



MetroAccess Ad Hoc Advisory Committee



Best Practices Working Group Final Report and Recommendations

June 15, 2006

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Best Practices Working Group Report

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Introduction

On February, 16, 2006 the Washington Metropolitan Area Transit Authority (WMATA) Board of Directors created an ad hoc committee to review WMATA's MetroAccess (MACS) paratransit service. The Board tasked the committee with recommending improvements for MetroAccess service because of difficulties experienced by customers with the transition to a new service provider.

The ad hoc committee's work was guided by the recommendations for improving MetroAccess service in the study *"Improving Demand Responsive Services for People with Disabilities in the Washington Region"* dated February 15, 2006 and conducted by the Transportation Planning Board (TPB). The study identified shortcomings in existing paratransit services and made recommendations based on innovative practices from around the country.

The ad hoc committee agreed to a general scope of work to review existing WMATA MetroAccess services to develop recommendations for improving service. The committee's scope includes:

- 1) Providing a venue for MetroAccess riders to give input into ways to improve service and incorporate rider recommendations
- 2) Reviewing "Best Practices" for paratransit service and identification of best practices for WMATA to implement
- 3) Developing a program for improving MetroAccess service and responding to recommendations made by the TPB Access For All (AFA) advisory Committee study "Improving Demand Responsive Services for People with Disabilities in the Washington Region"

Pursuant to the ad hoc advisory committee scope, the committee established a team paratransit industry experts and MetroAccess users to complete a review of "best practices" in paratransit services and to address issues raised in the AFA report. The Best Practices sub-committee is chaired by Wendy Klancher, from the Metropolitan Washington Council of Governments. Members of the sub-committee include:

- Dan Dalton, Easter Seals Project ACTION
- Jachebed Jordan, IONA Senior Services
- John Smolenski, MTA Deputy Administrator
- Harold Snider, Montgomery County Commission for People with Disabilities
- Penny Reeder, MetroAccess rider
- Mary Williams, Riders' Advisory Council
- Steve Yaffe, Fastran- Fairfax County
- Carolyn Bellamy, MetroAccess rider
- Elizabeth (Buffy) Ellis, KFH Group
- Christian T. Kent, Director of MetroAccess Services
- Jon Monson, MV Transportation.

The scope of the Best Practices working group included examining industry best practices and policies in paratransit service pertaining to:

- Reservations, scheduling, dispatch and driver/vehicle operations
- Door-to-door v. curb-to-curb service
- No shows and late cancellation policy
- Same day service
- Human service transportation coordination

The Best Practices working group met a total of 7 times from March 21, 2006 through May 15, 2006. Meetings were held on March 21, March 31, April 7, April 17, April 28, May 5 and May 15. Despite the rigorous meeting schedule, all meetings of the Best Practices working group were well attended and each meeting had lively discussion and full participation from all members.

The group utilized a number of facilitation discussion techniques—including group brainstorming sessions and a prioritization exercise for rating recommendations—during meetings to guide the discussions and deliberations. Despite a wide variety of backgrounds among the group members and an abundance of differing view points, group members talked openly throughout the process, and developed solid support for each of the 11 recommendations.

Resources Used to Develop Recommendations

Peer agency surveys, web based information, phone interviews and email were utilized to develop the attached peer review document (Appendix A) outlining the policies and practices of various U.S. transit provider paratransit programs.

The Best Practices Working Group developed comparative information regarding the paratransit services of 14 peer transit agencies, including:

- Maryland Transit Administration (MTA)
- Port Authority Transit, Pittsburgh (PAT)
- Tri-County Metropolitan Transportation District, Portland Oregon (TriMet)
- Metropolitan Transportation Authority, New York (MTA)
- Utah Transit Authority (UTA)
- Chicago Transit Authority (CTA)
- Massachusetts Bay Transportation Authority (MBTA)
- Regional Transit District of Denver (RTD)
- Bay Area Regional Transit, San Francisco (BART)
- King County Metro, Seattle (KC Metro)
- Southeastern Pennsylvania Transit Authority, Philadelphia (SEPTA)
- Transit Authority of River City, Louisville Kentucky (TARC)
- Metropolitan Transit Authority of Harris County, Houston Texas (Metro Houston)
- New Jersey Transit (NJ Transit)

The working group also utilized several expert reports on the issues facing paratransit services including: the Easter Seals Project ACTION brochure on *“Innovative Practices in Paratransit Service”*; the Federal Transit Administration (FTA) Transit Cooperative Research Program (TCRP) survey and report *“Practices in No-Show and Late Cancellation Policies in ADA Paratransit”*; and the National Council on Disability report *“The Current State of Transportation for People with Disabilities in the United States”*.

