Appendix C - Ridesource Technical Assessment
LTD RideSource Brokerage Programs and Services –
Technical Assessment

Table of Contents

1. LTD’S ACCESSIBLE SERVICES AND RIDESOURCE BROKERAGE
   1. Overview of Services Provided .......................................................... 1
   2. Historical RideSource Experience ...................................................... 2
   3. LTD RideSource Selected Performance Measures Over 10-year Period .......... 6
   4. Ensuring LTD’s Program Compliance with the Americans with Disabilities Act .................................................. 9
   5. RideSource Brokerage as Umbrella for Provision of Trips Under Various Fund Sources ............................................. 11
   6. Cost Allocation Model as Internal Management Tool .................................. 12

2. CONTRASTING LTD’S DEMAND RESPONSE PROGRAM EXPERIENCE WITH OTHER PEER ORGANIZATIONS
   1. Peer Comparisons of Service Area Population and Volume of Trips Provided .................................................. 13
   2. Peer Comparisons of Per-Trip Cost Effectiveness ........................................... 14
   3. Peer Comparisons of Service Volumes Provided in Relation to Population .................. 15

3. PERFORMANCE OF RIDESOURCE PROGRAMS .............................................. 16
   1. Selected Performance Indicators .......................................................... 16
   2. RideSource Brokered Trips by Time of Day and On-Time Performance .................. 20
   3. Distribution of RideSource Brokered Trips .............................................. 23

4. SELECTED RIDESOURCE POLICIES AND PROCEDURES THAT IMPACT SERVICE EFFICIENCY AND SERVICE EFFECTIVENESS ........................................... 26
   1. Assessment of Rider Eligibility for RideSource Brokered Trips ..................... 26
   2. Securing a Trip .................................................................................. 27
   3. Call Taking, Trip Reservations and Trip Scheduling ...................................... 29
   4. Ending the Standing Will-Call Return Procedure ...................................... 29
   5. Reasonable Modification Procedures ................................................... 30

Draft 6/13/2018, page i
SUPERVISION FOR INTERNAL AND EXTERNAL FLEET OPERATIONS ................................................................. 30
COMMUNICATING WITH RIDERS ....................................................................................................................... 31

5. LTD’S SIGNIFICANT RIDESOURCE INVESTMENT IN FACILITIES AND EQUIPMENT ...................... 34
   LTD FACILITIES AT 240 GARFIELD STREET, EUGENE .................................................................................. 34
   SOPHISTICATED CALL TAKING, SCHEDULING AND DISPATCH SOFTWARE .............................................. 34
   RIDE SOURCE INTERNAL FLEET ..................................................................................................................... 36

6. MANAGEMENT AND VEHICLE OPERATIONS CONTRACTS OVERSEEN BY THE CUSTOMER &
   SPECIALIZED SERVICES DEPT. ......................................................................................................................... 37
   MTM RIDE SOURCE MANAGEMENT AGREEMENT ...................................................................................... 37
   RHODE EXPRESS OPERATIONS CONTRACT ............................................................................................... 39
   DIAMOND EXPRESS AND OAKRIDGE DIAL-A-RIDE SERVICE CONTRACT ............................................. 39
   RIDE SOURCE EXTERNAL PROVIDER CONTRACTS ...................................................................................... 40

7. POTENTIAL NEW PROGRAM CONCEPTS AND TOPICS ........................................................................... 40
   POLICY OF “FREE” FARES FOR ADA RIDERS .............................................................................................. 40
   SHOPPER SHUTTLE EXPANDED TO THE GENERAL PUBLIC ..................................................................... 41
   EXPANDING SHARED RIDE POTENTIAL WITH TRIP-LEVEL INTEGRATION OF INTERNAL AND EXTERNAL FLEETS ..................................................................................................................... 42
LTD RideSource Brokerage Programs and Services –
Technical Assessment

This report provides supplemental information about LTD’s RideSource services and programs as background to RideSource topics presented in the JWA Choices Report for Lane Transit District. This appendix considers six areas of relevance to the efficient and effective operation of the RideSource integrated call center and its related programs:

1. An overview of the RideSource brokerage programs and general cost-effectiveness;
2. Contrasting RideSource experience with peer transit organizations;
3. Performance of individual RideSource programs;
4. A review of selected policies and procedures that impact service efficiency and effectiveness;
5. An overview of RideSource resources, facilities and equipment;
6. A review of RideSource contracts; and
7. Potential new program concepts or topics of relevance.

1. LTD’s Accessible Services and RideSource Brokerage

Overview of Services Provided

The LTD Customer and Specialized Services Department administers multiple programs to support the mobility of Lane County residents who may require specialized transportation assistance to be mobile in the community. The RideSource one-call, integrated brokerage is the primary mechanism by which customers are linked with appropriate transportation services. Some customers require ADA complementary paratransit service for origin-to-destination trips. Others are provided with health care trips to specific medical appointments. Some are served with specialized trips, for veterans or Crucial Connections who may travel long-distance to Portland, to VA facilities and elsewhere. Still others are provided with LTD bus passes to meet trip needs that can be served on LTD’s fixed-route network.

A “culture of accessibility” is described and promoted by LTD staff to encourage independent travel and use of the most appropriate transportation service, which could well be EmX services or anything else within the LTD family of services.

During FY 17/18, LTD’s Customer and Specialized Services Dept. oversaw two significant events. New web-based trip reservation, scheduling and dispatching software was installed and became live during July 2017. This replaced long-standing, DOS-based legacy software that had “grown up” with the RideSource program but needed to be upgraded to a more powerful operating system and more expansive software capabilities. Currently RideSource is operating Trapeze/ Novus software TripSpark Version 4.2.12.5, with LTD reportedly the only transit operator in the country with this most recent, highest level upgrade of the TripSpark program.

Secondly, a new management contract was initiated with Medical Transportation Management, Inc. (MTM), which commenced operations on September 1, 2017. The MTM management team replaced the long-standing brokerage operator, Special Mobility Services (SMS). Call taker personnel, internal fleet drivers, maintenance and supervisor staff were considered for re-hire, with many continuing on as employees of the MTM organization.
**Historical RideSource Experience**

**Passenger Trips**

Figure 1 presents the 10-year history of the RideSource program trips provided, as reported into the National Transit Database. Represented are two demand response programs, distinguished by whether trips are provided through RideSource by its contractor MTM on the “internal fleet” of vehicles owned by LTD or are provided on taxis and other for-hire vehicles and collectively known as the “external fleet.” Figure 1 does not include any fixed-route trips supported through the RideSource call center as these are reported elsewhere in NTD reporting.

Figure 1 shows modest growth in the internal fleet, largely ADA paratransit trips, represented in blue bars and growing from 133,000 paratransit trips in 2006 to a peak of 213,000 trips in 2015, dropping to 198,000 paratransit trips in 2016. While 2016 levels represent a 48% increase over 10 years, almost four-fold increases are shown in the Medicaid-supported external fleet-provided trips, as shown in the green bars. The RideSource brokerage began providing Medicaid program trips through Oregon Health Plan and Trillium, now Centene/Trillium programs, on May 19th, 2008. Depicted by the green bars in Figure 1, Medicaid trips brokered through RideSource were not reported into the National Transit Database (NTD) until the 2010 reporting year, accounting for almost 95,000 trips in that year and growing to 306,000 trips by 2016, a 222% increase. There was a jump in trips provided beginning in January 2015 as a result of implementation of benefits under the Affordable Care Act.

![Figure 1](image)

**Figure 2**

Figure 2 shows the relative annual experience of paratransit trips provided by the internal fleet, show in blue, and the Medicaid-supported trips provided through the external fleet, show in green. With the January 2015 ACA implementation of the Medicaid transportation benefit, the internal fleet paratransit trips declined by 7%. Presumably this reflects trips – and persons – who became eligible for certain ACA transportation benefits who had previously been taking RideSource brokered, paratransit trips on LTD’s internal vehicle fleet.
Vehicle Revenue Miles

These patterns of increase in trips provided are similarly reflected in vehicle service miles traveled, as shown in Figure 3.

The internal fleet annual vehicle revenue miles, shown in blue, grew from just over 800,000 in 2006 to 1.5 million revenue miles in 2018. This 82% increase is almost double the 48% increase in trips provided over the same period, suggesting that more trips are longer than they were 10 years ago. The external fleet, shown in green, also experienced substantial increases in vehicle revenue miles. This seems consistent with the introduction of Affordable Care Act benefits that began to be realized in 2014 and 2015. External fleet revenue miles for the external fleet were 761,000 in 2010 and increased almost 400% to 3.8 million revenue miles by 2016.

There are important differences in how mileage is reported for both the internal and external fleets. The MTM drivers operating the internal fleet vehicles report “vehicle revenue miles” from the time of the first passenger pick-up through to when the vehicle is no longer available for service, either because the driver is out of service for lunch or is returning to the yard. For the taxi or for-hire external fleet of vehicles, it is presumed that mileage reported relates only to the specific, authorized trip provided. It generally will not include the mileage between trips provided as the next trip might not be a RideSource brokered trip. The impact of this difference in reporting practice is that total “vehicle revenue miles” reported will always be fewer for the external fleet than for an internal fleet vehicle-in-service to the RideSource program throughout its shift.
Annual Operating Expense

Operating expense is presented in Figure 4 showing NTD reported operating costs for 10 years for the internal fleet, in green, and the external fleet, in blue.

As shown, internal fleet operations grew from $2.6 million in 2006 to $6.2 million in 2016, a 136% increase over ten years. External fleet operations grew from the 2010 reporting year total of $3.8 million to $9.1 million in 2016, a 170% increase over seven years.
Trips Provided Across Program Types

To better understand the distribution of trips across the various programs and modes RideSource administers, a detailed examination of December 2017 trips was undertaken. Figure 5 depicts three general groupings of trips:

- a little less than a quarter (23%) of trips are provided to eligible persons as ADA Complementary Paratransit trips or related program trips;
- about two-thirds (64%) are health care-related demand response trips provided generally on Medicaid programs;
- 13% are bus pass trips on fixed-route or other special programs, including veterans’ trips.

