. No random drug testing – they have never been tested or the drivers either that they know of.
5. What would you improve about the service?
 - a. Want more drivers
 - b. Need resolution to the vehicles. Why don't they have them to use?
 - c. Otherwise, things are running smoothly.
 - d. They didn't understand why they couldn't serve other people – they get calls sometimes and they have to turn them down. They get lots of ride requests to Oakland.

COMMUNITY SERVICES DEPARTMENT



Transportation Division

April 4, 2024

RE: Cost Pool

The following is a brief explanation of our cost pool provided by the Deputy Director of Finance, Mubeen Qadar in the draft budget staff report pages 10 and 11 on June 7, 2022. While the Cost Pool allocations are significant, the City's General Fund subsidy to Transportation Operations for FY2022-23 was \$523,814.

- **Cost Allocation Plan (CAP) Indirect Administrative Charges** allocates the cost of the City's Central Divisions to the Services divisions of the City. The CAP has always been prepared by a third-party consulting firm, however, in prior years it was never fully operationalized. The May 3, 2022, draft budget included charges based on the CAP prepared for the FY 2021-2022 by NBS Consulting compliant with title 2 CFR, part 200 federal guidelines. The current proposed budget for FY 2022-2023 deviates from the NBS CAP and adopts five percent incremental charges from the FY 2021-2022 budget. The change in the strategy means the General fund is providing a total subsidy of approximately \$2.5 million to the subject programs (see Table 8).

Table 8: Cost Allocation Plan (Indirect Administrative Costs)

Fund	Description	FY 2021-22 BUDGET	FY 2022-23 CAP*	FY 2022-23 Draft Budget	FY 2022-23 Subsidy
1003	TRANSPORTATION OPERATION	209,716	744,016	220,202	523,814
1012	HILLTOP LANDSCAPE MAINTENANCE DISTRICT	58,375	228,193	61,294	166,899
1015	MARINA BAY LANDSCAPING	34,312	193,954	36,028	157,926
1018	RENT CONTROL	52,481	377,170	52,481**	324,689
1050	CR-PLANNING & BUILDING	840,806	1,095,984	882,846	213,138
1051	CR-ENGINEERING	-	54,291	-	54,291
1055	ENCROACHMENT SVCS	3,192	148,971	3,352	145,619
1200	HOUSING ADMINISTRATION	190,087	91,189	105,019	-
1201	CDBG	25,641	10,841	26,923	-
1205	EMPLOYMENT & TRAINING	-	829,110	411,201	417,909
4001	PORT OF RICHMOND	428,033	235,792	449,435	-
4003	WASTEWATER	330,310	728,090	346,826	381,264
4006	STORMWATER	86,219	106,905	90,530	16,375
4008	KCRT - CABLE TELEVISION	167,612	201,235	175,993	25,242
4404	RHA-NEVIN PLAZA	-	78,878	78,878	-
4405	RHA-NYSTROM VILLAGE	-	41,183	41,183	-
4501	RHA-CENTRAL OFFICE	-	20,374	20,374	-
5001	INSURANCE RESERVES	490,618	627,322	515,149	112,173
6102	SA-ADMINISTRATION	50,000	1,829	13,896	-
	Total	2,967,402	5,815,327	3,531,610	2,539,339

*CAP = Cost Allocation Plan (Indirect Admin Charges) prepared by NBS Consulting

**Rent Control CAP is recommended to stay unchanged, the attachments will be updated for June 21 Council Meeting



Transportation Division

April 22, 2024

RE: Cost Pool – General Liability

The following is a brief explanation of our General Liability portion of the cost pool provided by the Deputy Director of Finance, Mubeen Qadar in the draft budget staff report page 9 on June 7, 2022.

Workers Compensation and General Liability: Rates are generally derived from the Actuarial report that factors in several drivers around the number of existing claims and expected claims depending on the existing risk and targeted confidence level of the Risk Reserve. The initial rates, in the proposed draft budget presented on May 3, 2022, were to achieve 65 percent confidence Risk Reserve level, resulting in significant increases in charges from the current year budget level. To avoid drastic budget increases to the City departments, the City staff proposes that the increase in the confidence level should be implemented gradually over several years. Until the City develops a formal plan for the Confidence Level increment, the proposed draft budget for FY 2022-2023 is set to increase the General Liability Charges by five percent city-wide from the FY 2021-2022 budget level. Workers Compensation charges are only increasing by one percent in each category listed in Table 7 below.

Table 7: Workers Compensation Proposed Rates for FY 2022-2023

	FY 2021-22 Rates	FY 2022-23 Rates
Worker’s Compensation Clerical	7.83%	8.83%
Worker’s Comp Fire	18.65%	19.65%
Worker’s Comp Professional	5.8%	6.8%
Worker’s Comp Police	22.08%	23.08%
Worker’s Comp Maintenance	12.71%	13.71%

Attachment 6

**CITY OF RICHMOND
CONTRACT AMENDMENT**

Department: Transportation	Project Manager: Denée Evans
Project Manager E-mail: Dene.evans@ci.richmond.ca.us	Project Manager Phone No: 621-1718
P.R. No:	Vendor No: 15056
P.O./Contract No: 5755	
Description of Services: TECHNOLOGY AND TECHNOLOGY ENABLED INTEGRATED SERVICES FOR ON DEMAND LOCAL ELECTRIC SHUTTLE	
Amendment No. 2 modifies the: (2nd or subsequent amendments attach Amendment History page)	
<input type="checkbox"/> Term, Payment Limit and Service Plan	<input checked="" type="checkbox"/> Payment Limit and Service Plan
<input type="checkbox"/> Term and Service Plan	<input type="checkbox"/> Service Plan

The parties to this Contract Amendment do mutually agree and promise as follows:

1. Parties. The parties to this Contract Amendment are the City of Richmond, California, a municipal corporation (City), and the following named Contractor:

NOMAD TRANSIT, LLC

Company Name: _____

Street Address: 10 CROSBY STREET, FLOOR 2

City, State, Zip Code: NEW YORK, NY 10013

Contact Person: GARRETT BRINKER

Telephone: (574) 286-4710

Email: GARRETT.BRINKER@RIDEWITHVIA.COM

Business License No: _____ / Expiration Date: _____

A California corporation, limited liability corporation general partnership, limited partnership, individual, non-profit corporation, individual dba as [specify:] _____
 other [specify:] Delaware, LLC.

2. Purpose. This Contract Amendment is being entered into to amend the Contract between City and Contractor which was approved by the City Council of the City of Richmond or executed by the City Manager on October 19, 2021, which **original** term commenced on October 1, 2021 and terminates July 7, 2024 with an **original** contract payment limit of \$1,000,000.00. Said contract shall hereinafter be referred to as the "Original Contract" and is incorporated herein by reference.

3. Original Contract Provisions. The parties hereto agree to continue to abide by those terms and conditions of the Original Contract, and any amendments thereto, which are unaffected by this Contract Amendment.

4. Amendment Provisions. This Contract Amendment is subject to the Amendment Provisions attached hereto, which are incorporated herein by reference, and which control over any conflicting provisions of the Original Contract, or any amendment thereto.

5. City of Richmond Business License Active Status Maintained. Pursuant to Municipal Code Section 7.04.030, the Contractor must maintain its City of Richmond business license for this Contract Amendment to be deemed to be in effect.

6. Insurance Coverage Updated and Maintained. Pursuant to the Original Contract, the Contractor shall provide the City with updated insurance certificates, and the Contractor shall maintain insurance coverage, for this Contract Amendment to be deemed to be in effect.

7. Signatures. These signatures attest the parties' agreement hereto:

CITY OF RICHMOND, CALIFORNIA
a municipal corporation

DocuSigned by:
By Eduardo Martinez
086C427628CC481...

Title: Mayor

I hereby certify that the Original Contract and this Amendment have been approved by the City Council or executed by the City Manager.

DocuSigned by:
By Ursula DeLoa, Deputy City Clerk
DE73F2339944495...
City Clerk

Approved as to form:

DocuSigned by:
By JA For
0F098C1E4C50485...
City Attorney

List of Attachments:

- 1. Amendment Provisions
- 2. Updated Insurance Certificates

CONTRACTOR:
NOMAD TRANSIT, LLC

(*The Corporation Chairperson of the Board, President or Vice-President should sign on the line below.)

By _____

Title: Manager

(*The Corporation Chief Financial Officer, Secretary or Assistant Secretary should sign on the line below.)

By: _____

Title: _____

(NOTE: Pursuant to California Corporations Code Section 313, if Contractor is a corporation or nonprofit organization, this Contract (1) should be signed by the Chairperson of the Board, President or Vice-President and the Chief Financial Officer, Secretary or Assistant Secretary; (2) should have both signatures conform to designated representative groups pursuant to Corporations Code Section 313.

Contract Amendment between the City of Richmond and
NOMAD TRANSIT, LLC

Amendment No.

2

P.O./Contract No.

5755

AMENDMENT PROVISIONS (PAYMENT LIMIT AND SERVICE PLAN)

1. Paragraph 3 (Payment Limit) of the Original Contract is hereby amended to increase the payment limit by **\$312,500.00**. Paragraph 3 of the Original Contract is amended to read as follows:

"3. Payment Limit. City's total payments to Contractor under this Contract Amendment shall not exceed **\$1,650,731.00** including expenses."

"The City of Richmond shall not pay for services that exceed the Contract Payment Limit without the prior written approval of the City Manager if the total Contract amount does not exceed \$10,000 or without the prior approval of the City Council if the total Contract amount is over \$10,000."

2. The Service Plan (Exhibit A) of the Original Contract is hereby amended to include the following tasks and/or services:

See attachments for:

- i. Additional TaaS vehicle hours to the current contract and
- ii. SaaS paratransit service order that outlines the project scope for our paratransit software

**Amendment #2
to the
City of Richmond Standard Contract**

Nomad Transit, LLC (“Via”) and the City of Richmond (“Customer” and, together with Via, the “Parties”) have entered into that certain agreement titled City of Richmond Standard Contract (the “Agreement”), dated October 1, 2021. Upon execution of this Amendment #2 (the “Amendment”), the Parties agree to modify the Agreement as follows:

1. Paragraph 3 (Payment Limit) of the Original Contract is hereby amended to increase the payment limit by \$139,128.00. Paragraph 3 of the Original Contract is amended to read as follows:

“3. Payment Limit. City’s total payments to Contractor under this Contract Amendment shall not exceed \$1,477,359.00. including expenses.”

2. Section 3 of the Transit-as-a-Service (TaaS) Service order of the Agreement is hereby revised by adding the following language and attached pricing table”

“For the duration of the contract term, 1762 vehicle hours will be added at the current rate of \$78.96.”

Via TaaS Pricing Proposal for Richmond, CA

Fee per vehicle hour in line with current contract

Rate / Vehicle Hour per Current Contract(1)	\$78.96
Number of Incremental Vehicle Hours	1,762
Total	\$139,128

(1) Subject to change based on inflation if hours are used beyond time frame of current contract.

Note: Pricing excludes applicable taxes.

3. *Conflicts, Use of Terms, Governing Law. Capitalized terms used but not defined herein have the meanings set forth in the Agreement. Except as expressly provided herein, the terms and conditions of the Agreement remain unchanged. This Amendment #2 will be governed by the same law as the Agreement.*

This Amendment #2 is effective as of **March** 1, 2023

Nomad Transit, LLC

By:

Name: Alex Lavoie

Title: Manager

City of Richmond

By:

Name: Eduardo Martinez

Title: Mayor

DocuSigned by:
Eduardo Martinez
086C427628CC481...