Figure 6 considers this December 2017 experience in relation to unique persons served and in relation to trip types: ADA paratransit, health care reimbursed trips and other specialized transportation that includes bus pass purchases.

Analysis of the unique individuals served shows that 1,049 persons received ADA complementary paratransit trips during December 2017; 4,374 persons received health care trips provided through RideSource dispatched vehicles; and 5,931 persons received purchased bus passes or trips provided on Crucial Connections, veterans or by volunteers.
LTD RideSource Selected Performance Measures Over 10-year Period

The National Transit Database (NTD) provides information for several performance measures for LTD RideSource service. This section examines a 10-year reporting period (federal fiscal years 2006 to 2016 of October to September), to consider changes and trends in measures that include productivity, operating cost per vehicle revenue hour and unlinked passenger trip.

Revenue Hours

Annual revenue hours are presented for the internal fleet vehicles only, because this is reliable data maintained by drivers and for vehicles exclusively under LTD’s control, by its subcontractor MTM. Revenue hour history for the internal fleet is depicted in Figure 7, shown as steadily increasing to the current level of almost 123,000 revenue hours. This is almost double what it was ten years ago at 65,000 revenue hours. Over the past four years however, the annual increases have been very modest, fluctuating between a half percent to 1.5% increases annually and a much lower level of increase than in previous periods.

Passengers Per Revenue Hour

Revenue hour information enables the calculation of productivity or passengers transported per revenue hour. This is an important indicator of the efficiency of a service, important to monitor whether

---

1 Revenue hour information reported for the internal fleet vehicles in dedicated service to RideSource differs from that collected by taxi cabs and other for-hire vehicles. For dedicated vehicles, revenue hours and revenue miles as defined by NTD are collected from first passenger pick-up to last drop-off, with the driver either going out of service onto a lunch break or deadheading back to the yard. For taxis and for-hire vehicles, reported vehicle hours and miles are generally captured only when the passenger is on-board the vehicle and, as such, these data sets are not directly comparable to dedicated vehicle demand responsive service.
this is increasing or decreasing. Figure 8 presents annual productivity — passengers per revenue hour — is again shown for only the internal fleet vehicle operation. Because the external fleet vehicles are not exclusively in service for RidesSource passengers but are open to and used by the general public or other contracted services, revenue service hours and productivity indicators cannot be reliably captured. External fleet productivity is not, therefore, be presented.

In Figure 8 the blue bars show the productivity measures, declining over the past ten years from a high of 2.0 passengers per hour to the 2016 level of 1.6 passengers per hour. This coincides with a decline in passenger trips provided which can be expected to depress productivity levels.

Operating Cost Per Revenue Hour

Operating cost per vehicle revenue hour is defined as the average operating cost incurred by the agency for each hour that a RideSource internal fleet vehicle is in service. This performance metric illustrates the cost effectiveness of the agency relative to hours of service provided. Fluctuations shown in Figure 9 are generally due to changes in operating costs and/or the number of vehicle service hours provided during the reporting year. Again, only internal fleet costs per revenue hour are presented in Figure 9 as operating cost per revenue hour is not a reliable or meaningful metric for the external, for-hire fleet where reimbursement is made on a per-trip basis.
Figure 9 shows that operating costs per revenue hour for the internal fleet have slightly increased over time, with the largest increases occurring in 2007 at 6.0% and in 2016 at 7.2% when compared to the previous year. These rates of increase may be due to the more significant increases in operating costs (18.9 and 7.7% respectively) than the increase in revenue hours provided (12.2% and 0.5%) during the reporting year. While LTD’s contract payment to MTM is made on the basis of per trip costs, the number and expense of revenue hours of service provided are major cost levers on the overall program and important, therefore, to monitor.

Cost per Trip

Another measure of cost effectiveness is the operating cost per unlinked passenger trip. This metric, which examines the operating cost on a per trip basis is developed from the passenger counts and total operating cost data available for both the internal and external fleets. Changes in this metric are primarily due to changes in operating costs or changes in the number of trips provided in the reporting year or both factors.

Figure 10 presents the per trip costs for both programs. The internal fleet per trip cost shown in blue and the external fleet per trip cost shown in green. For the internal fleet trips, the operating costs per trip continue to increase over the 10-year period, from a low of $19.82 to the most recent period rate of $31.41. Between 2015 and 2016 the RideSource internal fleet operating cost per trip increased significantly, a 16.1% increase when compared to the previous year. This increase in cost is primarily due to a -7.2% drop in unlinked passenger trips during the reporting year.

The external fleet per trip costs, shown in green, reflect a decrease rather than an increase although historically these per trip costs have been much higher than the internal fleet vehicle trip costs. During the first reporting year, in 2010, the average annual external fleet per trip cost of $36.95 was 53% above the comparable figure that year of $24.12 for the internal fleet. The decline in the external fleet trip cost was an impressive 21%, from the 2013 high of $37.81 to the 2016 per trip cost of $29.81, as presented in Figure 10. This is presumably a positive impact of the economies of scale realized in increased trips but may also reflect careful dispatching to the most cost-effective external provider.
Ensuring LTD’s Program Compliance with the Americans with Disabilities Act

Lane Transit District, as the operator of fixed-route public transportation services, is required by the Americans with Disabilities Act (ADA) of 1990 to provide complementary paratransit services for those persons who are not able to use fixed-route services because they are substantially disabled. The RideSource program is LTD’s ADA complementary paratransit program, providing origin-to-destination service to persons within the ¾ mile of LTD fixed route services and on the days and during the operating hours when its fixed routes are operational, among other criteria. As noted previously, almost a quarter of the trips that are dispatched through the RideSource integrated brokerage are these “traditional” ADA complementary paratransit trips.

Table 1 enumerates the Americans with Disabilities Act complementary paratransit service requirements, as set forth in 49 CFR Part 27, Subpart F, Section 37.131, and characterizes LTD compliance in each area.

Table 1, LTD Compliance with ADA Complementary Paratransit Requirements

<table>
<thead>
<tr>
<th>Service Criteria Required by ADA 49 CFR Part 27, Subpart F, Section 37.131</th>
<th>LTD RideSource Brokerage ADA COMPLEMENTARY PARATRANSIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eligibility: Persons certified as unable to use fixed route services for all or some (conditional eligibility) trips</td>
<td>MEETS AND EXCEEDS – ADA riders who are certified by RideSource are provided with trips; those who may be eligible for other RideSource programs. In-person assessment may establish “Temporary,” “Conditional” or “Full” eligibility.</td>
</tr>
<tr>
<td>Service Criteria Required by ADA</td>
<td>LTD RideSource Brokerage ADA COMPLEMENTARY PARATRANSIT</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>49 CFR Part 27, Subpart F, Section 37.131</td>
<td></td>
</tr>
<tr>
<td><strong>Geographic area of service:</strong> Service must be provided within ¾ mile of all fixed-routes</td>
<td>MAY EXCEED based upon trips provided by the full array of RideSource programs.</td>
</tr>
</tbody>
</table>
| **Hours and days of service:** Must operate on the days and during the hours when fixed-route services are operating | MEETS – Seven days per week:  
Monday- Friday 5:30 a.m. to 10:30 p.m.  
Saturday 7:00 a.m. to 10:30 p.m.  
Sunday 8:00 a.m. to 7:30 p.m. |
| **Fare:** No more than double the base fixed-route fare | MEETS – ADA fare of $3.50 versus LTD Fixed route base fare - $1.75 |
| **Capacity constraints:** All trips requested by ADA certified riders can be served. No denials are allowed. | LIKELY MEETS- No information that trip denials are experienced by ADA users; given Call Center capability to dispatch trips to the RideSource brokerage network, denied trips are very unlikely. |
| **Response time:** Trips must be provided within one hour before and up to one hour after the requested or negotiated trip time | MEETS - Trips are scheduled to “when do you need to be there by”, provided within 15-minutes on either side of the promised pick-up time, generally within forty-five-minutes of requested delivery time. |
| **Trip purpose:** There may be no restrictions based upon trip purpose. | LIKELY MEETS – While trip purpose questions are not typically asked of ADA riders given the prohibition of restrictions on the basis of trip purpose, RideSource callers are routinely asked about trip purpose with some trip purposes inferred through the requested destination or through the rider’s trip eligibility parameters. Presumably though for ADA certified riders, there is no restriction based upon trip purpose. For some non-ADA riders carried on RideSource brokered trips, trip purposes requested ensure consistency with program funding eligibility guidelines for which individual riders may be eligible. |
| **Ride times:** Excessive trip travel times are not allowed. Travel times generally shall be no more than twice the trip length on fixed route | LIKELY MEETS - No information was provided on passenger ride times. Metro ADA and other ADA program average trip lengths suggest that trip travel times likely fall within required minimums of no more than twice the trip length on fixed route. |
| **Advance reservation capability:** Trips must be provided to requests made at least one day and up to fourteen days in advance. | MEETS – Shared ride reservation capabilities up to 5 p.m. the day before and up to 14 days in advance, with some same-day capabilities on a space-available basis. |
| **Reservation making:** Reservation capability must be available during normal business hours and the day prior to any service day. | MEETS – RideSource call center open seven-days-a-week, with recording capabilities during non-operating times. |
| **Door-to-Door Service:** Door-to-door service must be available upon request. | MEETS - Curb-to-curb service is normally provided; door assistance may be requested at the time the trip is request is made. Rider database records retain rider mobility requirements, including reasonable accommodation requests. |
Service Criteria Required by ADA
49 CFR Part 27, Subpart F, Section 37.131

Subscription service: No more than 50% of service capacity can be assigned to subscription, standing order trips during any single hour of the operating day unless there are no trip denials.

LTD RideSource Brokerage
ADA COMPLEMENTARY PARATRANSIT

EXCEEDS - RideSource MTM managers estimate of 65% to 70% of internal fleet operations are subscription trips. This does not however impact the “casual” rider because those trip requests can be served by the external fleet if the internal fleet service is otherwise at capacity. This use of internal and external fleets ensures higher productivity on dedicated vehicles and cost-effective use of the external fleet for trips that might not be easily dispatched as shared-rides.