Richmond, CA **DEPLOYMENT SERVICE ORDER**

By this service order (the “**Order**”), Nomad Transit LLC, a Delaware company with its principal office located at 10 Crosby Street, Floor 2, New York, New York 10013 (“**Via**”), and the customer identified below (“**Customer**”) agree to collaborate towards the operation by Customer of the deployment (the “**Deployment**”) in Richmond, CA

Customer Name: City of Richmond Customer Entity Type / State of Incorporation: City	Customer Notice Address: 440 Civic Center Plaza Richmond, CA 94804 Customer Email: denee.evans@ci.richmond.ca.us
Term: The duration of the Deployment shall last until the last day of the calendar month during which a period of 60 months following Launch expires, subject to extension by mutual agreement of the parties on terms to be agreed (including any increase in monthly fees for additional months).	
Services: Customer will receive access to the standard Via Solution and automatic software updates, comprised of: <ul style="list-style-type: none"> (a) Fully localized proprietary routing and matching algorithms that analyze all trip requests, assign riders dynamically to the best-suited vehicle, and group passengers headed in the same direction into efficient shared rides powered by Via’s patented technology; (b) Integrated reservation system to accept and schedule trips booked in real time, in advance, or on a recurring basis; (c) Downloadable iOS and Android rider apps that allow customers to book rides, track vehicles in real time, pay for trips, and troubleshoot any issues. The rider apps shall be dedicated to this Deployment. For the avoidance of doubt, the rider apps used in connection with the Transit- as a-Service (TAAS) SERVICE ORDER will not be utilized in connection with this Deployment ; (d) A web-based booking portal to book trips; (e) Downloadable driver app that provides efficient turn-by-turn directions; the app allows drivers to start and end driving time, schedule breaks, and contact live support; and (f) Access to the Via Operations Console (“VOC”), which allows administrators to perform a variety of functions, including booking trips, checking trip details, adjusting account information, and providing customer support, and accessing reports, as provided for in Appendix 1. (g) Access to the data reporting set out in Appendix 1, made available via the VOC. 	
Support Services – Installation. Via provides installation support for up to four weeks after the Deployment begins serving Riders, consisting of: <ul style="list-style-type: none"> (a) Localization for the Deployment Zone (defined below), including optimizing the algorithm, configuring back-end, and defining acceptable pick-up and drop off points; (b) Testing and quality assurance; (c) Helping Customer to build a launch plan and rider acquisition strategy; and (d) Instruction for drivers, dispatchers, and managers on Via’s best practices as remote launch support 	
Support Services – Ongoing. The following services are included in the fees up to the number of hours per month identified below: <ul style="list-style-type: none"> (a) Operational support and system adjustments: Includes algorithm adjustments and changes to virtual bus stops / pickup points at request of Customer: <i>up to 10 hours per month</i> (b) Expert consulting: <i>up to 5 hours per month</i> <ul style="list-style-type: none"> ● Marketing and growth: help setting up complex promotions, review and assistance for third party tools that can integrate into Via’s tech ● Operations: Including supply optimization analysis, payment & fraud investigation, and business case/unit economics analysis ● Service expansion: Including feasibility analysis for service expansions or additional projects (c) Tech Support: Dedicated Via point of contact will use commercially reasonable efforts to respond within one business day for non-critical issues (upon receipt of a detailed description of the issue as requested by Via) and to ensure that assistance is provided within a reasonable time frame. Via will also provide Customer with an appropriate channel for alerting Via to system outages or other critical issues, with respect to which Via will provide emergency assistance. <p><i>Via will notify Customer if Customer is within 1 hour of exceeding the capped hourly limit on Operational Support and System Adjustments and/or Consulting Services. If requested, hours beyond those set out above will be charged on an hourly rate.</i></p>	
<ul style="list-style-type: none"> (d) Additional Services. Via can provide optional add-on services, including consulting, fixed route referral, live agent support, multi-modal or third-party trip planner integrations, media and advertising services, marketing support, or access to our Remix® transit planning software for an additional fee. More details available upon request. 	

Customer Responsibilities.

- (a) **General.** Customer will operate and manage the Deployment as set forth in the Terms, Customer shall cooperate with Via as necessary for the purpose of setting up the Deployment and its specifications, including by providing prompt feedback to Via's inquiries and providing local insights, in order to meet mutually agreed upon deadlines.
- (b) **Launch.** Within one week of signing this Order, the Parties will mutually agree on the targeted launch date of the Deployment ("**Launch**"). Launch shall be no fewer than 12 weeks following execution of this Order. In the event that the Launch date is moved at Customer's request or delayed due to Customer's inaction, Customer will be charged a Technology Fee (as defined in Section "Fees" below) to accommodate hosting and other direct IT costs.
- (c) **Zone:** Customer and Via will agree at least three months prior to launch on the exact geographical scope for the Deployment zone ("**Deployment Zone**"). Any changes or expansions to the Deployment Zone may result in additional fees.
- (d) **Support Requests.** At the start of the project, Via will direct Customer towards the relevant CRM tools to log requests. In order to trigger a Product Maintenance request, requests for product maintenance must contain detailed information about the nature of the request. Requests for additional features may be subject to additional fees.
- (e) **Payment Processing.** The fees set forth above do not include any owed to the third-party payment processor. Via will facilitate an introduction to its recommended payment processor and Customer is responsible for entering an agreement with such payment processor in order to be able to process credit card payments.

Fees.

Customer shall pay Via the following Fees for the Term, subject always to the Minimum Monthly Fee set out below:

Fee Category	Amount	Invoicing Terms
Installation Fee	\$30,000	Payable upon signing of this Order
Monthly Fees		
Year 1 per-vehicle fees	<ul style="list-style-type: none"> For 1-3 vehicles: \$1,000 per vehicle per calendar month with a minimum of \$2,000 per month (i.e., 2-vehicle minimum) For 4-10 vehicles: \$400 per vehicle per calendar month For 11-15 vehicles: \$350 per vehicle per calendar month <p>Subject to a minimum of \$1,000 per month (i.e a 2-vehicle minimum) (the "Minimum Monthly Fee")</p>	Advance Annual Payment in accordance with paragraph 1 below
Year 2 per-vehicle fees	<ul style="list-style-type: none"> For 1-3 vehicles: \$1,050 per vehicle per calendar month with a minimum of \$2,200 per month (i.e., 2-vehicle minimum) For 4-10 vehicles: \$420 per vehicle per calendar month For 11-15 vehicles: \$370 per vehicle per calendar month 	Advance Annual Payment in accordance with paragraph 1 below
Year 3 per-vehicle fees	<ul style="list-style-type: none"> For 1-3 vehicles: \$1,105 per vehicle per calendar month with a minimum of \$2,210 per month (i.e., 2-vehicle minimum) For 4-10 vehicles: \$440 per vehicle per calendar month For 11-15 vehicles: \$390 per vehicle per calendar month 	Advance Annual Payment in accordance with paragraph 1 below

Year 4 per-vehicle fees	<ul style="list-style-type: none"> For 1-3 vehicles: \$1,160 per vehicle per calendar month with a minimum of \$2,320 per month (i.e., 2-vehicle minimum) For 4-10 vehicles: \$460 per vehicle per calendar month For 11-15 vehicles: \$410 per vehicle per calendar month 	Advance Annual Payment in accordance with paragraph 1 below
Year 5 per-vehicle fees	<ul style="list-style-type: none"> For 1-3 vehicles: \$1,220 per vehicle per calendar month with a minimum of \$2,440 per month (i.e., 2-vehicle minimum) For 4-10 vehicles: \$485 per vehicle per calendar month For 11-15 vehicles: \$430 per vehicle per calendar month 	Advance Annual Payment in accordance with paragraph 1 below
Total Minimum Amount for 60 Months	\$162,840 assuming 2 vehicles (excluding additional vehicles in excess of the minimum and any Fees for any Additional Services)	

The Customer agrees to pay the Minimum Monthly Fee (i.e., the monthly vehicle minimum fees set out in the table above) for a period of 12 months in advance and annually thereafter (the "**Advance Annual Fee**"). Via will submit an invoice for Advance Annual Fee upon signature of this Order payment due in accordance with the Terms. For the avoidance of doubt, the first Advance Annual Fee is due in advance of Launch. Via will invoice the Advance Annual Fee annually thereafter for the remainder of the Term.

In the event that the per-vehicle-fees incurred for a given month exceed the Minimum Monthly Fee, Customer shall be responsible for paying the difference for each such month ("**Monthly True-Up**") within 15 days of the date of such invoice. Via will calculate any fees due as Monthly True Up each month and provide Customer with an invoice calculating the per-vehicle fees actually incurred based on the actual number of active vehicles used during the previous month.

The Customer agrees that the sample invoice set out in Appendix 2 is satisfactory to Customer, both in substance and format.

Via shall calculate the Fees due. For the avoidance of doubt, (i) the number of vehicles per month for purposes of the above fees shall be the maximum number of distinct vehicles input by Customer that use the Via Solution on any given day over the course of the applicable calendar month and (ii) in the event the duration of the Deployment does not exactly match calendar months, monthly fees will be prorated for the first and/or last calendar months of the Deployment, as applicable, so that Customer will only be charged for the portion of such months during which the Via Solution was available to be used for the Deployment.

Customer shall reimburse all travel expenses of Via personnel for purposes of the Deployment. Installation-related services described above will initially be performed remotely, and if Via deems it necessary, in person by Via personnel for a limited period around launch. Thereafter, services will continue to be performed remotely as applicable, provided that Via personnel can be sent to Customer's location for additional trips upon reasonable request.

Twilio. Price includes our generic package for Twilio cost for 4 SMS notifications and 1.25 minutes of Twilio voice time per ride, at a maximum of \$0.05 per ride on average for all rides completed within each calendar month. Any costs associated with Twilio in excess of \$0.05 per ride will be billed to the Customer as at cost plus 10% on a monthly basis.

Launch Delay. If the Launch Date is delayed for more than a calendar month by Customer for any reason, Customer shall be responsible for paying Via for a \$1,000 monthly technology fee for the cost of maintaining the technology infrastructure for Customer's deployment during the period of delay (the "**Technology Fee**"). The Technology Fee shall be payable monthly at the beginning of the month in which it is incurred. In the event that the duration of the delay does not exactly match calendar months, the Technology Fee will be prorated for the relevant month in which Launch occurred.

Branding. The Deployment will be branded as **R-Transit** powered by Via. The "powered by Via" banner must be used only in the exact format provided by Via and will be prominent on all assets promoting the Deployment, including (but not limited to) printed collateral, digital materials, websites, and any vehicle wraps. The "powered by Via" banner will have equal prominence on all marketing materials to any additional partner logos or trademarks. Via may provide pre-approved brand assets and guidelines that must be complied with in all marketing communications distributed by the Customer.

Additional Terms.

1. Use Rights.

(a) Use Rights. Subject to the terms and conditions herein, Via will provide the Services, as defined herein. The Services will include all related services, functions or responsibilities not specifically described in this Agreement, but that are required or reasonably necessary for the proper performance of the Via Solution in connection with the Customer transportation service. Via will grant Customer subscription, access, and use rights (“Use Rights”) for the specific applications and deployment types identified in this Order.

(b) License to the Applications. In connection with the provision of the Via Solution, Via provides a limited, non-exclusive license during the Term to Customer to the applications for use with the devices for the Customer transportation service and sublicense to riders, drivers and local operators, subject to the terms set out in Via’s Privacy Policy and Terms of Use. Customer shall be solely responsible for displaying a privacy policy to riders and ensuring it contains terms that are both compliant with applicable law, and sufficient to permit Via and its agents to lawfully perform hereunder.

2. **Disclaimer.** Notwithstanding anything to the contrary express or implied in in this Agreement, Via shall have no liability to Customer or any passenger (including no duty to defend, indemnify or hold Customer harmless) for any Transport Incident where “Transport Incident” means any accident, incident or other situation involving any Passenger (including negligent, willful and/or criminal acts and omissions), Device, vehicle or equipment employed by Customer in the use, provision or servicing of the Customer Transportation Service and/or any employee or agent of Customer operating such vehicle, Device or equipment or otherwise acting on behalf of Customer (including the acts and omissions of such employees or agents while using the Application or viewing or using any device from which the Application is displayed). Transport Incidents include actual or alleged violations of Applicable Laws and the Transportation Law components thereof.
3. **Compliance with Applicable Laws.** Prior to launch of the Deployment, the parties will work together to ensure compliance with all applicable laws and regulations, including The California Consumer Privacy Act.

This Order shall be governed by the terms and conditions set forth in the City of Richmond Standard Contract signed between the parties, as of October 1, 2021 (the “Terms”). Capitalized terms used herein and not otherwise defined shall have the meaning in the Terms. By signing below, the parties agree to the Terms.

NOMAD TRANSIT LLC

By:

Name: Alex Lavoie

Title: Manager

Date: 3/1/2023

CITY OF RICHMOND

By:

Name: Eduardo Martinez

Title: Mayor

Date: 4/11/2023

DocuSigned by:

086C427628CC481...

Appendix 1 to Service Order**VOC use and Data Sharing****Authorized Users**

The below exhibit sets forth the members of the Customer’s “Core Team” of personnel who are designated authorized users of the VOC including access to the data detailed below (the “**Core Team**”). Access to the VOC is conditional upon Customer notifying Via with reasonable advance notice of the name, title, email address and any other details Via may reasonably require of the members of the Customer Core Team. The Core Team may be updated during the Term subject to Via’s consent.

Exhibit 1.

Core Team	
Title: Transportation Services Project Manager	Name: Denee Evans
	Name: Mary Cummings
	Name: Deborah Dabbs
Customer to provide details no later than one month prior to Launch	Customer to provide details no later than one month prior to Launch

Customer Core Team will be granted suitable permissions to allow them to manage and authorize access of additional Customer personnel as secondary users (“**Secondary Users**”) to the VOC. All Core Team and Secondary Users will be subject to Customer’s confidentiality and non-disclosure obligations, as described in the Terms. For the avoidance of any doubt, Customer’s Core Team responsibility includes granting permissions to Secondary Users only to the extent such permission is needed for the Customer’s operation of the Deployment and in compliance with applicable privacy legislation and removing any Secondary User access once it is no longer needed. Via retains the right to deny or revoke any Core Team or Secondary User access if Via suspects that such access may be causing or have caused a breach of the Terms, or any user guidance Via issues from time to time.

Authorized Operators

Customer may not provide access to the Via Solution to any third party except with Via’s prior written consent. In the event that Customer wishes to engage a third-party operator (“**Operator**”) to operate the Deployment, Customer shall provide Via a copy of an Operator Acknowledgement Form in the form required by Via, duly executed by such Operator, as a prerequisite for Via’s allowing the Operator access to the Via Solution. For the avoidance of doubt, no Operator will be allowed access to the Via Solution without having signed the Operator Acknowledgement Form. Customer Core Team will be responsible for grant of VOC permissions to the Operator’s team, which will be considered Secondary Users for all purposes. As between Customer and Via, Customer shall remain responsible for acts and omissions of any Operator as it relates to Operator's access to the Via Solution.

Data Sharing Plan

As part of the Deployment, and as detailed below, Via will make access to data available to members of the Customer’s Core Team, and any above-authorized Customer’s Secondary User(s) and/or Operator(s), for the purpose of research and program evaluation for the duration of the Term. The data will be accessible in the VOC and may not be shared through any other method unless otherwise authorized in writing by Via. Any and all data made available under this Order are trade secrets of Via, and subject to the confidentiality and other protective provisions set forth in the Terms at all times. Customer may not share any such data with anyone not authorized in accordance with this Appendix 1.

To protect Via’s Intellectual Property Rights and the privacy of riders, Via will provide the following data tables and dashboards in the form of aggregated reports and data tables to Customer through VOC:

- **Service KPI Dashboards:** Visualized dashboards and graphs of Key Performance Indicators. These dashboards provide a high-level view of the overall service performance across a number of metrics and periods of time. Dashboards are available for download as .jpeg files or in raw form as excel spreadsheets.
- **Data Generator:** Set of tables with granular raw data about the service that are available for download as excel or csv spreadsheets.

The reports will be refreshed daily. The reports are aggregated and any information about individual riders is de-identified. [Additional off-the-shelf reporting may be made available to Customer upon request at Via's discretion. Custom reports will need to be scoped and may come at additional cost.]

SERVICE KPI DASHBOARD	
Dashboard	Report Metrics
Service Operations Metrics & Graphs	<ul style="list-style-type: none"> ● Total ride requests ● Requests during service hours ● Met Demand ● Met Demand Rate ● Completed rides ● Completed Rides Rate ● Detailed Ride Requests Status ● Active Riders ● Driver Hours ● Utilization
Rider Experience Metrics & Graphs	<ul style="list-style-type: none"> ● Average Ride Duration ● Average Ride Rating ● Average Pickup Walking Distance (<i>corner-to-corner services only</i>) ● Aggregation Rate ● Average ETA ● Dropoff Time Requested vs. Scheduled* ● Dropoff Time Scheduled vs. Actual* ● Pickup Time Requested vs. Scheduled* ● Pickup Time Scheduled vs. Actual* <p><i>*Pre-booked rides only</i></p>
Rider Growth Metrics & Graphs	<ul style="list-style-type: none"> ● Accounts Created ● Active Riders ● Total Riders Who Requested a Ride ● Total Riders Who Completed a Ride ● Completed Rides Per Rider
Ride Rating Metrics and Graphs	<ul style="list-style-type: none"> ● Avg. Ride Rating ● Total Bookings with Ratings ● Percent Bookings with Ratings ● Total Five Star Ratings ● Percent Five Star Ratings ● Label per Rating ● Rating Distribution
Advanced Prebooking Metrics & Graphs <i>(prebooking only)</i>	<ul style="list-style-type: none"> ● Request Source ● Recurring Type ● Hours Booked in Advance ● Hours Canceled in Advance

DATA GENERATOR	
Table	Data Columns
Ride Request Table	<ul style="list-style-type: none"> ● Request Creation Date & Time ● Request ID ● Request Status ● Rider ID ● Wheelchair Accessible ● Booking Method ● Number of Passengers ● Booking type (<i>PB+OD only</i>) ● Origin Address ● Origin Lat + Long ● Destination Address ● Destination Lat + Long ● Actual Pickup Time ● Cancellation Time ● No Show Time ● Ride Price ● Ride Distance ● Ride Duration (min) ● Ride Rating
Rider Activities Table	<ul style="list-style-type: none"> ● Rider ID ● Account Creation Date ● Total Requests ● Total Completed Rides ● Total Cancellations ● Total No Shows
Drivers Table	<ul style="list-style-type: none"> ● Drive ID ● Driver Name ● Driver Email ● Active Status ● Total Shift Hours ● Avg. Shift Hours Per Day ● Avg. Shift Hours from First Assignment Per Day ● Avg. Break Hours Per Day ● Total Accepted Rides

	<ul style="list-style-type: none"> ● Avg. Rating From Riders
<p>Vehicles Table</p>	<ul style="list-style-type: none"> ● Vehicle ID ● Active Status ● Visual ID ● Short Visual Identifier ● Maker ● Color ● Vehicle Capacity ● Max Capacity ● Wheelchair Capacity
<p>NTD S-10 Report <i>Available upon request for required reporting to the FTA. (United States only)</i></p>	<ul style="list-style-type: none"> ● Service Date ● Day of the Week ● Vehicles Operated in Maximum Service (VOMS) ● Actual Vehicle Hours ● Actual Vehicle Miles ● Vehicle Revenue Hours ● Vehicle Revenue Miles ● Unlinked Passenger Trips ● Passenger Miles Traveled

Appendix 2 to the Service Order
Sample Invoice

CONFIDENTIAL



[VIA ENTITY NAME]
Via Transportation, Inc.
10 Crosby Street, Floor 2
New York NY 10013 United States

Invoice

Date
Invoice #

Terms Net 15
Due Date
PO #
Billing Period

Bill To
[Partner] [Address]

Description	Rate	Quantity	Amount
[Description of the Fee: Vehicle Fees, Ride Fees and/or Total Vehicle Hours]			Total
Tax Code Summary			

Please make checks payable to:
[]
P.O. Box 7410493
Chicago, IL 60674-0493

Wire Instructions:
Bank of America, N.A.
222 Broadway,
New York, NY 10038
Wire Routing # - 026009593
ACH Routing # - 021000322
Account # - 483065995955
Swift Code - BOFAUS3N

CCPA and CPRA Service Provider Addendum

This CCPA and CPRA Addendum (this “Addendum”), effective as of [Date], is incorporated into and forms part of City of Richmond Standard Contract signed between the parties, as of October 1, 2021, as well as all subsequent service orders, renewals, and amendments (collectively, the “Agreement”), entered into by and between City of Richmond (“Customer”) and Nomad Transit LLC (“Service Provider”).

The parties acknowledge and agree that Service Provider is a service provider for the purposes of the California Consumer Privacy Act (the “CCPA”) and California Privacy Rights Act (the “CPRA”). Service Provider certifies that it (i) understands the rules, restrictions, requirements, and definitions of the CCPA and CPRA, and (ii) understands and will comply with the restrictions set forth in the CCPA, CPRA, and this Addendum.

With respect to personal information collected and processed by Service Provider pursuant to the Agreement (the “Personal Information”), Service Provider shall not:

- (a) Sell the Personal Information;
- (b) Share the Personal Information for cross-context behavioral advertising purposes;
- (c) Retain, use, or disclose the Personal Information, except as necessary for the specific business purposes listed in (i) to (vi) below or any other business purposes specified in the Parties’ Agreement or as otherwise permitted by the CCPA or CPRA:
 - i.* Performing the services described in the Agreement, which include but are not limited to the maintenance and servicing of user accounts, provision of customer service and support, processing of transactions and payments, verification of user information, provision of analytics services, data storage, training, and the fulfillment of similar services on behalf of the Customer;
 - ii.* Ensuring security and integrity of services, including but not limited to debugging and otherwise repairing the services to restore intended service functionality;
 - iii.* Undertaking internal research for technological development and demonstration;
 - iv.* Undertaking activities to improve, upgrade, or enhance the services;
 - v.* Short-term transient uses, provided that personal information is not disclosed to third parties (i.e., parties that are not themselves service providers or contractors) and is not used to build a consumer’s profile or otherwise alter the consumer’s experience outside their current interactions with the business; and
 - vi.* Advertising and marketing services, including the auditing of such services, as authorized or directed by the Customer, and as permitted under the CCPA or CPRA.
- (d) Engage in any activity prohibited by any other provision of the CCPA and CPRA currently in effect.

Service Provider claims no ownership or other proprietary rights in any of the Personal Information. Customer grants Service Provider the right to access, modify, and use the Customer Data for the purpose of performing Service Provider’s obligations under the Agreement, including to provide the Services and incidental to providing the Services, to improve the

Services, and to create derivative works, including aggregate consumer information and deidentified data, to the extent such uses are permitted by the CCPA and CPRA.

Service Provider shall notify Customer if it determines that it can no longer meet its obligations under the CCPA or CPRA. Customer has the right, upon notice of at least sixty (60) days, to take reasonable and appropriate steps to stop and remediate any unauthorized use of Personal Information.

For purposes of this Addendum, the terms “personal information,” “service provider,” “third party,” “contractor,” “business purpose,” “commercial purpose,” “cross-context behavioral advertising,” “deidentified,” “sell,” and “share” are as defined in the CCPA and CPRA. “CCPA” and “CPRA” refer to both the statutes and any implementing regulations that are in effect. Capitalized terms used but not defined herein shall have the meanings set forth in the Agreement. In the event of any inconsistency between the provisions of this Addendum and the Agreement, the provisions of this Addendum shall control.

NOMAD TRANSIT LLC

CITY OF RICHMOND

By: _____
Name: _____
 Alex Lavoie
Title: _____
 Manager
Date: _____
 3/1/2023

By: 
 086C427628CC481...
Name: _____
 Eduardo Martinez
Title: _____
 Mayor
Date: _____
 4/11/2023

Date:

Date:

Contract Amendment between the City of Richmond and
NOMAD TRANSIT, LLC

Amendment No.

P.O./Contract No.

2

5755

AMENDMENT PROVISIONS (AMENDMENT HISTORY)

The **first** Contract Amendment was approved by City Council of the City of Richmond or executed by the City Manager on May 7, 2022 for one or more of the following provisions (check those that apply):

- Increased contract payment limit by \$ 338,231.00 for a payment limit not to exceed \$ 1,338,231.00.
- Term Amendment (insert new termination date): _____
- Service Plan

The **second** Contract Amendment was approved by City Council of the City of Richmond or executed by the City Manager on Decemeber 6, 2022 for one or more of the following provisions (check those that apply):

- Increased contract payment limit by \$ 312,500.00 for a payment limit not to exceed \$ 1,650,731.00.
- Term Amendment (insert new termination date): _____
- Service Plan

The **third** Contract Amendment was approved by City Council of the City of Richmond or executed by the City Manager on _____ for one or more of the following provisions (check those that apply):

- Increased contract payment limit by \$ _____ for a payment limit not to exceed \$ 1,650,731.00.
- Term Amendment (insert new termination date): _____
- Service Plan

The **fourth** Contract Amendment was approved by City Council of the City of Richmond or executed by the City Manager on _____ for one or more of the following provisions (check those that apply):

- Increased contract payment limit by \$ _____ for a payment limit not to exceed \$ 1,650,731.00.
- Term Amendment (insert new termination date): _____
- Service Plan

The **fifth** Contract Amendment was approved by City Council of the City of Richmond or executed by the City Manager on _____ for one or more of the following provisions (check those that apply):

- Increased contract payment limit by \$ _____ for a payment limit not to exceed \$ 1,650,731.00.
- Term Amendment (insert new termination date): _____
- Service Plan



May 9, 2024

Contra Costa Transportation Authority
2999 Oak Road, Suite 100
Walnut Creek, CA 94597

Re: City of Richmond Draft Responses to Contra Costa Transportation Authority (CCTA) Measure J15 Audit (May 2024)

To CCTA Staff:

On May 7, 2024, the City of Richmond received a Draft Measure J 15 Audit regarding the City of Richmond's Paratransit Program. City staff responses to the issues identified in the audit and recommendations were due on May 9, 2024. For ease of reading, City staff created a matrix to combine the language from the audit (identified issues and recommendations) with responses from the City. Given the time constraints to review the audit and provide responses, the attached represents a draft and the City reserves the right to update its responses after further review of the audit.