RideSource Brokerage as Umbrella for Provision of Trips Under Various Fund Sources

As has been noted, the RideSource brokerage serves multiple programs, over and above provision of service to meet LTD’s obligations under the Americans with Disabilities Act. Categories of programs include ADA and ADA-related services, those that are health plan and Medicaid-supported and some “other” programs that fall into neither of the first two categories. Exclusive of bus passes, Figure 11 depicts the RideSource funding programs that supported trips during December 2017.

Figure 11
As shown in Figure 11, the December 2017 trip-making experience is presented in terms of primary funding sources and described as follows:

- **66% of trips are health-related, Medicaid-supported**
  Trips supported by the Oregon Health Plan (60%) and the several tiers of the Medicaid waivers through the Centene/Trillium programs (6%) involve partnerships with the Oregon Health Authority and the Oregon Department of Human Services. These trips are funded largely by Medicaid reimbursements.

- **33% of trips are ADA-related**
  Trips provided as general Metro ADA trips (16%), Developmental Disabilities work program trips (14%) Pearl Buck Center trips (2%), ADA Shopper Shuttle trips (1%) and Florence ADA trips (0.2%), supported by passenger fares, agency fare contributions, FTA Section 5310 funds, Oregon State Transportation Funds and LTD general funds.

- **Less than 1% of trips are “other”**
  Trips provided through three programs, together involve about 750 trips annually. This small fraction of the overall half-million trips provided includes: Crucial Connections, the Veterans transportation service and volunteer trips. These trips are supported by various human service agency funding sources.

More about the performance of each of these programs is presented later in this document.

**Cost Allocation Model as Internal Management Tool**

Managing a brokerage as extensive and with as many providers and funding partners as Lane Transit District’s RideSource comes with a host of complexities in the distribution of program costs to sponsoring agencies. The Customer and Specialized Services Department staff developed the current Brokerage Cost Allocation Model to assist in assigning direct and indirect cost rates by line item, across its funding programs. The model includes costs from operations, administration, provider payments and facilities, assigned to each program. Program costs are allocated based on the proportion of trips delivered under each program. This is a simple methodology that has been agreed upon by all funding partners and easy to use by Lane Transit staff for developing cost-sharing agreements, internal budgeting and informing the Board.

Among transit services it is not uncommon to use a two variable method based on service hours and miles or a three-variable model which adds in considerations for peak vehicles to the cost allocation. Historically, LTD has had more complex cost allocation models however, the current RideSource brokerage, with its multiple contracted operators, is using a simpler model – one that is more easily generated and has been accepted by the participating sponsor agencies. In this case, the rationale for distributing costs is logical and appropriate for monitoring both costs and trip volumes.

In FY 2016/17, the cost model was used to allocate more than $15.5 million in direct and indirect expense across 13 funding programs. The largest single category of expense lies in provider payments at almost $7.4 million or almost 48%. The widest distribution of costs is seen in the expense related to LTD’s RideSource contractor, then Special Mobility Services (SMS), for the operation of its internal vehicle fleet and the call center. In total, the cost model distributed more than $6.2 million in SMS-related program expenses during FY 16/17.
2. **Contrasting LTD’s Demand Response Program Experience with Other Peer Organizations**

A comparison of demand response service among LTD’s nine peer agencies provides insight into the RideSource program effectiveness. These peers were selected by LTD, in consultation with the JWA team, as an appropriate group of public transportation providers against which LTD fixed route and demand response performance could be contrasted. In these comparisons, National Transit Database 2016 data is extrapolated to consider the following attributes:

- **Service area population** – the population of those living within agencies’ service areas, useful in describing program scale and in determining a trips-per-capita measure.
- **Unlinked passenger trips** – the number of trips taken on demand response service for each of the agencies.
- **Operating costs per unlinked passenger trip** – the operating cost of demand response service per unlinked passenger trip. This metric examines where RideSource ranks in terms of cost-effectiveness on a per trip basis.
- **Trips-per-capita** – this measure shows the rate of consumption of demand response services in relation to the overall service area population.

**Peer Comparisons of Service Area Population and Volume of Trips Provided**

Some analysis of the experience of peer organizations offers insight into the relative strengths of LTD’s RideSource program. Service area helps convey the scale of each program. The NTD defines Service Area Population as “a measure of access to transit service in terms of population served and area coverage (square miles). The reporting transit agency determines the service area boundaries and population for most transit services using the definitions contained in the American with Disabilities Act of 1990 (ADA), i.e. a corridor surrounding the routes ¾ of a mile on either side” (National Transit Database Glossary, April 2018). Figure 12 depicts peers’ reported service area populations.
As illustrated in Figure 12, LTD’s 300,000 service area population is ranked second when compared to nine peer agencies considered in the JWA Choices Report. Spokane, Washington, has the largest service area population of this peer group of operators at just over 400,000 persons, with two providers serving populations below 150,000, and the remaining six providers with populations between 150,000 and 275,000 persons.

Figure 13 illustrates unlinked passenger trips taken on demand response service for each of the peer agencies. Again, LTD ranks second in the number of trips provided in 2016. The high number of demand response trips suggests that a strong market exists for this service type, compared to the peer agencies.

**Peer Comparisons of Per-Trip Cost Effectiveness**

Operating cost per unlinked passenger trip is a performance measure that examines service cost effectiveness at the trip level. Lower operating costs per trip are associated with a variety of factors including location of service, labor rates in specific geographies, operations management, and the number of trips provided.

Figure 14 indicates that LTD ranks fifth and sixth in operating costs expended per unlinked passenger trips. LTD’s per trip cost for the internal fleet only of $31.42 and for the combined internal and external fleet of $30.44 are both shown. Both are at or above the median per trip cost of $30.44 for these transit programs.
Peer Comparisons of Service Volumes Provided in Relation to Population

Figure 15 reveals that when compared to its peers, LTD is near the top, ranking second in the number of trips provided relative to the overall service area population, with a high trips-per-capita measure of 1.7. Only the Salem, Oregon transit program ranks above LTD’s with eight other peers providing fewer trips-per-capita by a significant margin of 1.1 and lower. This demonstrates a higher usage rate for the demand response services provided through RideSource and is consistent with the agency’s second-place ranking in the number of unlinked passenger trips provided in the 2016 reporting year.
Another way to consider the volumes of service provided is in relation to the modes of service. Figure 16 looks at the percentage of trips provided by mode, whether fixed route or demand response service.

Again, Salem Transit District experience differs from that of most of the other peers, providing about 84% fixed route service and 16% demand response trips. However, LTD follows next with 95% fixed route and 5% demand response trips. As shown in Figure 16, LTD demand response trips are comprised of those supported by Medicaid and provided on the external fleet which are about 3.3% of the total, shown in gold, and by demand response, ADA-related paratransit trips provided by the internal fleet, at 2.6% of the overall LTD trips and shown in green.

Figure 16

Other peer organization experiences presented in Figure 15 show diminishing proportions of demand response, paratransit trips – from 4% to 3% to less than 1%. It is presumed, although not verified, that the bulk of the demand response trips provided by the peer agencies are supported only by agency general funds and fares and that LTD is unusual in its ability to provide specialized transportation to its service area population that is supported in part by health care funding.

3. Performance of RideSource Programs

Selected Performance Indicators

Table 2 presents selected performance indicators of ten individual programmatic categories within the overall RideSource program. These are discussed in terms of 1) ADA and ADA-related programs, 2) health care and Medicaid-related programs, and 3) “other” Ridesource trip-providing programs.
Performance characteristics reported include volume of trips provided, use of mobility devices, rider fare collection experience, rates of no-show and late cancellation and average trip length.

**ADA Complementary Paratransit and ADA-Related Programs**

- **Developmental Disabilities Work Trips** – These are largely subscription, standing-order trips for individuals whose developmental disabilities are such that they cannot use fixed route services. Trips are with recurring schedules to a defined group of programs, such as ARC and Goodwill, generally at the same time and same day each week for each participant. These trips are largely provided on weekdays, average about 300 trips daily and do not involve payment of fares. In December, ambulatory riders accounted for 81% and riders using mobility devices were 28%.

  **Performance** – Table 2 shows DD work trips with a 16% early cancel rate, which is not unreasonable for subscription service. Late cancels and no-show trips are 7.7% and this measure warrants attention to bring it below 5% and, ideally, between 2% to 3%. The average trip length is 6.6 miles.

- **Metro ADA Trips** – These are individually requested, casual trips between origin and destination locations throughout the LTD service area. Trips reservations are made from fourteen days in advance and up to the night before the requested travel day. About 275 trips are made each weekday, with Saturday trips averaging 71 and Sundays averaging 77 trips for this December 2017 period examined. Passengers do pay a fare for these trips. For the December period, 66% of passengers paid a fare averaging $2.55 per passenger. Ambulatory riders accounted for 58% of these trips while riders using mobility devices accounted for 42%.

  **Performance** – In Table 2, Metro ADA trips show a 14% early cancel rate which could be considered high, given that these trip reservations are not standing orders but made up to fourteen days in advance and as recently as the day before. However, it is preferable that trips are canceled early rather than late, and are not no-shows. The late cancel and no-show rate of 11.3% is high and represents potentially wasted vehicle resources. The average trip length at 5.2 miles is less than that of the DD work trips or the Pearl Buck Center trips.

- **Pearl Buck Center Trips** – These recurring, standing-order trips are provided to at-risk children enrolled in programs at the Pearl Buck Center. About 35 trips are made daily on weekdays only and no fares are collected. While 100% of these riders are considered ambulatory, these largely preschool-aged children all require car seats which are semi-permanently installed on the several vehicles assigned to the Pearl Buck program service.