As we continue to provide services to the community, here are a few things we are excited about:

- **Vehicles:** Recently received two (2) new R-Transit vehicles that are electric and have more space to allow for more passengers. The City Council authorized use of ECIA funds for the purchase of the vehicles since we are operating R-Transit at a deficit and Measure J were unavailable. If this wasn't the case, the City should have had sufficient Measure J funds available in the fund balance to purchase new vehicles.
- **Software:** Authorized the purchase of new tablets to enable the download of new route management software. This new software will allow us to collect and disseminate better information for reporting purposes. Our previous software was unable to collect the type of data often requested by PCC and CCTA, and via claim forms. We are also working with LYFT to see if we can collect the information requested.
- **Outreach:** Created new R-Transit outreach materials, attended more community events (including the El Sobrante stroll event and passed out dozens of flyers to residents informing them of R-Transit/LYFT services in their community), and hired a consultant to help do community outreach in Richmond and unincorporated areas. We are open to attend meetings, events, etc. within Richmond or unincorporated areas. Please invite us and help us share information!!

- Finances: Staff continues the monthly review of R-Transit's budget. The City's Deputy City Manager, Nickie Mastay, and Community Services Department Finance Manager, Hope Lattell, both copied on this email, are involved in the review of claim forms (narrative and budget) prior to submission. Including myself, Nickie and Hope, are not paid through Measure J funds but we are engaged to ensure there is extra review of R-Transit related documents.
- Other Transit Options: Richmond is a multi-modal city with resident access to BART, AC Transit, Ferry and Amtrak. In addition, the City provides Richmond MOVES, an on-demand shuttle, which will soon cover all of Richmond, only costs \$2/ride, and is free for students and seniors. This service is primarily grant-funded, and is therefore, cost efficient for ambulatory seniors and community members. This program has been operational since 2022 and we have seen steady increases in use by residents. This program, along with others such as bike and car share programs, offer other mobility options to R-Transit and other users.

Thank you for the opportunity to respond to this very important issue. The City of Richmond cares deeply Please contact me at 510-620-6828 or at lashonda_white@ci.richmond.ca.us if you have any additional questions.

Respectfully,

LaShonda White

LaShonda White
Deputy City Manager

DRAFT City of Richmond Responses to the Paratransit Audit

(Audit Received: May 7, 2024 and Draft Responses Provided: May 9, 2024)

Issue as Identified by Auditor	Auditor Recommendation	City Response
<p>#1: Errors, inconsistencies, and contradictions in Claims Forms. A simple review of the FY23/24 Claim submitted by the City revealed a list of issues, some of which were highlighted by the PCC. Issues in that FY23/24 Claim include:</p> <ul style="list-style-type: none"> • The titled service area map inserted in two locations of the Project Description Narrative is not a map of the service area, but instead, a map of the city block of the Civic Center in Richmond. This is a simple error to spot and should have been corrected before submittal. • The narrative cites '1,770 active clients presently registered in the database'. Table C lists FY22/23 Projected at 3,720 registered clients. Administrative staff explained on the Working Group Call that 1,770 was the more recent and accurate number, but there was no further explanation for the discrepancy. • Table C asks for an average passenger trip distance. The City instead lists a range of 3-6 miles. As noted in the Claim Form, the average should be calculated as Revenue Miles divided by passenger trips. Using the YTD FY22/23 Revenue Miles total from the attached Vehicle Productivity by Mileage report would put the average trip distance at 438 miles which is clearly incorrect, and nowhere near the 3-6 mile range cited. It is unclear how the City generated the range reported in the Claim. • Van vehicle mileage (odometer) reported on Table D doesn't match end odometer numbers on attached Vehicle Productivity by Mileage reports. • Table A Fare Revenues for FY21/22 Actual were \$92,001, but Projected FY22/23 revenues were \$20,000. Staff could not explain the unusually high fare revenue for the reported 2,787 passenger trips (\$33 per ride), or why the figure was lowered so significantly for the next year's projections. • The figure listed as Paratransit Fare Subsidy on Table A is, in fact, a Taxi/TNC subsidy. • The Table C-provided definition of Revenue Service Hours, and the industry standard, is 'Total Hours that a vehicle is available to pick up passengers'. The City Claim cites a 7.5-hour service day (9am – 4:30pm) and offers service approximately 250 days per year. For single-van service, the annual hours would be 1,875. Table C reports 1,200 Projected FY22/23 Revenue Service Hours for both vans. • At the cited FY22/23 Projected Passenger Trips per Revenue Service Hour of 430 and Projected Revenue Service Hours of 1,200, the City would carry 516,000 passengers. The Claim cites 2,900 projected passenger trips. Conversely, if the projected passenger trips of 2,900 were divided by the Projected Passenger Trips per Revenue Service Hours of 430, the City would have offered just 6.7 hours of service for the year. The 430 figure is an obvious error and the disparity in total passengers that figure reflects should have been easily spotted and corrected before the Claim was submitted. • Table C includes 'Fare Subsidy: Number of Tickets Sold' for the three reported years. City staff could not provide an explanation for the figures or what they represented during the Working Group Call. City Finance staff cited that the figures were a mistake and should not be there. • The Vehicle Productivity by Mileage Reports attached with the Claim showed three occasions when impossible mileage was reported to a van. These were 18,936 miles, 595,039 miles, and 650,053 miles travelled, each by a single van in a single day. The total was 1,272,448 miles for the two vans YTD, which is clearly not possible. Based on daily odometer reads in the reports, the correct total is 8,551 miles. An obvious error such as this should have been spotted and corrected before the Claim was submitted. 	<p>The fact that many of the contradictions and errors in the FY23/24 Claims Form were easy to spot, and that even after being called out, weren't corrected in subsequent submissions, indicates a lack of oversight, understanding of system metrics, and QA review. City staff either don't have the experience or understanding of their program to accurately report on it or they are not applying their experience to this process. As the source of revenue for their program, the City must prioritize Claim submittals. It may be necessary to engage new staff, or a third-party contractor, experienced in service delivery and program metrics, to manage the Claims process.</p>	<p>City Response:</p> <ul style="list-style-type: none"> • The service area map is posted on the City's website under Transportation services and has been posted for 20+ years. The Service Area map has also been submitted and received in all previous claim forms and not never changed. • We number of registered clients provided was accurate based on our count and the system database RouteMatch. Projections to register 3,720 additional clients was based on doubling the amount of active clients given our contract with LYFT Inc to offer 24/7 service. • Table C information provided was what the software "RouteMatch" provided. We rely on the software and have used it for over 20 years and have use the same software to complete and submit previous claim forms that were accepted and approved. We have corrected this by getting a new software to calculate these fields and other fields of information. • The Routematch software calculates this information • The low fare revenue projected in FY 22/23 (\$20k) was on the delay of receiving Measure J revenue to effectively operate. • "The figure listed as Paratransit Fare Subsidy on Table A is, in fact, a Taxi/TNC subsidy" That is correct this is the column we have always used to report this information on all previous and current claim forms we have submitted. • "The Table C-provided definition of Revenue Service Hours, and the industry standard, is 'Total Hours that a vehicle is available to pick up passengers'. The City Claim cites a 7.5-hour service day (9am – 4:30pm) and offers service approximately 250 days per year. For single-van service, the annual hours would be 1,875. Table C reports 1,200 Projected FY22/23 Revenue Service Hours for both vans." <p>This information is correct given that we only have 1.5 drivers. We were not able to mee single-van service use. Shared rides are not reported through LYFT to meet this projection. Also, the City's projections were based on receiving Measure J funds to support the service financially.</p>

<ul style="list-style-type: none"> • Additionally, the same reports showed one van operating 51 days YTD and the other 154 days with just 12 days overlapping. The staff chart in the narrative showed 2 full-time drivers, but two drivers would only have been needed on 12 days. • The Project Description Narrative cites that “All Measure J Program 15 funds were expended in the past 3 years (2019-2022)”, but Table A shows a FY21/22 Actual ending reserve balance of \$103,759. 		
<p>Identified Issue #2: Failure to File Claims or Make Corrections. While citing a lack of resources as a reason for their limited promotion or limited services, the City has missed years of filing a Claim, has not submitted Claims in a timely manner, or has submitted Claims with data that the PCC has noted as inconsistent or incomplete, requiring resubmittal.</p>	<p>Recommendation: The City must prioritize filing a Claim every year and addressing all issues noted in the Claims expeditiously.</p>	<p>City Response: The City understands the importance of filling claims annually and completely. Additional City staff are now participating in and learning more about the claim form and services. In addition, the City is switching to a new scheduling platform that should drastically assist with accurate information gathering and support completing the forms. As of May 9, 2024, the City has submitted the outstanding claim forms or requested information for FY 21/22 and FY 22/23.</p>
<p>Identified Issue #3: Non-Compliance with Coop Agreement. While neither the Coop Agreement nor cited Measure J Expenditure and Strategic Plans address level of service, service quality, or performance expectations for MJ15 funded programs, the PCC, per their bylaws, has the duty to ‘Review annual claims for Measure C and Measure J funds, applications ... and make recommendations regarding these claims and applications as appropriate.’ The PCC has made a recommendation for this audit based on the contents of Claims Forms and in response to questions about service quality and performance. Their request for an audit is their authority to question the City’s compliance with the Coop Agreement.</p>	<p>Recommendation: CCTA’s Coop Agreement with MJ15 fund recipients should include language that addresses minimum standards of service and performance expectations or should expressly cite the PCC’s duty to determine if the transit entity is meeting performance expectations, and thereby the agreement. The consequences for failing to meet performance expectations should also be addressed.</p>	<p>City Response: City staff agree with this recommendation and would appreciate guidance and clear language regarding minimum standards of service and performance expectations.</p>
<p>Identified Issue #4: Unmet Needs – The only record of Table E Unmet Needs reported in the FY23/24 Claim was for “Patrons outside your service area requesting rides”. City staff identified this as callers who ask about service who do not reside in the service area. They also cite not keeping a log of calls received. It is unclear how this Unmet Need is being recorded, if not through a call log. Other Table E categories not completed by the City include “Patrons inside your service area requesting rides outside of your service area” and “Number of same-day ride denials due to capacity.” No numbers were added for these categories, though it seems likely that there are instances of these occurrences and the City notes in their narrative that ‘...same-day service is limited due to high demand if a same day appointment is scheduled.’</p>	<p>Recommendation: The City should keep a log of all customer calls. That log can include checkboxes for each of the categories of Unmet Needs identified in the Claims Form. That information could prove valuable in assessing program needs and future changes or expansion.</p>	<p>City Response: City staff agree that keeping a log of customer calls, outside of those already captured in the scheduling system, would provide information helpful in completing the Claim Form and addressing community needs. City staff plan to discuss this recommendation and as appropriate, will incorporate this into the proposed Richmond Paratransit Standard Operating Procedure (SOP).</p>
<p>Identified Issue #5: Lack of Budget Detail for Review. A Claim was filed by the City and accepted by CCTA for FY19/20. For FY20/21 and FY21/22, the Claim submittal process was suspended, or only a brief narrative was requested due to Covid. The City failed to submit a Claim for FY22/23, though they provided a Claim Form for that year to the Audit Team. The provided form is not complete and shows no program costs. A Claim was filed by the City for FY23/24 which includes program costs. The only complete Budget Detail to Claim comparison for reported Actuals is for FY21/22.</p> <p>The City provided the full five years of program budgets, but invoices, expense reports, and receipts would all be required to do a full fiscal audit of program expenses. There is not sufficient back-up documentation to confirm what was spent and that direct costs cited were spent on the program. Additionally, because only two complete Claims were submitted for the five fiscal years of review, and they represent the first and last years, there is no way to track the flow of the expenditures to budget or to follow reserve balance.</p>	<p>Recommendation: Future years’ Claims must be complete so that true program costs can be understood, to allow for a rolling assessment of expenditures and reserves, and so CCTA can follow Claims against budget if needed.</p>	<p>City Response: City staff agree with this recommendation and will adhere to future Measure J Claim Form deadlines. City staff are hopeful that the new scheduling software, additional training and understanding of the Claim Forms, and the addition of the Community Services Department Finance Manager to the team, will assist City staff in completing the forms. As of May 9, 2024, the City has submitted the outstanding claim forms or requested information for FY 21/22 and FY 22/23.</p> <p>The City provided the full five years of program budgets, per the request of the Auditor. Since this audit was not a full fiscal audit, City staff did not recall a request from the Auditor for “invoices, expense reports, and receipts.” The City has various financial checks and balances in place and information is</p>

		collected and retained in our financial management system, MUNIS. The majority of costs are for salaries and benefits, cost pool allocations, and a contract with LYFT. If requested, City staff have access to all required back-up information to substantiate ALL paratransit-related costs.
<p>Identified Issue #6: Limited Detail Available Shows Inconsistencies. The two Claims years with program cost detail noted above do not match the budget detail provided by the City for the same year. While not all totals represent actuals, they are inconsistent enough to point them out.</p> <ul style="list-style-type: none"> • The FY19/20 Claim provided by the City to the Audit Team was not complete, but the CCTA approved version dated May 8, 2019 put the <i>Estimated</i> program year expenditures at \$1,110,000 while the same budget year detail showed an <i>Actual</i> program cost of \$687,134.26. The difference could reflect the first four months of the Covid pandemic that closed out the fiscal year. • The FY23/24 Claim put FY21/22 <i>Actual</i> expenditures at \$959,525.00 but the same budget year detail showed <i>Actual</i> program expenditures of \$813,881.05. • For FY22/23 the <i>Projected</i> program cost cited in the FY23/24 Claim was \$960,405.00 while the budget <i>Actual</i> put it at \$854,769.37. <p>And, as cited earlier, the FY23/24 Project Description Narrative cites that “All Measure J Program 15 funds were expended in the past 3</p>	<p>Recommendation: Future years’ Claims must be complete so that true program costs can be understood, to allow for a rolling assessment of expenditures and reserves, and so CCTA can follow Claims against budget if needed.</p>	<p>City Response: City staff agrees with the recommendation and will complete future years’ Claim Forms as required.</p>
<p>Identified Issue #7: Cost Pool Indirect Costs Burden the Program. The City is charging an administrative and liability expense to the program as part of a Cost Pool distribution. The Cost Pool memos provided by the City as Attachment 5 indicate that the City has earmarked a much higher total Cost Pool expense to the program than they are charging against it. For FY22/23 the City consultant calculated an Indirect Administrative Charges Cost Pool expense to the “1003 Transportation Operation”, which includes only the Paratransit/Lyft services, of \$744,016, but charged \$220,202 to the service. They consider the \$523,814 difference a subsidy to the program. An additional \$41,058 was charged to the program for General Liability Cost Pool in the same fiscal year. If charged at the fully calculated administrative rate, the City would be burdening the program with a total of \$785,074 in indirect costs – 82% of the total Projected program expenditures for that year. It is unfathomable that the City’s calculations would result in that percentage of a program’s funding to an expense that does not directly deliver service or impact customers. The fact that the City lowered that value to 27% of projected program expenditures is a reasonable course of action, but the percentage burden against a program that provides services to a vulnerable population is still too high.</p>	<p>Recommendation: The City’s Paratransit program should request an exemption from City Cost Pool expenses or CCTA should set a limit on the percentage of indirect costs that can be charged against a MJ15 funded project.</p>	<p>City Response: All City of Richmond departments have Cost Pool expenses allocated to their budgets. It is how the City of Richmond operates and represents the true cost of operating a department. The City’s Cost Allocation Plan is developed by an external consultant.</p> <p>An exemption from City Cost Pool expenses would require Richmond City Council approval and would essentially be a subsidy from the General Fund.</p> <p>The City will wait for direction from CCTA if a limit is set on indirect costs that can be charged against a MJ15 funded project.</p>
<p>Identified Issue #8: Imbalance in administration costs to operations costs. It is not clear from the Claim Form or the City-provided budget detail how they assign program costs to the Operations and General Administration categories in Table A of the Claims Form. The ratio they show is high, however, compared to the other West County services. For FY21/22 Actuals the General Administration Expenditure was \$465,066 and Paratransit Operations Expenditures plus the TNC Fare Subsidy cost was \$494,459, putting admin at 48% and operations at 52% of the total program cost. Comparatively, the City of El Cerrito Paratransit was 21% to General Administration and the City of San Pablo shows 9% to General Administration.</p>	<p>Recommendation: As already noted, the Cost Pool indirect cost is putting a burden on the program and should be eliminated or limited to free up funds for the direct delivery of service. Assuming the Cost Pool expense is included in the General Administration Expenditure, pulling it from the program total and administrative expenditures would result in Administration Expenditures of 30% of the total program cost.</p>	<p>City Response: Without direction from CCTA regarding the City’s Cost Pool or limits to indirect costs, the City automatically allocates cost pool charges to the paratransit program, as it does to other departments. The City will wait for direction from CCTA if a limit is set on indirect costs that can be charged against a MJ15 funded project.</p>
<p>Identified Issue #9: No cost allocation by program. City budget does not breakdown costs by the R-Transit and Lyft programs. The Lyft program subsidy has been confirmed by City staff as the Professional Services</p>	<p>Recommendation: To understand the true costs of the two programs and assess if contracted services are providing an overall lower cost ride,</p>	<p>City Response:</p>

<p>line item in their budget, and easy to pull out. Other items such as Paratransit Scrip Books (Fare Revenue), payroll and benefits for drivers, and operator uniform costs can also be pulled into the Paratransit side, but other budget line items cannot easily be allocated to the two programs.</p>	<p>the two programs should be assigned percentages of shared costs to determine an estimated program allocation for future year Claims.</p>	<p>City paratransit staff will need to discuss this identified issue with the City Finance Department to understand if this recommendation is feasible.</p> <p>It is City paratransit staff's understanding that cost pool charges are based on general liability, workers compensation, administrative charges/indirect charges, and rent. This cost would not be applicable to the LYFT program.</p>
<p>Identified Issue #10: Balance of payroll to benefits. Per City response to cite their average ratio of benefits to payroll, they cited a City standard calculation of 85% of salary costs for benefits. For the five fiscal years of audit review, the Paratransit program benefits were higher than the City average, ranging from 92% for FY23/24 YTD, to a high of 118% for FY20/21.</p>	<p>Recommendation: It is unclear why the benefits to salary ratio is higher for this program unless the longevity of staff – some noted being with the program for 25 years – is impacting costs with legacy or length-of-service benefits. The City should assess the issue to understand and validate the higher benefits cost ratio.</p>	<p>City Response: City's average benefits rate is approximately 85%, however, individual staff benefits rate depends on several factors and can be above or below the City's average. Healthcare cost depends on an employee's individual enrollments, retirement rates depend on the employee CalPERS plan status i.e. Classic Plan vs. PEPPRA Plan. CalPERS Unfunded Actuarial Liability cost depends on the latest valuation report issued by CalPERS and is a fixed amount that the City is obligated to pay. The UAL is charged to the City departments as fixed charge per the number of employees. Removing the healthcare cost and UAL cost from the benefits, Transportation division benefits rate ranges from 33% to 42% for the years from 2021 through 2024.</p>
<p>Identified Issue #11: Cost per Passenger. The cost per passenger is high and is out of line with other, similar programs. The FY21/22 actual program cost was \$813,881.05 per the provided City budget detail. The FY23/24 Claim Form showed Actual FY21/22 passenger trips of 2,787 for a cost per passenger of \$292.03. By comparison, the City of El Cerrito Paratransit had a \$100 cost per passenger from expected revenue and the City of San Pablo's cost per passenger was \$83 for the same fiscal year. County Connection's National Transit Database records for 2022 show a \$79 cost per Paratransit rider.</p>	<p>Recommendation: Again, the Cost Pool expense, as well as the higher-than-average benefits costs, are impacting overall program cost and the cost per passenger. However, removal of Cost Pool costs would only lower the FY21/22 cost per passenger to \$202.75, still well above the other services. The City must work from both sides to reduce the cost per passenger by lowering costs and increasing riders.</p>	<p>City Response: Please see responses to Identified Issues #7-10 regarding potential removal of cost pool expenses.</p> <p>City staff will continue to examine the program and look at ways to be more efficient and effective.</p>
<p>Identified Issue #12: Lack of understanding of program metrics. City staff has relied on reporting from Route Match, but that information is inconsistent from report to report and staff is not always clear on what the information represents. Lack of understanding of metrics means staff have no way to recognize errors in them, so they are reporting out with errors and inconsistencies. This was clear on the Working Group Call. Staff could not agree on the definition or reporting of a trip, how fare revenue was defined across documentation, the existence of a mandatory \$2.50 annual client ID or how those funds were being accounted for, or how the % on-time performance was calculated, among other things.</p> <p>The City provided six unique Route Match reports in response to the audit data request. Those reports were scattered over the five fiscal years requested, with no complete set of reports for any one year. The City was emailed a table of missing reports and asked to send the documentation, then reminded on the Working Group Call to supply at least one full fiscal year of reports by the extended April 16 deadline. No additional reports were received. The most complete reporting year is FY21/22. See table below for an example of inconsistencies in the reporting provided by the City for that fiscal year. Only 'Guests', 'No Shows', and 'Cancels' match from across the five Route Match reports provided. Figures for all other metrics were different for each report provided for the same fiscal year.</p>	<p>Recommendation: Manual keying of handwritten manifest times and numbers is likely contributing to the errors seen on the Claims Forms, as well as inconsistencies in Route Match reports. Without a QA review by staff who understand the metrics being reported, errors will persist. City staff need to work with Via to ensure that the system is set up in a way that lets them take the best advantage of any automated data logging. City staff also need training specific to the provision of paratransit services to understand performance metrics and standards of service, or a new staff person needs to be pulled into the program to provide the needed experience. Alternatively, service delivery could be contracted to an experienced vendor.</p>	<p>City Response: City staff agree that manual entry of information is not effective and look forward to the full implementation of the new Via system. In addition, staff agrees that additional training and the creation of SOPs will help staff better understand program procedures and metrics.</p>
<p>Identified Issue #13:</p>	<p>Recommendation:</p>	<p>City Response:</p>