  **Performance** – Table 2 reports high early cancel rates, at 53%, which is perhaps a reflection of the at-risk environments of these children. Late cancel and no-show rates are not unreasonable at 4.8%, but potentially could be lower. The average trip length of 6.9 miles is the longest trip distance among the ADA-related programs, possibly reflecting the unique offerings of the Pearl Buck Center to which at-risk young children from around the LTD service area are referred.
Table 2, Performance Measures for Individual RideSource Programs, Based Upon December 2017 Experience

<table>
<thead>
<tr>
<th>RideSource Program Profile Characteristics</th>
<th>ADA Paratransit Related Programs</th>
<th>Medicaid/ Health Related Programs</th>
<th>&quot;Other&quot; RideSource Programs</th>
<th>Total</th>
<th>% of Total Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>DD Work Trips (ADA)</td>
<td>% of Total Trips</td>
<td>Metro ADA</td>
<td>% of Total Trips</td>
<td>Buck Trips (ADA)</td>
<td>% of Total Trips</td>
</tr>
<tr>
<td>RideSource Internal Trips</td>
<td>6,094</td>
<td>99.8%</td>
<td>7,219</td>
<td>99.2%</td>
<td>730</td>
</tr>
<tr>
<td>Other Vendors/ External Providers</td>
<td>15</td>
<td>0.2%</td>
<td>61</td>
<td>0.8%</td>
<td>0</td>
</tr>
<tr>
<td>Total Trips</td>
<td>6,109</td>
<td>100.0%</td>
<td>7,280</td>
<td>100.0%</td>
<td>730</td>
</tr>
<tr>
<td>Total Weekday Trips</td>
<td>6,084</td>
<td>99.6%</td>
<td>7,212</td>
<td>79.6%</td>
<td>730</td>
</tr>
<tr>
<td>Total Saturday Trips</td>
<td>20</td>
<td>0.3%</td>
<td>714</td>
<td>9.8%</td>
<td>0</td>
</tr>
<tr>
<td>Average Weekday Trips (21 Days)</td>
<td>289.7</td>
<td>per day</td>
<td>275.9</td>
<td>per day</td>
<td>34.8</td>
</tr>
<tr>
<td>Average Saturday Trips (10 Days)</td>
<td>2.0</td>
<td>per day</td>
<td>71.4</td>
<td>per day</td>
<td>0.0</td>
</tr>
<tr>
<td>Average Sunday Trips (10 Days)</td>
<td>0.5</td>
<td>per day</td>
<td>77.3</td>
<td>per day</td>
<td>0.0</td>
</tr>
<tr>
<td>Early Cancels</td>
<td>1,015</td>
<td>16.6%</td>
<td>1,040</td>
<td>14.3%</td>
<td>389</td>
</tr>
<tr>
<td>Late Cancel/No Shows</td>
<td>472</td>
<td>7.7%</td>
<td>826</td>
<td>11.3%</td>
<td>35</td>
</tr>
<tr>
<td>Average Trip Length</td>
<td>6.6</td>
<td>mi.</td>
<td>5.2</td>
<td>mi.</td>
<td>6.9</td>
</tr>
<tr>
<td>Ambulatory</td>
<td>4,927</td>
<td>80.7%</td>
<td>4,204</td>
<td>70.7%</td>
<td>730</td>
</tr>
<tr>
<td>Mobility Device</td>
<td>1,722</td>
<td>28.2%</td>
<td>3,076</td>
<td>42.3%</td>
<td>124</td>
</tr>
<tr>
<td>Secured/Stretcher</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
</tr>
<tr>
<td>Total Fare Collected</td>
<td>$111.50</td>
<td></td>
<td>$18,884.10</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td># of Fare Collection Trips</td>
<td>29</td>
<td>0.5%</td>
<td>4,804</td>
<td>66.0%</td>
<td>0</td>
</tr>
</tbody>
</table>
• **Shopper Shuttle Trips** – Open to ADA certified riders only, this is a shopper service that is neighborhood-based and provides trips to and from local grocery stores. A published schedule serves five areas of Eugene with defined grocery stores within each area. The program has been undergoing “refurbishment” with a new schedule developed in January 2018, after the period when this dataset was collected. Riders pay a fare, with 37% of the 521 riders paying an average fare of $2.02. Three-quarters of the riders (76%) are ambulatory and 24% require mobility devices.

Performance – Table 2 shows early cancel rates at 15% and late cancel/no-show rates are 4.8%, which are not unreasonable but, potentially, could be lower. The average trip lengths are short at 2.9 miles.

• **Florence ADA Trips** – ADA trips provided in this small coastal community are included here since they are scheduled through RideSource, with a very small number of trips provided annually, perhaps 1,000 or so. About 4 trips are provided on an average weekday, with three-quarters (74%) of these trips provided to ambulatory persons and 26% provided to persons using mobility devices.

Performance – Table 2 shows early cancel rates are 7% and no-shows at 4.7%. Average trip lengths are short, at 2.3 miles per trip.

**Health and Medicaid-Related Programs**

• **Oregon Health Plan Trips** – This is the largest program for the brokering of authorized trips to providers to connect riders with local and regional medical facilities. Reimbursed by the State of Oregon with federal and state Medicaid funds, an average of 1,170 trips (85%) are provided each weekday with much smaller average numbers of trips provided on weekend days: 135 trips (15%) on Saturdays and 66 trips (5%) on Sundays during December 2017. No passenger fares are paid.

Performance – Table 2 shows a 7.6% early cancel rate and a high 12.2% late cancel and no-show rate, potentially something to be addressed. Average trip length of 17.6 miles is almost three times that of most ADA trips and presumably reflects the regional nature of many medical facilities, at considerable distances from riders’ homes.

• **Medicaid Waiver Trips** – This program involves various tiers of service that reflect the level of trip benefit allocated to each individual. Trips might not be as specifically medical but serve to support a healthy lifestyle for eligible individuals and “keep them connected to their community.” No passenger fares are paid.

Performance – Table 2 shows a 9% early cancel rate and a high 14.5% late cancel and no-show rate. Trip lengths are long at 19.1 average miles per trip.

• **Crucial Connections** – Table 2 shows this as a very small program, with just 4 trips reported during December 2017. It helps to provide long-distance trips, for example to Portland, reflected in the average trip length of 122 miles. No fares are collected.
• **Veterans Transportation** – RideSource helps to connect veterans needing trips with available volunteers and other providers for short or long trips. Also a small program, Table 2 reports just 17 trips were provided during December 2017. Trip lengths for this group of trips were comparatively short, averaging 9.4 miles. About a third of requested trips (29%) were late cancels or no-shows. No fares are collected.

• **Volunteer Transportation** – A modest volunteer program is supported through the Customer and Specialized Services Department, providing 40 trips during December 2017, as reported in Table 2. These are largely local trips with very short lengths averaging 4.7 miles each. Five passengers did pay a fare, presumably a mileage or gas contribution to their driver.

**RideSource Brokered Trips by Time of Day and On-Time Performance**

Total RideSource brokerage trips (including internal fleet) are presented in Figure 17 to contrast the time that trips are requested to the times at which they are scheduled. In general, trips are scheduled at the time a customer requests with many of the requested and scheduled peaks happening at :15 after the hour. A total data set of 50,212 trip records were included in this analysis.

![All RideSource Brokerage Trips by Time of Day](image)

Considering just the internal fleet experience, Figures 18 and 19 show the time requested by the customer, the scheduled time and the actual time the vehicle arrived for the pick-up. Requested trips and scheduled trips are nearly identical suggesting that very few scheduled pick-up times are being negotiated at the time of booking. However, the orange line in both charts representing actual pick-up times shows a “flattening” of trip demand by serving trips either before or after the scheduled pick-up time. This suggests that dispatchers work to manage demand by negotiating trip pick-up times somewhat off the peak-requested demand periods.

The internal fleet December experience represents 11,183 facilitated trips after the removal of cancelled trips from the data set, presented in Figures 18 and 19.
Figure 18

Figure 19

Figure 20 better displays this “flattening” effect around peak travel demand times, suggesting that the scheduling software and call taker processes in fact negotiate trip times with customers to spread demand across peak time request periods. For example, 8:30 a.m. is the highest peak request time while original actual times on either side of this, at 8:15 and 8:45 show actual trip pick-ups well above the requested times for each period. This practice of shifting trips to lower demand periods improves the productivity of the internal vehicle fleet. There are generally about 40 vehicles in service during...
these morning peak periods and somewhat fewer in the afternoon when the peak is not so concentrated but spread across several hours.

Figure 20

On-time performance of the internal RideSource fleet is presented in Table 3. A total of 190 records lacked data for actual pick-up time, thereby reducing the “n” of trips for analysis to 10,813 December 2017 trips. From this sample, 67% of internal fleet trips were provided within the 30 minute on-time window, which is 15 minutes before and 15 minutes after the promised pick-up time.

Table 3, On-Time Performance, Internal Fleet Only – December 2017 Experience

<table>
<thead>
<tr>
<th>On-Time Performance</th>
<th>Count of Trips</th>
<th>% Of All Trips</th>
<th>% by Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Earlier than 1 hour</td>
<td>104</td>
<td>1.0%</td>
<td></td>
</tr>
<tr>
<td>Early 0:46 - 1:00</td>
<td>171</td>
<td>1.6%</td>
<td>17%</td>
</tr>
<tr>
<td>Early 0:31 - 0:45</td>
<td>459</td>
<td>4.2%</td>
<td></td>
</tr>
<tr>
<td>Early 0:16 - 0:30</td>
<td>1,139</td>
<td>10.5%</td>
<td></td>
</tr>
<tr>
<td><strong>Within the Window, Before 0:01 - 0:15</strong></td>
<td><strong>2,619</strong></td>
<td><strong>24.2%</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Within the Window, At 0:00</strong></td>
<td><strong>312</strong></td>
<td><strong>2.9%</strong></td>
<td><strong>67%</strong></td>
</tr>
<tr>
<td><strong>Within the Window, After 0:01 - 0:15</strong></td>
<td><strong>4,285</strong></td>
<td><strong>39.6%</strong></td>
<td></td>
</tr>
<tr>
<td>Late 0:16 - 0:30</td>
<td>1,394</td>
<td>12.9%</td>
<td></td>
</tr>
<tr>
<td>Late 0:31 - 0:45</td>
<td>215</td>
<td>2.0%</td>
<td></td>
</tr>
<tr>
<td>Late 0:46 - 1:00</td>
<td>75</td>
<td>0.7%</td>
<td></td>
</tr>
<tr>
<td>Later than 1 hour</td>
<td>40</td>
<td>0.4%</td>
<td></td>
</tr>
<tr>
<td><strong>Total Trips Analyzed in Sample</strong></td>
<td><strong>10,813</strong></td>
<td><strong>100%</strong></td>
<td></td>
</tr>
</tbody>
</table>
Distribution of RideSource Brokered Trips

Trip origins for this same December 2017 data set were mapped to understand where trips are provided. The following maps depict in overview and at a more detailed level two groups of trips:

1. Traditional ADA trips, those that are provided to ADA certified riders and largely on the internal fleet; and
2. Trips served by other providers on the external fleet and largely health-related.