<p>Lack of oversight and review of program reports. As the table above demonstrates, City staff are pulling Route Match reports with clear inconsistencies in metrics for the same time period. The FY23/24 Claims Form review demonstrates similar inconsistencies in reporting within the Claim and to supporting Route Match documentation. If someone is reviewing these documents, they are missing the obvious or they see the issues but are not correcting them before CCTA review. Administrative staff are not being held by management to a standard of report reviews, reconciliation, or quality, and thus a standard of service review and quality.</p>	<p>City staff either need training specific to the provision of paratransit services to understand performance metrics and standards of service, or a new staff person or third-party contractor needs to be pulled into the program to provide the needed experience. An ongoing internal audit of various reports should be done, and a QA review of all supporting reports and documentation used for Claims Forms reporting must be completed before Claims submittal to CCTA.</p>	<p>City staff understand the concerns and agree that analysis of metrics and reports is necessary. Additional training of existing staff, bringing on experienced staff, and/or the creation of SOPs will assist with QA, program delivery, and accurate submission of Claim Forms.</p>
<p>Identified Issue #14: Metrix requested in Claim submittal. The definitions of some metrics in the Claims Form confused City staff. For example:</p> <ul style="list-style-type: none"> • In the Claims Form, 'Total Passenger Trips' was defined as the '...movement of a person on a vehicle...', but per City staff, Route Match reports a single vehicle movement as one trip, regardless of the number of passengers on board. In the Claims Form, this is intended to be total passenger boardings, but staff were confused by the contradiction with internal reports using the word 'trip.' • Average Trip Distance is requested but the total Revenue Miles is not part of the reporting, so there is no easy way for reviewers to validate the response given. • There is no call-out for the unique service passenger totals, service hours, or miles. Reporting from the Lyft program does not include actual trip miles or duration, but claimants could be using the combined service total passenger number from the Claim Form to calculate metrics when the other side of the data set is not a factor (i.e. calculating total of passengers from multiple different services against Revenue Miles for just one service program). <p>Additionally, data that could prove helpful in assessing successful programs and those in need of assistance, is not being requested.</p>	<p>Recommendation: The Audit Team provided recommended revisions to the Claims Form tables and Project Description Narrative to CCTA. The revisions should clear up data requests by claimants and help the PCC and CCTA more easily see highlights and deficiencies in funded programs.</p>	<p>City Response: City staff welcome any updates/revisions to the Claim Form that can assist with the process.</p>
<p>Identified Issue #15: Low Ridership. Program ridership reported in Claims and cited in Route Match reports is low for the cost of the program and potential client pool. While data on total boardings is inconsistent across reports, a total ridership for both the Paratransit and Lyft program in the range of 2,800-3,000/year is a fair assessment. In FY23/24 projections for El Sobrante Paratransit ridership were 2,080 and for San Pablo, 4,200. Both serve smaller geographic areas, have shorter service hours, and receive substantially less MJ15 funding.</p>	<p>Recommendation: The current state of the program, with the number and condition of operating vehicles and 1.5 drivers, limits the City's ability to carry more Paratransit riders with City resources. The provided manifests show multiple driver breaks and gaps between pick-ups for the primary van and driver where additional trips could be operated, but demand may not be there to fill those spots. The City is also contracting TransMETRO which would also increase their capacity, but again, demand may not be there. To increase demand, the City needs to commit to promoting its service and implementing a service plan to add drivers and vehicles, or contract more trips to TransMETRO. Additionally, the City needs to more precisely define and confirm Unmet Needs. The limited Lyft program data received shows an average trip subsidy cost to the City of \$8.73. Staff time dedicated to assisting Lyft riders appears to be minimal. This program has the greatest potential with unlimited capacity, to increase ridership at the lowest cost. Robust promotion of this service could have an immediate impact on increasing overall program ridership.</p>	<p>City Response: The current number of paratransit staff, including drivers, the cost of the LYFT contract, cost pool allocation, and other operating cost, are aligned with proposed revenue. When paratransit had additional drivers, the General Fund subsidized the program annually which led to a deficit over \$1 million. The city has detailed information that is available from Lyft for all years audited. Unfortunately, it appears that this information was not fully provided to the auditor. As part of the outstanding FY 22-23 claim form that was recently submitted, city staff provided detailed Lyft information regarding number of rides, zip code for pick up, and average miles. Staff agrees that additional promotion of the paratransit and Lyft programs is needed. Staff has recently received support from an intern to develop new outreach materials. Staff is also bringing those materials to various City of Richmond events for distribution and have created a draft outreach plan to help continue to spread the word about these programs.</p>
<p>Identified Issue #16: Vehicles. The two current 2011 vans are in poor condition. One stopped operating properly during a client pick-up on the day of the Site Visit and was towed. The demonstrated need to force the</p>	<p>Recommendation: To avoid cancellations or limiting trip scheduling, the City must prioritize issues that are preventing the new vans from being</p>	<p>City Response: The city has two new vans that will be put into rotation and utilized for providing paratransit services in the near future. The</p>

<p>door closed on the day of the ride-along is a safety concern. If the door is not stable, it could open mid-trip. The City has recognized the age and condition of the vehicles and purchased two new all-electric vans as replacements. However, per City staff at the Site Visit, and evidenced by the fact that the service is still being operated with the two older vans, the new vans are not being used. Staff cited that they couldn't be charged. It is unknown what the exact issue is regarding charging of the vehicles. Staff also cited that the new electric vans weren't appropriately outfitted to board passengers at the side door because the step is too high and there are no handrails for support.</p>	<p>put into service. An examination of the maintenance program is also warranted to understand who is responsible for maintenance, the inspection and service maintenance regimen, and maintenance standards. If not done recently, the fleet should be inspected with respect to current condition and useful life.</p>	<p>current vehicles, as well as the new vehicles, are serviced by our public works fleet division. Based on conversations with experienced city mechanics, a determination will be made if city vans will receive maintenance internally or externally.</p>
<p>Identified Issue #17: Drivers. While the City's Paratransit drivers are both full-time employees, one drives only part-time due to a cited disability accommodation. They spend the remainder of their full-time hours assisting with dispatch functions and office duties. Vehicle logs for FY23/24 showed only 12 days YTD that both vans operated, so the part-time driver is not driving often. City staff also stated that they manually adjust daily ride scheduling to avoid including a wheelchair passenger on their manifest on the days they do drive.</p> <p>Whether the limitation of 1.5 drivers is impacting ridership, or the daily ridership needs don't necessitate two full-time drivers is unclear.</p>	<p>Recommendation: If they have not done so, the City should assess the fitness of its existing drivers to perform the duties of the job. Per the Audit Team Paratransit Consultant, paratransit drivers are typically expected to be able to lift 40 lbs. to be considered fit for duty. If it is not already, this qualification should be included in the job description and verified in the hiring process for any future drivers. The City should also assess if the dispatch and administrative needs require the extra time that the 2nd full-time driver is dedicating to them. At a minimum, the City should report on Claims Form the staffing that represents the day-to-day contribution of employees to the operation, rather than their official classification.</p>	<p>City Response: City staff will review the identified issues and recommendations with our human resources department.</p>
<p>Identified Issue #18: Rider ID Card. The Client Guide and City staff indicate that an Identification Card is required for all qualifying clients. City administrative staff on the Working Group Call were not in agreement over the need to renew the card annually and Finance staff were not aware that a card was required or that \$2.50 is charged per card. Nobody was aware of how the revenue for the cards was being reported. They did agree, however, that the card is not, in fact, required at the time of a trip or to purchase ride coupons, in contradiction to print materials. Instead, it appeared to be a way to requalify passengers as eligible for service based on their address.</p>	<p>Recommendation: As the card appears to have no use to clients, and the revenue is not accounted for, the City should reconsider the need for the card. As an extra step to receive services with a \$2.50 fee, it is a barrier to onboarding new clients. If the card is being used only for requalifying clients based on address, the City should develop a simple, annual address verification process for clients.</p>	<p>City Response: City staff agrees with his recommendation and will discuss the usefulness of this card and other verification processes.</p>
<p>Identified Issue #19: Clients in Unincorporated Areas. The MJ15 Claims Form requests detail on registered clients in unincorporated areas. City staff cited that that data must be manually culled from Route Match and that the effort is labor intensive. The two March manifests provided by the City included pick-ups and drops-offs at home addresses in unincorporated areas, so it is clear that a level of service is being provided. While there is no documentation to support the FY21/22 entry of 416 clients in unincorporated areas, the provided manifests support that they have clients registered outside of city limits.</p> <p>While City staff indicated that Via will allow for this reporting, the Via contract provided by the City as Attachment 6 defines the data sets it provides, and there is no indication that it will provide that client detail.</p>	<p>Recommendation: If Via does not, in fact, include that information, the City should inquire if a field can be added in the client database to indicate if the client's home address is in an unincorporated area. A simple Google map search of the address would show the administrative support staff if they should note an unincorporated address in that new field. Once the manual work is done to assess its existing client database, doing that search for each new client would take just a few minutes.</p>	<p>City Response: City staff understands the request for information regarding the number of register clients and pick up and drop offs within the unincorporated areas. City staff is able to more easily determine this information for lift trips and has done so for FY 21/22 and FY 22/23. Staff continue to work to analyze the data for other years. In addition, City staff has already worked with via to provide city and county maps showing the incorporated areas so that the new scheduling software can easily collect and report this information.</p>
<p>Identified Issue #20: Fare Revenue. Fares of \$4/\$5 are in line with other Paratransit services in the area and higher than the average fare paid by a Lyft service rider. Per City staff, Fare Revenue is reported in Claim Forms as the value of ticket books sold, not the value of tickets collected from riders for the reported fiscal year. Other reporting for 'Fare Revenue' or 'Revenue' appears to be for the tickets collected, but staff could not confirm that on the Working Group Call. They were unaware that Fare Revenue was appearing in</p>	<p>Recommendation: The City needs to have a clear understanding of how Fare Revenue is defined for both the budget and in system reporting. If two unique values are used, they should be named differently and reported as 'Ticket Sale Revenue' and 'Fare Revenue'. A record of liability should be maintained for</p>	<p>City Response: The City records the value of ticket books sold and not the value of tickets utilized in each FY. City staff have not tracked and/or reported this level of information on the claim forms, as this is not a current request. City staff will adhere to this request if direction changes.</p>

<p>other report locations and weren't certain what it represented. That would explain why the Claims Form doesn't match the reports. However, the Route Match reports also don't match each other, as the earlier table shows. It also explains why a simple calculation of the total Fare Revenue does not equal an average \$4.50 rider fare multiplied by the number of passenger boardings.</p> <p>Additionally, anomalies in the value of Fare Revenue in the Claims Form make no sense: a high of \$92,001 Actual fare revenue for FY21/22 to a low of \$0 Actual fare revenue reported collected for FY20/21 and FY22/23 in the budget detail provided. When asked about the high \$92,001 fare revenue year, City staff stated that they must have anticipated a service increase or other issue that would result in more riders. However, the \$92,001 was a fiscal year Actual value, not a Projected value. Because Fare Revenue is for tickets sold, the City should have a liability record for tickets sold but not used. According to the Finance staff, they do not track that liability.</p> <p>Additionally, all staff were unaware of where the \$2.50 per client annual Rider ID Card cost was being included as revenue – in the City general fund or to the Paratransit Fare Revenue. Finance staff was not even aware that an ID fee was being charged.</p>	<p>the outstanding value of tickets sold but not collected and if the required ID card is maintained, and used only for the Paratransit service, it should be considered as program revenue. If, in fact, the 1,770 noted active clients are each required to obtain a new ID annually at a cost of \$2.50 it represents more than \$4,300 in revenue.</p>	<p>The City collects detailed information on each fare book sold which is included in our MUNIS system (financial system). Any anomalies regarding fare revenue shown as actuals may have been a result of revenue from non-paratransit revenue mistakenly hitting the wrong account. The City receives revenue from other transportation-related activities and the revenue may have been recorded in the wrong account. MUNIS reports will show the revenue although staff is able to drill down and recognize that the revenue was recorded wrong.</p> <p>Within the last FY to address this issue and provide additional support to paratransit, a Finance Manager is now working with paratransit staff and ensuring that revenue and expenditures are hitting the correct accounts.</p> <p>The only revenue the City receives to support paratransit services from the Measure J funds and fare book sales.</p> <p>The City's Business Office located in the Finance Dept receives all fares collected. All fares received do not come directly to the Transportation Division but is mailed or brought to the City's Business Office who then records. We have used the same claim form to report in prior years and this was never a question. So maybe it's the contents of the claim form and the spreadsheet that is unclear.</p> <p>City staff will investigate the Rider ID card to determine if this is a requirement for paratransit riders that we still need to utilize. If this is a feasible or required option, we will move forward accordingly.</p>
<p>Identified Issue #21:</p> <p>Staff & Driver Training. Per staff on the Working Group Call, driver training isn't needed. The reason seemed to be that because a Commercial Driver's License (CDL) is not required for vehicles with their passenger-carrying capacity, no special training was deemed necessary. The Audit Team confirmed that a CDL is not required. City staff instead noted that pre-Covid, an administrative employee with the program would ride along every six months or so to check that the drivers were operating the vehicle appropriately. In cases where a driver is not available, staff cited that an administrative employee would drive the van and that they could use training because '..she's not a driver', but she's pretty good.'</p> <p>Per the Site Visit, drivers say that they need to turn in a photo of their valid driver's license annually and maintain CPR First Aid certification through the City. They stated that they receive no other training. Drivers cited that vans have insurance cards and accident kits on board, and they were confident that they knew the procedures to handle an accident.</p> <p>When asked about drug testing, administrative staff didn't know if testing was done. The drivers are part of a union, but it is an administrative, not a drivers' union. All staff said they have no regular interaction or communication with the union; they just pay their dues. It appears that the union contract does not hold the drivers accountable to drug testing.</p>	<p>Recommendation:</p> <p>At a minimum, and per basic program needs, any driver transporting members of the public, regardless of vehicle size, should have Defensive Driving Training with a refresher every three years. The Audit Team's Paratransit Consultant noted that the ADA has a list of requirements for employees who work with customers with disabilities to be 'trained to proficiency' to include use and care of accessibility equipment; securement of mobility devices; sensitivity training; and understanding disability in general. While not an ADA paratransit service, given the specialized population they serve, drivers should, at a minimum, have mobility device training and training for working with riders with physical and cognitive disabilities. A training program should be implemented and maintained. Pre-employment and accident/incident drug testing should be required if it is not, and random drug testing implemented.</p>	<p>City Response:</p> <p>Commercial licenses are only required for passenger vehicles based on the number of seats.</p> <p>The statement "she's not a driver but pretty good" was meant to say that everyone is doing the best they can do given the lack of resources and funding. Because vans are utilized for the service, the part-time scheduler may drive if necessary if they have a CA D/L.</p> <p>In addition to requiring a CA/DL, City staff is working with the City's Human Resources Department to discuss offering non-required driving courses that can support driver training (i.e. Defensive Driver Safety and Maneuvering Driver Course).</p>

<p>Identified Issue #22: Personal Care Attendants (PCA). The City is carrying a high number of free PCAs compared to client passengers considering that they carry seniors in addition to passengers with disabilities. While inconsistent across the unique Route Match reports, for FY21/22, as the earlier chart shows, reported attendant numbers were around 1,250 compared to total Paratransit passengers of around 1,850 (approximately 1,400 ambulatory and 450 wheelchair). Based on these figures, two-thirds of riders are boarding with an attendant. City staff stated on the Working Group Call that they want clients to have a free attendant for all rides, and two if they need it. They don't certify or verify attendants, saying instead, that whoever can help them load is the attendant.</p>	<p>Recommendation: Encouraging the use of Paratransit service PCAs can be beneficial in reducing customer incidents. However, the PCA is not a substitute for the driver, and the operator should not be delegating safety-related or rider loading responsibilities to PCAs under any circumstances. A transit entity cannot require that a rider be accompanied by a PCA and the ADA states that transit entity personnel must assist individuals with disabilities with the use of ramps, lifts, and securement systems. The possibility that attendants are being encouraged to ride with a client because of a driver limitation or other reason is concerning.</p> <p>The Audit Team's Paratransit Consultant identified that in their experience, for ADA paratransit services, the percentage of clients bringing a free attendant is generally 14%-16%. As the City is around 67%, they should assess both the abilities of the current drivers to assist riders, make it clear to passengers that PCA's are welcome but not required, and that only one PCA is allowed per customer.</p>	<p>City Response: The City agrees that the use of Paratransit service PCAs can be beneficial in reducing customer incidents and may help a client feel comfortable and supported during transit. City staff agrees with the recommendation and will assess both the abilities of the current drivers to assist riders, make it clear to passengers that PCA's are welcome but not required</p> <p>If it is the city's discretion and not a requirement, City staff will discuss the number of PCAs authorized per customer and will include that information in our updated policies.</p>
<p>Identified Issue #23: Software systems and data handling. Staff noted that they were no longer paying a fee to Route Match for the software. They cited purchasing the software '5-7 years ago' and no longer had any interaction, training, or support from Route Match. They recognized the software's limitations and incompatibility with other IT services within the city, and had, at the time of the audit, secured a new software system with Via. It was expected to roll out on April 11, 2024.</p> <p>On the day of the Site Visit the Via software was not working properly. One of the drivers could not log into their tablet, and IT was unable to help. The driver proceeded on route without using the tablet. The second driver had their tablet operating but turned the sound down because it was giving audio driving directions that were not their preferred driving route. The driver didn't engage with the tablet for the ride-along trip. As the Route Match costs would not have been included in recent year's budgets, the new Via contract cost will be an add-on to the existing program costs, which will have an impact on overall cost and cost per passenger.</p>	<p>Recommendation: Per staff, the Via training crew visited twice, but they moved too quickly and didn't give time for City staff to understand the system. Staff need additional training and support for the new Via software. They need a clear understanding of the system automation options, and how to make best use of the program, not only with their current limited capacity, but if the program can be grown. While City management staff seemed confident that new software would be a valuable tool in addressing program issues, they must also recognize that software is not a substitute for good program management, and both are needed to realize the full advantages of a software system.</p>	<p>City Response: This is a new service our drivers our navigating through it and with the lack of resources its challenging to be effective.</p>
<p>Identified Issue #24: Website. The Richmond Paratransit website should be the primary source of public information for the R-Transit and Lyft services. It is presented on the City's website under a 'Transportation' parent page which also highlights biking, commuter resources, and other public transit services.</p> <p>The Audit Team reviewed the website and found it to include basic information in English about the two programs, including service area, fares, and steps to apply. The information, however, is not current. The landing page for the Paratransit service includes a notice from 2018 stating that the office is relocating and a Holiday Service Schedule from 2019. Other pages within the program site also reference meetings to be held in 2019. Visitors to the page may question if the program is actively operating.</p> <p>The Lyft brochure provided to the Audit Team does not list the website as a resource. Contrary to information submitted in Claims, no other link to the website was found on the websites of other</p>	<p>Recommendation: The program website should be updated regularly. A website is the most basic information a program can offer and the City is not taking advantage of what can be their most valuable information and promotional tool. As the program pages already exist, keeping them active and updated should cost the City very little.</p> <p>The website should offer information in Spanish, or at a minimum, it should include a statement, in Spanish, citing a phone number to call for assistance. If the City has not already done so, the website should be made screen-reader compatible.</p> <p>A QR code and short URL leading to the program website should be generated and added to print materials. City staff</p>	<p>City Response: City staff agrees. Resources would allow us to keep this current.</p>

<p>municipalities or WCCTAC. Additionally, an incorrect link to the website is printed on the front of the Client Orientation Guide.</p>	<p>should reach out to jurisdictions, senior resources, and centers for independent living to request that a link to the pages be added to their websites.</p>	
<p>Identified Issue #25: Equity for Limited English Proficiency (LEP). A native Spanish speaker from the Audit Team contacted the primary information number, 510-307-8026, which appears on the website and Lyft brochure, and requested assistance in Spanish on two different occasions. In both instances, she was told “No Habla Espanol” by the person answering the phone who then terminated the call. The Audit Team member was not given the option to speak to someone in Spanish.</p> <p>On the Working Group Call staff cited that they don’t have regular Spanish language assistance, but that the part-time driver is a native speaker. The budget detail cites an annual staff supplement for bilingual services. Per the Finance response to questions, the payroll supplement is paid to the part-time driver of the Paratransit service, so limited translation would be available only to riders of that driver’s vehicle or over the phone in instances where they are providing administrative support.</p>	<p>Recommendation: This and lack of printed materials in Spanish is contrary to requirements of Title VI of the Civil Rights Act specifically, as failing to accommodate LEP persons is akin to discrimination on the basis of national origin. The City should connect with a translation services line such as AT&T, to provide consistent assistance in other languages over the phone. Print materials and website information should be available in Spanish or at a minimum, include a Spanish language statement with detail on how to receive language assistance. All materials should be made available, upon request, in large print, Braille, audio, or a digitally accessible format per the ADA.</p>	<p>City Response: It’s a challenge to offer bilingual service if we do not have the resources for hiring additional staff to assist. We only have one part-time and one full-time office staffers due to the lack of resources. City staff can work with Human Resources to identify bilingual speakers that paratransit staff can send calls or clients to.</p>
<p>Identified Issue #26: Program Brochure. The City references a Lyft brochure in their annual Claims to CCTA. The brochure was provided to the Audit Team. The brochure is in English, and no Spanish language version appears to exist. No accompanying brochure specific to the Paratransit service appears to exist.</p> <p>The Audit Team reviewed the Lyft brochure and found it to include basic information about the Lyft program, including trip cost, and steps to apply. It does not include a website address. The information, again, is not current, as the back panel of the brochure encourages potential users to attend 2019 workshops. As with the website, potential clients looking at the brochure may question if the program is actively operating. Additionally, the information blends promotion of the Lyft service with ‘Hours of Operation’ of the Paratransit service, confusing readers about when the Lyft service is available. The Claims Forms indicate that the Lyft brochures are available at ‘...senior centers, government offices, senior housing complexes, doctor/dental offices and anywhere seniors travel.’ The Audit Team visited five senior and medical centers in Richmond on March 26, 2024, but did not find Lyft brochures to be available at any of the locations. A listing of the sites visited, and the Audit Team experience at these locations is available in Attachment 2.</p>	<p>Recommendation: Ideally, the City should develop a new brochure with promotional information about both the Paratransit and Lyft services. The brochure should be available in English and Spanish, or at a minimum, it should include a statement, in Spanish, citing a phone number to call for assistance. The existing Lyft brochure should be updated, and the most valued attributes of the service highlighted. The brochure should include a QR code leading to the service website. The brochures should be delivered in inexpensive plexiglass holders to all the locations cited in the Claims Form and a business card or note added to the back of the racks citing who to contact to refill the rack. Printing costs should be minimal, and as a passive form of promotion, once new brochures have been delivered, staff time to restock should be minimal.</p>	<p>City Response: Clients who have called our office are aware of the LYFT service and the van service. The active workshops held in 2019 were because of the newly operated LYFT service. As stated previously we would love to update and provide continual workshops and new brochures but operating with limited resources is a challenge in making this a viable service.</p>
<p>Identified Issue #27: Client Orientation Guide. The City provided the Audit Team with a Client Orientation Guide during the Site Visit and another was offered by senior center staff on an Audit Team visit to locations in Richmond. One Guide was dated 2020-2021 and the second was dated 2021 and included a 2021 Holiday Schedule. Both include a web address on the front: www.rtransit.com that opens to a site offering to sell the URL. The actual City site is https://www.ci.richmond.ca.us/2880/R-Transit-Paratransit.</p> <p>The Guide includes information that does not align with information given by the City on the Working Group Call or at the Site Visit. For example:</p> <ul style="list-style-type: none"> • Clients are told in the Guide that No Shows or Late Cancellations will result in a charge equal to the fare. On the Working Group Call, staff said this is not their practice. • One of the two Guides states that reservations can be made up to 10 days in advance while the other Guide, the website, City staff, and Claims submittals cite that reservations can be made 30 days in advance. • The Guide outlines the need for an Identification Card, renewed annually, that must be shown to receive services or purchase ride coupons. Staff on the Working Group Call said that the ID is required 	<p>Recommendation: Errors in the Client Orientation Guide should be corrected, and the booklet updated annually so that new clients receive accurate information. Updated Guides should be distributed to centers for independent living, senior centers, and other sites that are able to promote and share information about the City’s services.</p>	<p>City Response: These are not discrepancies, but service provided by our servicers TransMetro and LYFT. Perhaps there was a misunderstanding on the auditor’s behalf. All information is correct and accurate.</p>

<p>but is never requested from a client. During the Site Visit ride along, the Audit Team staff witnessed riders boarding and purchasing ticket books and an ID was never requested.</p> <ul style="list-style-type: none"> • The Guide states that 'one certified' PCA will be allowed. Staff have stated that they do not ask for any certification and allow two attendants in some cases. 		
<p>Identified Issue #28: Client and Ridership Opportunities. Data from the City's FY23/24 Claim Form cites 1,770 active registered clients in Richmond's R-Transit program. According to the United States Census Bureau, Richmond had a population of approximately 114,000 in 2022, with 14% aged 65 or older, representing approximately 16,000 residents. Richmond's R-Transit program is open to all residents ages 55+, which means more than 16,000 seniors are eligible for the R-Transit and Lyft services. As much of Richmond is an Equity Priority Community with a higher-than-average rate of poverty, access to low cost, on-demand transportation should attract a much larger user base than currently exists. The lack of users can be attributed, in part, to poor outreach and promotion.</p> <p>Additionally, for the 2020 period that the City provided Lyft data, the average total one-way trip cost was \$11.85. After the subsidy, riders paid an average of \$3.12 per one-way trip. Less costly than the Paratransit service, and available all hours and seven days a week, there should be a significant untapped market for the program.</p>	<p>Recommendation: Given the previously noted low cost of subsidized Lyft rides, the limited staff time needed to support the Lyft program, and the extended hours and days of operation it affords clients, the City should focus on robust promotion of the Lyft program to increase its client base and ridership. However, the City should also assess if the existing Lyft service must also be supplemented to provide parity in programs to accommodate customers in need of mobility assistance.</p>	<p>City Response: City staff agrees that there is an untapped market to attract potential users to the service, however lack of revenue prevents the City from accomplishing this goal. The City did however contract out to LYFT since 2018 to ensure mobility options for all users. We now need resources to increase clientele, without resources the service will continue to operate ineffectively.</p>
<p>Identified Issue #29: Customer Feedback. The City offers a Paratransit Survey on its website soliciting ratings on a variety of elements of its service including the reservation process, drivers, vehicles, and trip delivery. The City provided the Audit Team with all survey submissions. Since 2015, they have received a total of 10 individual survey responses. The most recent was from 2018.</p> <p>All surveys fall outside of the five-year window of audit review, and at just 10 total responses, are an insufficient data set to be used to assess the City's service. What is relevant, however, is that the survey is not being used. Additionally, when asked if they kept a log of client feedback received via the phone, they said they do not.</p>	<p>Recommendation: The City should contact all clients once per year, via mail or email, for the express purpose of soliciting feedback on their service. The survey should be featured prominently on the website in English and Spanish, and an option to call the City to complete the survey over the phone should be provided. Responses should be analyzed each year for ways to improve the customer experience. Third-party contractors are often used to manage and implement surveys for transit agencies, which not only saves staff time but also adds a measure of objectivity. A log of all client comments, complaints, and commendations should be maintained and the information used to evaluate and improve the program.</p>	<p>City Response: Due to decreased financial resources and staffing contracting a service to do surveys was unavailable. In the past we relied on a citywide survey conducted to report findings.</p> <p>There is nothing in the Measure J Claims form that state we must complete surveys. In 2015 to present no surveys have been conducted due to the lack of resources and staffing.</p>