Figure 20

Figures 20 depicts the ADA-related trip locations, with 96% of the 15,108 trips plotted serving locations within the ¾ mile ADA envelope containing LTD fixed-route services. Trips are most heavily concentrated within the greater Eugene and Springfield area. This distribution pattern is consistent with the 5.2-mile Metro ADA average trip length. The largest number of trips outside the ¾ mile boundary are in the area north and west of Eugene in the area west of Highway 99.

Figures 22 and 23 present the external provider trips, which are largely but not exclusively, health care related. These 29,162 trips are much more widely distributed with pick-up locations in Portland, Salem, Corvallis and within the greater Eugene and Springfield areas but stretching as far east as McKenzie Bridge and west to Florence and Dune City, to the southwest to Coos Bay and to the southeast to Oakridge. Trips provided within the ¾ mile LTD fixed-route envelope are 84%, while 16% are distributed...
across eastern Oregon in locations beyond that. This is consistent with the 19.1-mile average trip length for this group of trips.

Also of interest are the specific destinations to which RideSource riders most frequently travel. High-volume destinations within greater Eugene / Springfield to which there are an average of 500 or more trip requests monthly include: Peace Health, the Integrated Health Clinic, Lane County Health & Human Services and Lane County Mental Health Services. These were among the largest trip-generators, presumably with many served by external fleet, taxi-based operators. The Pearl Buck Center, St. Vincent de Paul and ARC of Lane County receive many traditional ADA trips and are largely served by the internal fleet.

Figure 22
Figure 23

Passenger Pick-Up Locations By Other Providers (29,162)
4. Selected RideSource Policies and Procedures that Impact Service Efficiency and Service Effectiveness

Assessment of Rider Eligibility for RideSource Brokered Trips

The RideSource integrated specialized transportation brokerage has as its foundation an assessment program that determines an individual’s travel capabilities and needs and then identifies the one or more transportation programs for which they could be eligible. Unlike some transit agencies who require individuals to come to an interview or to an assessment facility, LTD determines eligibility through a residence-based assessment where LTD’s contractors make every effort to visit the individual in their home environment to more accurately assess mobility needs and constraints. Another unique feature is that there is no paper application, only a phone call that initiates the assessment process.

The assessment program is administered by staff in LTD’s Customer and Specialized Services Department and is carried out by three agencies and organizations under contract to LTD:

- **Lane Council of Governments, Senior and Disability Services (S&DS):** within the Metro area, S&DS carries out all assessments. Outside the Metro area, S&DS conducts the assessments of all individuals over 45 years of age other than those with developmental disabilities and identified as having mental health issues;
- **Alternative Work Concepts:** conducts the assessments of individuals with developmental disabilities and those younger than 45 years within the Metro area; and
- **White Bird Clinic:** conducts the assessments of individuals identified as having behavioral health needs.

The assessment process begins with an individual seeking transportation services calling the 211 community information and referral services phone number, calling or visiting the LTD Customer Service Center, calling or visiting the LCOG Aging and Disability Resource Center, or directly calling the RideSource call center. When an individual clearly needs to have their travel capabilities assessed, they will be referred to the RideSource Call Center, which will make contact with the individual to obtain basic information and then refer them to the appropriate assessment agency for their residence location and disability status.

At each assessment agency, transportation coordinators are provided with a listing of individuals to be assessed organized by ZIP code. For the LCOG Senior and Disability Services, the ZIP code designates whether the assessment will be carried out by staff in one of 5 satellite offices or the main office in Eugene. The transportation coordinator initiates the process by telephoning the individual to introduce themselves and schedule the assessment at the individual’s residence, although they may also be conducted at an alternate site such as the LTD offices, a public location or even a McDonalds. Conducting the assessment at the individual’s residence allows the coordinator to assess the accessibility of the home as well as to identify and assess the closest bus stop and the path of travel to that stop.

The assessment itself is based on assessment tools developed nationally by Easter Seals Project Action. This protocol assesses the individual’s physical capabilities, cognitive skills related to travel, and barriers to using a public transit bus. Each assessment takes from 20 to 60 minutes and results in a determination of whether the individual is ADA paratransit eligible and, if so, whether they are given full eligibility, conditional (and what conditions), or temporarily eligible. The individual may also be determined to be eligible for Medicaid non-emergency medical transportation or non-medical
transportation, whether they require an escort and other service restrictions. Importantly, the transportation coordinators, because of their agencies’ other responsibilities, are also able to sign individuals up for other needed services, such as Meal on Wheels, counseling and senior companions.

Once an assessment is completed, the transportation coordinator enters the individual’s information and assessment results into the Transportation Assessment Management System (TAMS). This results are then reviewed by staff of the Customer and Specialized Services Department. Once approved, RideSource issues eligibility letters thru the TAMS and the client’s data is entered into the NOVUS database. It should be noted that the TAMS system tracks the timeline of the application and assessment process to ensure that it complies with the 21-day processing requirement stated in the ADA.

The volume of assessment varies widely from month-to-month as shown in Table 4.

Table 4, RideSource Assessments – Two Month Experience

<table>
<thead>
<tr>
<th></th>
<th>December 2017</th>
<th>January 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># Assessments Completed</td>
<td>Cost</td>
</tr>
<tr>
<td>White Bird Clinic</td>
<td>2</td>
<td>$96.00</td>
</tr>
<tr>
<td>Alternative Work Concepts</td>
<td>20</td>
<td>$3,570.00</td>
</tr>
<tr>
<td>LCOG/ Senior &amp; Disability Services</td>
<td>151</td>
<td>$13,819.00</td>
</tr>
<tr>
<td>Monthly Totals/Averages</td>
<td>173</td>
<td>$17,358.77</td>
</tr>
</tbody>
</table>

Securing a Trip

LTD envisioned the RideSource brokerage as an integrated, one-call capability can link Lane County residents with the most appropriate transportation service that would serve their individualized needs. The preceding section described the assessment process that is the first step in securing trips through RideSource. Figure 24 graphically depicts multiple processes that confront an individual who needs a trip. There are various steps between needing a ride, being referred for an eligibility assessment, then referred either to travel training and the RideSource LTD bus pass purchase program or to then call to book a trip for provision of that trip on either the internal fleet or via external providers.

From the rider point of view, while this is a complicated process with multiple steps, the mobility management focus of LTD’s Customer and Specialized Services Department and their agents seek to minimize confusion for the rider or prospective rider. LTD staff report working to maintain a customer-focus throughout the assessment and the trip reservations processes. Riders participate in advisory bodies to help ensure this focus, including the RideSource Call Center Advisory Committee and the LTD Board of Directors’ Accessible Transportation Committee.
Figure 24, Accessing Trips Through the RideSource Brokerage

Process for Customer Seeking Transportation

1. **Resident Needs a Ride**
   - Where to call?
2. **RideSource Eligibility**
   - Home Assessment
3. **Rider Calls Brokerage to Book Trip**
4. **Support Fixed Route Use**
   - RideSource Travel
   - Training/Travel Hosts
5. **LTD Bus Pass Purchased**
6. **External Funding Partners:**
   - Medicaid, Oregon Health Plan, Trillium/Centene, Veterans and other Specialized Funding Sources
7. **530,000 Demand Response Trips thru RideSource Brokerage FY 17/18**
8. **72,000 RideSource Enabled Fixed Route Trips FY 17/18**
9. **211 LTD Customer Service**
10. **Ride Source Call Center**
11. **Provided Transit Information**
12. **OR**
13. **Referred for Travel Assessment**
14. **Provide Demand Response Trip**
15. **LTD Internal Fleet (MTM)**
16. **External Transportation Providers**
Call Taking, Trip Reservations and Trip Scheduling

MTM’s call-taking staff of between 20 to 29 positions, termed Customer Service Representatives (CSRs), handle about 200 hourly calls during peak periods and about 130 calls per hour during the low periods for an average of 1,300 calls per day.

When riders call-in, CSRs open the client screen to identify with whom they are speaking and the programs for which that individual is eligible. This opportunity is a fundamental RideSource characteristic that is unusual among public transit operators, in that riders are often eligible for trips under more than one program. CSRs assign trips accordingly, to the internal or external fleets, based upon the basic trip information provided by the caller and the individual’s profile.

Callers are asked, “When do you need to be there by?” For ADA-related trips, CSRs schedule trips in relation to the requested drop-off time. Riders are given a promised pick-up time and told to be ready between 15 minutes before and 15 minutes after the promised pick-up time. Trips picked up within that thirty-minute window are considered to be on-time.

Call takers do live scheduling of trips, directly onto scheduling templates, for the internal fleet trips – the ADA and ADA-related programs. This enables them to manage demand, that “flattening” effect previously described in relation to the scheduling of trip pick-up times. MTM management estimates that between 65% to 75% of ADA trips are subscription, standing order trips and the balance are causal, non-recurring trip requests.

Non-emergency medical trips, those generally funded by the Medicaid programs, are not scheduled live but are transmitted to external providers for off-line trip scheduling. These trips are often not shared-ride trips.

Effort is made to schedule shared-ride trips as much as possible, to promote higher productivities. The internal fleet vehicles are handling about 600 one-way trips daily and, according to MTM managers, about 400 trips of these are subscription, standing-order trips with the remaining 150 to 200 being casual, non-recurring ride requests. It is easier to create shared-rides among the subscription, standing-order trips but not impossible to discover shared-ride scheduling opportunities among casual trips.

Related to increasing the number of shared-rides, MTM productivity goals had been about 1.2 passengers per hour but supervisors seek generally to move productivity upwards towards 1.6 or 1.7 passengers per hour on the internal fleet, over the next year or more. It should be noted that MTM is reimbursed on a per-trip basis so the productivity levels of the internal fleet do not directly impact LTD costs. However, as productivity is a key cost lever and even a couple of tenths improvement can have an impact on costs, it is important for LTD to monitor the internal fleet productivity that its contractor is achieving.