DRAFT
CITY OF RICHMOND PARATRANSIT SERVICES
PERFORMANCE IMPROVEMENT PLAN
UPDATE

RICHMOND CITY COUNCIL MEETING
SEPTEMBER 24, 2024

OVERVIEW OF RICHMOND PARATRANSIT SERVICES

Program	Service	Provider	Projected Annual Rides	Funding Source
R-Transit with City Staff	Door-to-door	City staff	2,100	Measure J
R-Transit with TransMetro	Door-to-door	TransMetro	600	Environmental & Community Investment Agreement
R-Transit with Lyft	Curb-to-curb	Lyft	19,000	Measure J

FY 2024-25 PARATRANSIT PERFORMANCE IMPROVEMENT PLAN

#	Desired Outcome	Audit Recommendation
1	Accurate performance and financial data	1,4,5,12,13,19,20,23
2	Continuous monitoring, evaluation, & incremental improvements	3,4
3	Functional paratransit vehicles	16
4	Paratransit staffing	17,21,22
5	Address administrative cost	7,8,9
6	Approve Measure J funding for FY 2024-25	1,2,5,6,9
7	Resolve Measure J funding for previous fiscal years	5,6
8	Transfer paratransit program to Public Works	5
9	Increase patronage	15, 24, 25, 26, 27, 28
10	Increase customer satisfaction	29
11	Reduce cost/trip – ambulatory and non-ambulatory	10,11
12	Assessment of service delivery options for FY 2025-26	
13	Approved Measure J funding for FY 2025-26	2

1. ACCURATE PERFORMANCE AND FINANCIAL DATA



INFORMATION FROM VIA
OPERATIONS CENTER



INFORMATION FROM
LYFT



OTHER CITY SOURCES
(ON-LINE)

2. CONTINUOUS MONITORING, EVALUATION, & INCREMENTAL IMPROVEMENTS

- Bi-weekly meetings with Via; and as needed with TransMetro and Lyft
- Monthly reports to monitor performance and financials
- Institute data driven continuous improvement process with Paratransit Team

Draft Sample of a Monthly Report - July 2024 Report

Activity	Description	Program/Provider		
		City	TransMetro	Lyft
Registered Richmond residents	Residents in the City of Richmond	XXXX	XXXX	
Registered unincorporated residents	Residents in unincorporated service areas	XXXX	XXXX	
Total registered residents	Total of incorporated and unincorporated residents	XXXX	XXXX	
Registered Richmond clients that use service	Clients in the City of Richmond	25	13	
Registered unincorporated clients that use service	Clients in unincorporated service areas	1	2	
Total registered clients that use service	Sum of Richmond and unincorporated clients who used service	26	15	
Registered client boardings	Each time a client boards a vehicle	166	42	
Attendee and guest boardings	Each time a client's attendee or guest boards a vehicle	0	2	
Passenger boardings	Sum of client and attendee and guest boardings	166	44	
Revenue service hours	Total hours that Paratransit vehicles are in revenue service	107.2	XXXX	
Passenger boardings/revenue service hours	Total passenger boardings divided by revenue service hours	1.55	XXXX	
Revenue service miles	Total miles that all vehicles operated while in revenue service	578	XXXX	
Average passenger trip distance	Total revenue service miles divided by the total pass. boardings	3.5	XXXX	
Wheelchair passenger boardings	Total number of passenger boardings using a wheelchair	34	21	
No-shows	Total number of times a passenger did not show up	2	0	
Cancellations	Total number of times a passenger cancels a reservation	59	4	
Trips denied	Reservations that are denied for both in-house and outsource providers	0	0	
Reservation denied outside service area	Reservations not made because outside service area	0	0	
Multi-agency trips	Trips that require transfer to another service provided	0	0	
Vehicle accidents	Total number of crashes involving a paratransit vehicle	0	0	
On-time performance	% of passenger pick-ups made within defined service window	99%	XXXX	
All registered clients	Total of all registered clients			XXXX
All registered clients that used service	Each client who used service to complete a one-way trip			XXXX
# passenger boardings	Each time a Lyft vehicle picks up an eligible client			XXXX
Average passenger trip distance	Total revenue service miles divided by the total boardings			XXXX
Extended days or hours passenger boardings	Each time a Lyft vehicle trip is provided outside service hours			0
Extended areas passenger boardings	Each time a Lyft vehicle trip is provided outside service area			0
Cost of service	Lyft's total gross revenues from service			XXXX
City subsidy of service	City's total subsidy for Lyft service			XXXX
# tickets sold	Total number of trip tickets sold (R-Trans and City Hall)	XXXX	XXXX	
\$ amount of tickets sold	Total income from sales of trip tickets sold	\$760+	XXXX	
Passenger boardings	Each time a passenger boards a vehicle	166	44	XXXX
On-time performance	% of passenger pick-ups made within defined service window	99%	XXXX	XXXX
Complaints/passenger boarding	Total complaints divided by total number of boardings	0	1	XXXX
Cost/passenger boarding	Total cost of program divided by total number of boardings	XXXX	XXXX	XXXX

LYFT DATA FROM FY 21-22, 22-23 & 23-24

Pick Up Zip Codes	FY 21-22 Total Rides Per Zip Code	FY 22-23 Total Rides Per Zip Code	FY 23-24 Total Rides Per Zip
(El Cerrito) 94530	935	1,561	2,547
(Martinez) 94553	26	25	17
(El Sobrante) 94564	594	919	1,239
(Albany) 94706	11	10	11
(Richmond) 94707	15	4	25
(North Richmond) 94801	1,046	1,991	2,112
(El Sobrante) 94803	1,277	1,716	2,336
(Richmond) 94804	1,906	3,127	4,383
(Richmond) 94805	427	684	1,117
(San Pablo) 94806	1,859	2,867	3,652
(Other)	1	1	3
TOTAL	8,097	12,905	17,442
TOTAL UNIQUE RIDERS	142	266	991

Note: This information does not cover the drop-off locations

Note for 94806: Covers Richmond, San Pablo, including Tara Hills, Montalvin Manor, Bayview, and Rollingwood

3. FUNCTIONAL PARATRANSIT VEHICLES

- Existing paratransit vehicles – Commitment to maintain as long as needed
- New paratransit vehicles – Ensure functionality and provide for the charging of the electric vehicles

4. PARATRANSIT STAFFING

- Paratransit Coordinator – new position
- Paratransit drivers
- Transportation Division Management

5. ADDRESS ADMINISTRATIVE COST

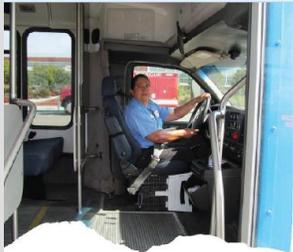
The following options will be considered by the Richmond City Council on September 24, 2024:

1. Limit Richmond's overhead rate to 20% (**Staff's Current Recommendation**)
 - Reduction is comparable to other Measure J Claimants
 - This would reduce the cost of general administration from \$490,000 to \$139,000
 - The difference of \$351,000 would increase the net cost to the City's General Fund
2. Full exemption from Cost Pool allocation
 - The City's General Fund would fully cover the full cost of the cost pool at \$490,000
3. No change
 - The Measure J funded paratransit program would not deviate from the City's existing allocation of Cost Pool and allocate the full amount to Measure J

NEXT STEPS

- Continue to work with consultant and city staff to implement the Performance Improvement Plan (i.e., development of rider's guide, standard operating procedures, outreach, increase in ridership, customer satisfaction methods, etc.)
- Work with Human Resources on staffing needs
- Revise the FY 24-25 Measure J Claim Form to include City Council decision on administrative cost; and use performance data that is based on the actual results through the 1st quarter of the year
- Resolve Measure J funding for previous fiscal years
- Transfer Paratransit Program (and all of Transportation Division) from Community Services to Public Works
- Provide an update, in collaboration with CCTA staff, to the CCTA Board in November 2024

PARATRANSIT OUTREACH MATERIALS



WE'RE READY TO ASSIST

For more information and to check eligibility please use contact listed below.



ABOUT US

Since 1976, the mission of R-Transit is to provide safe, reliable, and low-cost transportation for seniors (55 and older) and individuals with disabilities so as to improve their access to community services and activities, to decrease their experience of social isolation, and to enhance their abilities to remain living independently in their chosen communities.

The R-Transit program is available to persons who reside in the City of Richmond and the unincorporated areas of East Richmond Heights, El Sobrante, Kensington, North Richmond, Hasford Heights and Rollingwood.

CONTACT US :

Phone: (510) 307-8026
 Website: <https://www.ci.richmond.ca.us/2880>
 440 Civic Center Plaza, 2nd Floor
 Richmond, CA 94804

R-TRANSIT

Your Destination for Safe and Reliable Transportation

BOOK NOW AND GET MOVING TODAY!



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About Us

Since 1976, the mission of R-Transit is to provide safe, reliable, and low-cost transportation for seniors and individuals with disabilities so as to improve their access to community services and activities, to decrease their experience of social isolation, and to enhance their abilities to remain living independently in their chosen communities.

Eligibility

R-Transit services are available for residents 55 and older. We also accept residents with disabilities starting at age 18. Applicants between the ages of 18-54 must provide proof of disability. Eligible individuals can also access ridesharing through Lyft.

R-Transit Vans & Lyft

R-Transit clients who require additional assistance from the drivers and/or depend on mechanical aids such as crutches, walkers, and wheelchairs can continue to use the R-Transit program. Lyft is a ridesharing application that connects people with a nearby driver and transports them to their destination. Lyft is best suited for those comfortable with boarding vehicles (including SUVs and vans) without driver assistance.

Phone: (510) 307-8026
 Hours: Monday - Friday, 8:30 am - 5:00 pm

Website: <https://www.ci.richmond.ca.us/2880>
 Address: 440 Civic Center Plaza, 2nd Floor
 Richmond, CA 94804

Service Area

- Richmond
- El Cerrito
- San Pablo
- North Richmond
- El Sobrante
- Kensington
- Pinole

Clients can travel as far North as Pinole and as far South as El Cerrito.

Services Provided

- Medical appointments
- Grocery shopping
- Family visits
- Park outings
- Public transit (Bart/Bus station)
- Group excursions
- Banking errands
- Commutes to work



SENIOR TRANSPORTATION

Richmond Moves

Transportation service is provided by the City of Richmond with services anywhere within our service zone from the Richmond and El Cerrito BART, to the ferry, parks, and more. When you are ready to go book a shared ride, book right from your phone and get picked up, with a price of \$2 (students and seniors ride FREE). Hours of operations: M - F, 7am - 7pm. <https://city.ridemovethrough.com/richmond-moves>



1



R-Transit/ Paratransit

A low-cost transportation program provided by the City Manager's Office provides services to seniors (55 and older) and persons with disabilities (18+ w/ proof of disability) who reside in Richmond and unincorporated areas of East Richmond Heights, El Sobrante, Kensington, North Richmond, Hasford Heights, and Rollingwood. With the hours of operations M - F, 8:45 am - 4:00 pm. <https://www.ci.richmond.ca.us/2880/R-Transit-Paratransit>



2



LYFT with Paratransit

The City of Richmond's paratransit (R-Transit) program partners with Lyft to provide on-demand transportation. Lyft is a ridesharing application that connects people with a nearby driver and transports them to their destination. Seniors could qualify for up to 40 subsidized rides each month. For more information visit: <https://www.ci.richmond.ca.us/3129/R-Transit-with-Lyft>



3



AC Transit

AC Transit serves the western portions of Alameda and Contra Costa counties in the East Bay portion of the San Francisco Bay Area. Apply for the Senior card by following this link <https://www.actransit.org/discount> or by visiting an AC Transit location in person. For more information: Dial 511, then say "AC Transit" or visit www.actransit.org



4



<https://www.ci.richmond.ca.us/3129/R-Transit-Paratransit>

THANK YOU

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510.620.6828