Ending the Standing Will-Call Return Procedure

While there were numerous procedures that were tweaked or modified with the advent of the new MTM contract in mid-2017, the major structural change was to do away with “will call return” trips. Reportedly an estimated 90% of calls had a “will call return,” meaning that the return trip was only scheduled when the rider called in to report they were ready for their trip home. Now almost none are “will call” trips. The former practice required maintaining a group of drivers and vehicles on stand-by to meet these essentially on-demand trips. which limited the ability to group return trips and to realize improved productivities.
Riders are now asked “Please estimate the time you need for your appointment. If you need to come home sooner than that, you can call RideSource and we may be able to send a vehicle earlier.”

It was reported by external providers that the implementation of this policy was more problematic for the external fleet vehicles. When the passenger is not ready to go at the scheduled time, these drivers do not get paid when the passenger cannot be transported, though the driver has arrived at the pick-up location at the originally scheduled time.

**Reasonable Modification Procedures**

No later than July 13, 2015, all public entities that provide public transportation were required to make reasonable modifications in policies, practices, or procedures when the modifications are necessary to avoid discrimination on the basis of disability or to provide program accessibility to their services, to have a process in operation to inform the public about how to request such a modification, and to respond to such requests when received. [Federal Register/ Vol.80, No.49/Friday, March 13, 2015, pp.13260-13263]

Information regarding LTD’s Reasonable Modification Policy, how to request a modification and how to obtain more information about this policy or ask a question is readily available on the LTD website by clicking on the “Accessibility Info” tab and then “Reasonable Modification Policy.”

Discussions with the Customer and Specialized Services staff who are responsible for administering Reasonable Modification requests for the agency in general and for the RideSource program disclosed that the District has received very few such requests in advance of an individual’s actual transit trip and that there is no feedback mechanism to record requests made at the time of travel and how they were accommodated.

In responding to a recent national survey on ad hoc Reasonable Modification requests – that is, requests made at the time of travel – LTD staff noted that there is presently no tracking of such requests, but that training is being done with operating staff on handing ad hoc requests without a big process. For example, LTD has a policy of not allowing the consumption of food or beverages on-board its vehicles, but, if a request is made to allow food or beverages due to a disability, the driver should be reasonable in allowing such a request rather than create a lot more work. Staff made the point that the operational objective is to provide client service.

**Supervision for Internal and External Fleet Operations**

Under its General Manager, MTM has an Operations Manager and supervisory driver/ dispatch positions plus a call taker supervisor on duty during most weekday operating hours, in addition to weekend coverage. During the initial transition period, monthly safety meetings were converted to discussions of new procedures, for example reviewing the policy of terminating across-the-board will call returns. Drivers expressed the desire to return to regular safety meeting formats, for example to discuss concerns about driving safety near U of O neighborhoods, Pioneer Parkway in Springfield, Highway 99 from Roosevelt to Royal in West Eugene, and the Delta interchange.

External fleet supervision had fallen to a minimal level during the time of the consultants’ site visit in mid-March 2018, and, presumably, this is also a consequence of the complexity of the software and contract transitions. Some external fleet supervision is “outsourced” with former LTD drivers playing a role in vehicle operations monitoring and vehicle / driver inspections. This seems generally advantageous but the supervisors encountered requested more training by MTM in their monitoring functions.
Communicating with Riders

Tools to communicate with riders and prospective riders of RideSource services are discussed here, as well as opportunities by which to improve the effectiveness of these avenues of communication.

RideSource Website Presence

RideSource has a prominent place on the LTD website, through the “Accessibility” tab, one of five at the top of the LTD home page and via the “Fares and Passes” tab and the On-Line store to purchase RideSource Ticket Books.

Information on the Accessibility tab is, however, text-heavy and doesn’t readily convey to riders or prospective riders what types of transport and mobility options might be available to seniors, to persons with disabilities, to those with temporary incapacitating conditions, among others (Figure 25). A telephone number is provided to initiate the process of applying for a RideSource transportation assessment. Some additional RideSource information is provided via the Ticket Book purchase option, under the Fare tab.

New or prospective users cannot take next steps in the assessment process via any on-line mechanism, for example a “Contact Us” tab could be a useful way to ask early questions about RideSource services.

LTD staff are actively exploring a Riders’ Portal where current riders can go to check the estimated time of arrival of their vehicle and to confirm what vehicle / provider is serving the trip so that they know what vehicle to be looking for. A rider portal could be used to cancel trips, although rider education – possibly consequences or incentives – could encourage more “early” cancels and fewer “late” cancels.

Improving web-based information is recommended for two audiences: prospective users and for existing users.

Ride Guides

LTD has at least three riders’ guides in existence: 1) the ADA RideGuide, 2) for Medicaid trips and 3) for Medicaid Mileage Reimbursement. None yet reflect the new polices and changes in procedures to which riders are expected to adhere now under MTM operations management.
Consideration should be given both to revising and enhancing these various rider guidelines, but also to providing a web link to printable documents and at appropriate location(s) on LTD’s website. As more and more persons – of all ages – embrace the Internet as a primary source of information, it is important that RideSource uses this as an opportunity for locating important information. For example, policies on no-shows and late cancels impact overall efficiency and cost-effectiveness, but, importantly, the quality of everyone’s ride experience is affected when drivers have to travel to locations where no rider boards. Putting important polices in prominent places, as the Reasonable Modification policy currently is, benefits both the rider and the efficient operation of the service.

Using the Telephone Wait Time to Communicate with Riders

A low-cost, no-cost strategy for improved communications was suggested by a RideSource Technical Advisory Committee member, namely to use the hold-time to provide current, recorded messages to riders about policies. During the fall and winter of 2017/2018 when hold times have been longer than usual, this on-hold time could include looped messages to riders about new policies. For example, the revised policy on will-call returns could have been described there. The customer advocate noted that it is important that messages be changed on a regular basis and not kept interminably. And, equally important, is to find the right tone in communicating rider policies in this recurring loop, as it could otherwise be distressing.

Shopper Shuttle

An efficient and proven service of the RideSource program is its shopper shuttle which seeks to provide transportation directly to and from local grocery stores for ADA eligible riders. The Shopper Shuttle rotates services through the greater Springfield/ Eugene area serving a new neighborhood each weekday and, on those days, several grocery stores within reasonable distances of that neighborhood, shown in Figures 26 and 27.

The Shopper Shuttle fare of $2 is considerably less than the $3.50 ADA fare, providing an important incentive to take this shopping trip option on the day when it serves the local neighborhood.
Drivers provide some limited assistance to riders in helping them get their groceries loaded onto the vehicle, with its special shelving, and then to the riders’ door.

Figure 27, Shopper Shuttle Areas Served, Jan. 2018

As this program was undergoing restructuring at the time of the consultants’ March 2018 site visit, current operational information was not available. However, December 2017 service data – before this restructuring – indicated that 514 Shopper Shuttle trips were made that month, with an average trip length of 2.9 miles, reflecting the local nature of these trips. December fares were reportedly collected from just 36% of these Shopper Shuttle riders. December trip experience suggests that on average, there are about 25 one-way trips or perhaps 12 persons using the Shopper Shuttle each weekday. For a service in operation just a few hours each day, this also suggests productivities well above the 1.2 to 1.5 trips per hour of general internal fleet service.

Figure 26, Interior of the Shopper Shuttle Vehicle Showing Storage Areas for Grocery Bags

Complaints and Complaint Management

An important module of the new TripSpark software is related to complaints and is designed to receive, catalog and monitor complaints and their resolution. The Customer and Specialized Services Department staff are easily able to review and monitor progress on complaint resolution through Trip Spark, by day or by month or by category of complaint.

Given the considerable disruption to the service of transitioning to a new contractor almost simultaneously with installing a new call taking-trip dispatching system, the current complaint logs were not carefully examined. Complaint monitoring will be an important way to monitor the rider experience of trips brokered through RideSource, both to internal and external fleet providers. The RideSource Technical Advisory Committee can play an important role in tracking trends in complaints as the new systems and processes become more routinized.
5. LTD’s Significant RideSource Investment in Facilities and Equipment

LTD has invested significantly in having a turn-key operation, which includes the ownership of the internal fleet vehicles, the operations facility, the hardware and software necessary for the contractor to operate and manage the RideSource program. The subsection highlights these significant resources.

**LTD Facilities at 240 Garfield Street, Eugene**

LTD contracted for a purpose-built maintenance and operations facility, constructed in 2004 to house the RideSource call center, fleet dispatch, a 3,300 square foot shop with lift, specialized vehicle maintenance equipment and four bays. The 2.6-acre lot includes fleet and staff vehicle parking.

All vehicle maintenance is performed on-site except for major body work and some select engine overhaul work. Maintenance staff of 3 FTEs includes one maintenance supervisor.

Since they are owned by LTD, the RideSource facility is maintained by LTD staff. The consultants encountered the feeling that the RideSource facility may not have the same priority as other LTD facilities. There was no means of validating this impression.

**Sophisticated Call Taking, Scheduling and Dispatch Software**

The RideSource brokerage is made possible by sophisticated, integrated software that enables the dispatching of trips (and passengers) supported by different funding streams to the same vehicle but appropriately charged to different payors. SMS operated a legacy, DOS-based program that accomplished this since RideSource began operations in 2008.

**New Software Challenges With TripSpark**

During FY 2016/2017, LTD sought and secured a new web-based operating platform through the Novus product TripSpark. Use of the software commenced on July 1, 2017, during the last three months of the SMS contract. Notably, staff report that this was three-months earlier than the Novus contractor proposed to start operations, time that would otherwise have allowed for refinement and additional coding of the software to accurately reflect the RideSource operating environment. LTD management staff opted for an earlier start date with the new TripSpark software, proposing a phase-in of various modules. The logic was that the software would commence in advance of the new management operations contract so that not everything about the RideSource environment would be changed at the same time.

There were several down-sides to this decision. One, some SMS supervisors and staff were not well-motivated to learn a new software program that is complex and operates very differently from the old, R-Base legacy program. Secondly, the training provided by NOVUS during installation was provided to some staff who were not ultimately retained by the MTM management, so this early training opportunity was lost. Current line supervisors and dispatch staff spoke of receiving minimal training in TripSpark and told to “figure it out.” Finally, the TripSpark product was not initially up to the
complexities of the RideSource environment with the result that the software crashed multiple times a day. These crashes wiped the tablets of drivers in the field and required the software to be “rebooted,” a procedure that often took as much as thirty minutes or more, during which the driver simply had to wait in place for their tablet to refresh with their trip manifest. Obviously, this impacted on-time performance of the internal fleet vehicles.

As recently as the March 2018 visit by the consultant team, these crashes were a common occurrence. However, a significant effort by the Novus TripSpark developers, in collaboration with the Customer and Specialized Services staff and MTM staff, eventually resolved the software problems. By early June 2018, crashes were no longer in evidence and the software appears to be running smoothly with Version 4.2.12.5 now in place. This incorporates numerous patches and corrections made over the nine months since the July 2017 initial installation.

**Reporting Modules and Expertise**

Both LTD staff and MTM supervisors spoke of their then-current reporting difficulties because the Crystal reports module was not part of the original software agreement with Trapeze/Novus for the TripSpark product. This presented at least two issues. For the contractor, who did have in-house expertise in using Crystal reports, it was very difficult to extract certain monitoring reports related to daily operations, specifically to monitor internal fleet productivity in order to make adjustments in trip dispatching procedures. And, for LTD’s Customer and Specialized Services Department staff, the absence of the Business Intelligence Analyst position (a then-vacant position) made it difficult to obtain reports that enabled LTD to independently monitor and report on its new contract operations.

Demand response services are data heavy in a program the size and complexity of the RideSource brokerage and the need for IT expertise is very real. For example, understanding trip demand in terms of wheelchair, ambulatory and stretcher requests is something not reportedly available but with important implications for efficient vehicle dispatching. Staff reported the need for an operational “dashboard” capability to provide performance reporting that enables a look at each vehicle tour to identify productivity opportunities. Making small improvements in productivity through effective dispatching can result in potential cost reductions.

When trip demand patterns are well understood, driver shifts and scheduling of vehicle tours can be modified to match demand. This can result in fewer vehicle revenue hours to provide the same or more trips but requires careful and continuing attention to customer demand for trips in relation to the contractor’s provision of service.

**LTD Partnering to Invest in New Centene Software Reporting Requirements**

A final area associated with the TripSpark software relates to new reporting requirements that Centene is levying on all of its providers, including RideSource. These requirements add additional fields to each trip record, essentially tying considerable rider (patient) centered data to the individual trip-record. At the time of the March 2018 site visit, discussions had not commenced as to how to accommodate new Centene data requirements. MTM staff believes the required data items are “mostly there” and that what is needed is organizational / IT attention to pull and report information to Centene’s satisfaction.

Major RideSource contractors, for example Oregon Taxi, who do significant business through RideSource in providing Medicaid-funded trips, are among those who are very interested in addressing and satisfactorily resolving these new reporting requirements. LTD staff can have important partners in taking on resolution of this reporting issue, in that all parties – including Centene – will benefit by the
continued operation of RideSource as an integrated brokerage that can provide cost-effective trips for its numerous partners.

**RideSource Internal Fleet**

Table 5 presents LTD’s revenue vehicles for its internal fleet of its Demand Response Program. The list reports information from LTD’s overall vehicle inventory queried on February 2018. All listed vehicles are operated by MTM, specifically for RideSource. Currently, the fleet is comprised of two (2) vehicle types, including twelve (12) vehicle models with a total active fleet of 54 vehicles. The report indicates the individual vehicle condition, mileage, and vehicle replacement year, all of which provide LTD with information necessary to develop and maintain its vehicle replacement schedule.

Staff reports that there are often 42 vehicles in peak service. Many vehicles with a manufacture year of between 2005 to 2009 (except for the Eldorado van) exceed the replacement year and useful life and this will require attention over the next several years to ensure optimal operating conditions.

LTD operates a combination of 4 to 5-passenger vans and mid-size cutaway vehicles that can seat 14-20 passengers. Operating more than one vehicle type can decrease operational efficiencies by providing lower capacity service for the same level of operating costs associated with operator salaries and the addition of maintaining different vehicle types. However, in certain operating environments, having a mix of vehicles may be necessary to address operational issues. In the case of LTD, a mix of vehicles is reported as necessary for situations in which a larger cutaway vehicle cannot maneuver into and out of certain destinations. While this is an acceptable justification, the agency could identify these potential problem areas and ascertain if opportunities exist to improve these locations, thereby improving customer experience and LTD’s operational efficiency.

Most vehicles are equipped with I-Drive and a 5-camera surveillance system. Drivers, upon going into service, check-out tablets to receive and report TripSpark dispatched trips during their driving shifts.

Table 5, RideSource Internal Fleet Characteristics

<table>
<thead>
<tr>
<th>Vehicle Type</th>
<th>Total Fleet Vehicle</th>
<th>Year</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Vehicle Length (in feet)</th>
<th>Seating Capacity</th>
<th>Average Odometer Reading</th>
<th>Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category C Medium-size, medium duty bus</td>
<td>1</td>
<td>2005</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>24</td>
<td>14-4</td>
<td>291,646</td>
<td>Marginal</td>
</tr>
<tr>
<td>Category C Medium-size, medium duty bus</td>
<td>11</td>
<td>2007</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>24</td>
<td>14-4</td>
<td>264,239</td>
<td>Marginal - Poor</td>
</tr>
<tr>
<td>Category C Medium-size, medium duty bus</td>
<td>8</td>
<td>2009</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>24</td>
<td>13-4</td>
<td>199,814</td>
<td>Adequate - Marginal</td>
</tr>
<tr>
<td>Van</td>
<td>1</td>
<td>2009</td>
<td>Eldorado</td>
<td>13-4</td>
<td>15</td>
<td>14-4</td>
<td>50,841</td>
<td>Excellent</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>12</td>
<td>2010</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>24</td>
<td>reported in ACES</td>
<td>182,812</td>
<td>Excellent</td>
</tr>
<tr>
<td>Van</td>
<td>1</td>
<td>2011</td>
<td>Dodge</td>
<td>Caravan - Braun</td>
<td>15</td>
<td>reported in ACES</td>
<td>80,262</td>
<td>Excellent</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>6</td>
<td>2011</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>24</td>
<td>reported in ACES</td>
<td>139,211</td>
<td>Good</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>1</td>
<td>2013</td>
<td>Eldorado</td>
<td>E450</td>
<td>26</td>
<td>reported in ACES</td>
<td>72,383</td>
<td>Excellent</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>1</td>
<td>2013</td>
<td>Eldorado</td>
<td>240/Ford Chassis</td>
<td>26</td>
<td>reported in ACES</td>
<td>72,246</td>
<td>Excellent</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>1</td>
<td>2013</td>
<td>Eldorado</td>
<td>E450</td>
<td>26</td>
<td>reported in ACES</td>
<td>45,777</td>
<td>Excellent</td>
</tr>
<tr>
<td>Cutaway *</td>
<td>1</td>
<td>2013</td>
<td>Chevy</td>
<td>Spirit of Mobility</td>
<td>26</td>
<td>reported in ACES</td>
<td>25,542</td>
<td>Excellent</td>
</tr>
<tr>
<td>Van</td>
<td>3</td>
<td>2013</td>
<td>Dodge</td>
<td>Caravan - Braun</td>
<td>15</td>
<td>reported in ACES</td>
<td>46,519</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

This subsection reviews three contracts between LTD’s Customer and Accessible Services Department and various providers related to RideSource, to the Rhody Express and the Diamond Express services. Also discussed is the context for a fourth group of contracts, namely those with external providers. Key elements of three contracts are identified and, as relevant, comments are offered.

MTM RideSource Management Agreement

Key elements include:

- **Effective Date:** June 22, 2017
- **Article 3: Contract Type and Term**
  - Firm Fixed Price Monthly Fee
  - Variable Fixed Rate per Trip
  - Term: fifty (50) months concluding August 31, 2021
  - Options: “…Contractor shall have the option to renew this Contract for three (3) separate terms of two-years each…” [Limitations on potential increases in option year compensation are included in Section 4.4, Price Escalation, of the Scope of Services.]
  - At the termination or expiration, the Contractor agrees to continue providing services for a transitional period of 120 days.
  - “The total possible maximum Contract period shall not exceed ten (10) years and 120 days.”

  **Comments:**
  1. The base term of 50 months from the effective date will be August 22, 2021, not August 31, 2021. This is a small point, but technical.
  2. The Maximum Term of “ten (10) years and 120 days” appears to be off by 2 months: 50 months plus 3, 2-year options would be 10 years and 2 months. Again, this is a small point, but technical.

- **Article 15: Insurance**
  - Commercial General Liability Insurance limits are stated as
    - $2,100,000 for injury of death of a single claimant, and
    - $4,250,000 for injury or death of multiple claimants.
  - Commercial Auto Liability insurance limits are stated as
    - $2,100,000 for injury of death of a single claimant, and
    - $4,250,000 for injury or death of multiple claimants

  **Comments:**
  1. While there may be Oregon State statutes that limit the liability of public agencies, these liability insurance limits are low when compared to those required of contractors in other states. Limits of $10m are common and higher limits are not unusual in larger systems where multiple claims could be experienced.
• Vehicle Lease for Special Transportation Fleet
  o The Vehicle Lease itself does not address the agency’s responsibilities for replacement of RideSource vehicles. In Section 3.1, General Responsibilities of the Selected Contractor of the Scope of Services, the Contractor is required to “…participate in the ordering of new vehicles, preparing new vehicles for service, and preparing retired vehicles for disposition…” however there are no expectations indicated for how often vehicles will be replaced.

Comments:
  1. The agreement with the Contractor should by age or mileage indicate when LTD-supplied vehicles will be scheduled for replacement;
  2. Additionally, consideration should be given to making LTD specifically responsible for the cost of major vehicle components (engine and transmission) when failures are due to excessive mileage due to non-replacement of vehicles.

• Exhibit A, Fully Confirmed Scope of Services. Section 1.2.5 Minimum Service Standards
  o 1.2.5.5 ADA Trip Denials 0.25% of total trips

Comments:
  1. FTA has defined the acceptable level of ADA trip denials as zero. The stated standard appears to be contrary to FTA guidance.

• Exhibit B, Compensation and Method of Payment, Exhibit B-1: Compensation of the management contractor, MTM, is established as follows:
  o Monthly Fixed Fee = $246,651.71 [1/12 of the total annual fixed costs]
  o Fixed Rate Per Trip = $21.64 per trip [Based on a projection of 153,852 annual Internal Fleet trips: Proposed Total Annual Variable Cost of $3,329,364.86 divided by the Year One Fixed Rate per Trip of $21.64 = 153,852 trips]

Comments:
  1. Based on December 2017 RideSource data, 15,054 Internal Trips were operated during that month. If December’s total trips were about average, the Internal Fleet could operate about 180,000 trips annually, which is significantly above the rate used to compute the per trip reimbursement rate. At the higher trip making rate of 180,000 annual trips, the contractor would be paid $3,895,365 during Year 1, or $565,835 over the contracted budget. This presents a contracting dilemma as Exhibit B, Compensation and Method of Payment, Section I, Total Compensation, states a firm, not to exceed total compensation of the Base Term of the contract of $26,239,104.32, which corresponds to the MTM proposal.

  2. It is recommended that LTD assess the use of per trip reimbursement as inappropriate for the developing nature of the RideSource Internal Fleet services. Per trip reimbursement inordinately compensates the system manager as productivity increases, as it should be expected to do under the new manager and operating software.
Rhode Express Operations Contract

Key elements include:

- Agreement is with Kuhn Investments, Inc. dba River City Taxi
  - Original contract was effective July 1, 2013, for a period of one year with the option to annual renewals not to exceed a maximum contract period of 5 years;
  - Contract specified a budget of $166,300.00 for fiscal year 2013-2014, from July 1, 2013 through June 30, 2014, as follows:
    - ADA Curb-to-Curb Service $4,000
    - Rhody Express $158,900
    - Vehicle Preventive Maintenance $3,400
- Change Notice #1 extended the contract for the period July 1, 2014 through June 30, 2015, with a maximum total obligation of $179,200.00;
- Change Notice #2 extended the contract for the period July 1, 2015 through June 30, 2016, with a maximum total obligation of $188,200.00;
- Change Notice #3, extended the contract for the period July 1, 2016 through June 30, 2017, with a maximum total obligation of $194,000.00;
- Contract is currently operating under Change Notice #4, which ends June 30, 2018:
  - Maximum annual payment for operation of Rhody Express fixed route transportation service is $178,000.00;
  - Maximum annual payment for vehicle preventive maintenance is $4,200.00;
  - Maximum annual payment for provision of Rhody Express complementary ADA paratransit service is $10,000.00;
  - Total obligation for Fiscal Year 2017-2018, beginning July 1, 2017, and ending June 30, 2018, is $192,200.00;
- RFP 2013-19, Community Transportation – Rhody Express, Section 1.12, Option to Renew, specifies that “...annual adjustments (will be) based on true and actual costs, Consumer Price Index, and changes in service demand.”

Comments:
The language cited in the final bullet above regarding compensation in option periods is contrary to Federal Procurement policies which requires that the rates of compensation for options periods either be specified in the original contract or limited to an established index such as the CPI. Increases over such an index are not allowed.

Diamond Express and Oakridge Dial-A-Ride Service Contract

Key elements include:

- Agreement is with TAC Transportation, Inc. dba Pacific Crest Bus Lines;
- Period of performance is for nine (9) months, from September 1, 2017 through June 30, 2018;
- Maximum compensation under this contract shall not exceed $170,375.00, as follows:
  - For provision of the Diamond Express intercity shuttle services $163,240.00;
  - For provision of Dial-A-Ride services in Oakridge, Oregon $12,375.00;
- Article 4, Period of Performance (Revised), Section (3) states “The total possible maximum contract period shall not exceed five (5) years.”
RideSource External Provider Contracts

In accordance with the contract terms between LTD and MTM, the external transportation providers are subcontractors to MTM and are directly responsible to MTM in relation to the RideSource program. Specifically, Exhibit A, Fully Conformed Scope of Services, Subsection 1.2.1, states that “Contractor staff ... shall arrange for the service to be provided from a wide pool of modes and subcontracted transportation operators.”

Key elements include:
- A review of MTM’s Medical Transportation Services Agreement, MTM Transportation Provider Handbook, and associated contract appendices found them to be thorough and inclusive of usual and customary contract terms, as would be expected considering the extensive experience of MTM in this medical transportation field;
- A total of 22 individual transportation firms are listed by MTM as External Providers of RideSource trips as of March 27, 2018. These firms provide four specific levels of service depending on the capabilities and trip requirements of the passenger (called “members” under MTM contract terms): ambulatory, wheelchair, secure (stretcher) and long-distance; and
- Review of the current rate structures of the credentialed providers finds a range of flag drop and mileage charges, varying by the level of specialization required in the transport of a particular member (i.e. ambulatory, wheelchair or stretcher), and at the discretion of each provider.

Comments:
1. The second paragraph of Section 15, Term and Termination, of MTM’s Medical Transportation Services Agreement states clearly that “Transportation Provider agrees that this Agreement does not guarantee or ensure Transportation Provider any minimum number of trips, and that actual trip volume may vary.” Based on our interview with external provider representatives, the inability of MTM and/or the RideSource dispatchers to send providers a minimum number of daily trips makes it difficult for particularly smaller providers to ensure the availability of drivers when trip requests are received.

2. At the time of our field investigations in mid-March 2018, it was our understanding that few on-street inspections had been done of the external provider services by MTM’s quality control staff. We note this as being an important aspect of both service oversight and training of the external providers and encourage MTM and LTD to ensure frequent on-street monitoring of RideSource trip performance and interface with external provider staff.

7. Potential New Program Concepts and Topics

Several areas emerged during discussion with staff as potential topics for the future. Three concepts are briefly summarized here.

Policy of “Free” Fares for ADA Riders

There is interest by staff in exploring a policy of free fare on LTD fixed route service for those persons who are ADA paratransit certified. A policy instituted in growing numbers of communities around the
country, this has been shown to be a very cost-effective way of encouraging ADA eligible individuals to use the least expensive transportation option whenever possible. Focus group discussions with ADA riders reveal that riders use this benefit in very discriminating ways, for example, taking the free fare fixed-route trip to a medical service and then coming home on the demand response service when they are depleted by the medical treatment.

TCRP Report 163 Strategy Guide to Enable and Promote the Use of Fixed-Route Transit by People with Disabilities summarized then current ridership and cost information for this policy, concluding that “even if it is assumed that only 25% of the total free fare trips are trips diverted from ADA paratransit, the analysis suggested savings ranging from $8,282 per year for the smallest systems to over $9 million per year for the largest systems.”

Table 6 provides 2013 information as to the scale of difference between potential break-even trip-making levels and the number of free-fare fixed route trips actual reported. While the data is somewhat dated, the range of these differences between the break-even points and actual trips recurred nonetheless has relevance to this discussion.

Table 6, Sample Benefit-Cost “Break-Even” of Free Fare Programs

<table>
<thead>
<tr>
<th>Transit Agency</th>
<th>Net Savings per Diverted Paratransit Trip</th>
<th>Annual Costs (assume 0.5 FTE)</th>
<th>Annual Break-Even Diverted Trips</th>
<th>Actual Annual Free Fare Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ann Arbor TA</td>
<td>$22.77</td>
<td>$45,000</td>
<td>1,976</td>
<td>101,147</td>
</tr>
<tr>
<td>Arlington Transit</td>
<td>$28.56</td>
<td>$50,000</td>
<td>1,751</td>
<td>9,818</td>
</tr>
<tr>
<td>Fort Worth, TX</td>
<td>$29.90</td>
<td>$45,000</td>
<td>1,505</td>
<td>229,690</td>
</tr>
<tr>
<td>Hernando County</td>
<td>$22.63</td>
<td>$35,000</td>
<td>1,547</td>
<td>7,652</td>
</tr>
<tr>
<td>Massachusetts Bay TA</td>
<td>$39.19</td>
<td>$50,000</td>
<td>1,276</td>
<td>942,742</td>
</tr>
<tr>
<td>San Mateo TD</td>
<td>$41.25</td>
<td>$50,000</td>
<td>1,212</td>
<td>244,253</td>
</tr>
<tr>
<td>Utah TA</td>
<td>$34.14</td>
<td>$45,000</td>
<td>1,318</td>
<td>157,625</td>
</tr>
</tbody>
</table>

Note: The column “Annual Costs” reflects the costs of the ½ time position associated with administering a free-fare program within each organization.

**Shopper Shuttle Expanded to the General Public**

The Shopper Shuttle service is cost-effective as it serves short trips on a shared-ride basis. Expanding this to the general public could benefit others, including persons age 65 and older adults who may not consider themselves ADA eligible. Neighborhood level marketing, for example, through local senior centers, could be a way to promote such an expanded service. Furthermore, it could be an important contributor to improved mobility for older adults in need of grocery shopping assistance and support and potentially promoted by the Point2point staff through their various outreach activities.

---

Expanding Shared Ride Potential with Trip-Level Integration of Internal and External Fleets

Another opportunity for improving the effectiveness of RideSource services and their cost-effectiveness lies in more discriminating scheduling of trips between the internal and external RideSource fleets. Presently, virtually all ADA paratransit trips are provided on the internal fleet whereas virtually all the Medicaid/healthcare sponsored trips are provided by the external providers. There is no institutional barrier to the provision of ADA paratransit trips by external providers or Medicaid/healthcare trips on the internal fleet.

Each of these providers – internal and external – has inherent advantages and disadvantages related to transporting the range of trips that present to the RideSource program. The internal RideSource fleet, for example, is better able to transport larger groups and shared-ride trips because of the larger capacity of its lift-equipped, dedicated van fleet. External providers, on the other hand, are more efficient in serving longer distance single-passenger trips and trips that are outside peak periods. Understanding and utilizing these efficiencies in the RideSource trip scheduling process has the potential to provide higher-quality service to RideSource passengers while also making better – and more cost-effective – use of both internal and external resources.