Furthermore, the *“Improving Demand Responsive Services for People with Disabilities in the Washington Region”* report of February 15, 2006 conducted by the Transportation Planning Board (TPB) informed and guided the scope and deliberations of the Best Practices Working Group.

The team also utilized and relied upon the expertise of Russell Thatcher and Rosemary Mathias of TranSystems, Inc. Russell Thatcher served as the consultant for the TPB Demand Responsive Study.

Finally, the expertise and knowledge of the individual members of the Best Practices Working Group was utilized to develop the recommendations contained within this final report. From the first-hand experiences of the MetroAccess users to the expertise of the paratransit professionals, the Best Practices Working Group recommendations were shaped by the expertise, experiences and ideas of the members of the working group.

Recommendations

The following 11 recommendations from the Best Practices Working Group of the MetroAccess Ad-Hoc Advisory Committee are the culmination of the working groups meetings, discussions, deliberations, research and prioritization efforts. All policy recommendations are noted by italics. Recommendations that have cost implications for WMATA, including recommendations 3, 4, 5 and 7, were discussed at the final meeting Ad Hoc Committee on May 24.

The final set of recommendations from the Best Practices Working Group were broken down by recommended implementation time frame—short-term, mid-term and long-term—and are accompanied by the Best Practices Working Groups agreed upon top three priorities from the full list of recommendations.

Short-Term (Within 2 months)

1. WMATA should improve customer service and communication immediately

A. The MetroAccess program needs a “Customer-First” focus.

- A “Customer-First” focus should be specified in a mission statement, adapted in management strategies, and embedded in personnel training and staff meetings
- Sensitivity training should be provided to reservationists, dispatchers and drivers to provide a better understanding of various mobility needs as well as the psyche of customers with disabilities
- Supervisors should use the telephone system to randomly monitor reservationists’ and dispatchers’ Customer First focus

- B. WMATA should fully test advance technology (i.e. web-based reservations) and train employees and users on the technology before implementation. Until thorough testing and training is complete and the MetroAccess system is running smoother, advanced technology should not be “rolled out”. Pre-testing advanced technology with consumers is an important prerequisite.
- C. WMATA should ensure stranded passengers calling after normal business hours have the option to quickly contact an employee for help and that consumers understand the availability of this option. (The “Where’s My Ride” line now has a recorded message telling customers that someone is available to assist people after normal business hours).
- D. WMATA should clearly communicate to customers MetroAccess policies and allow customers to comment on proposed new policies
- E. WMATA should distribute MetroAccess materials widely in accessible formats. The MetroAccess users guide should be distributed to visually-impaired MetroAccess customers in the accessible format of their choice (electronic, large print or Braille) by June 30, 2006. In addition, these media should be distributed via newspapers, and accessible newspaper reading services, such as the Metropolitan Washington Ear Radio-Reading, and Dial-In newspaper reading service, as well as the National Federation of the Blind’s NewsLine dial-in newspaper services

2. WMATA and MV Transportation should further utilize scheduling and software strategies immediately

- A. *WMATA should reduce 14-day advanced reservation window to 7 days.* This policy change may benefit MetroAccess by decreasing the number of cancellations, including late cancellations and no –shows.
- B. MV Transportation should take greater steps to keep vehicles and drivers in familiar geographic areas.
- C. MV Transportation should assign standing order (template) manifests by area to individual schedulers to encourage familiarity with the street network and empower them to oversee the efficiency and effectiveness of these routes.

3. WMATA should use internal resources and hire an experienced paratransit consultant to evaluate the cost impacts of recommendations from the Best Practices Working Group, particularly door-to-door service, and examine any proposed MV Transportation cost increases. Results should be provided within 2 months.

Mid-Term (3 to 6 months)

4. WMATA should ensure that MV Transportation has adequate, experienced and stable staffing within 3 months

- A. WMATA should ensure that MV provides adequate staffing for the scheduling and dispatch functions to ensure effective service, which may require MV to increase its staffing levels.

- Each MV scheduler manages between 70 and 125 runs. A run is defined as a list of trips for a driver and a vehicle, and includes a pull-out and pull-in time. The paratransit best practice should have schedulers managing about 40-50 runs, if runs have 15 to 20 trips on average. This “best practice” range varies based on the number of subscription trips and the type of scheduling software program used.
 - Each MV radio dispatcher manages approximately 90 weekday runs. The paratransit best practice indicates that each radio dispatcher should manage no more than 30 runs each. If all the mobile data terminals (MDT’s) are functioning properly on all vehicles, a dispatcher could reasonably manage around 35 to 50 runs each.
- B. WMATA should ensure that MV Transportation pay and benefits attract experienced and stable workforce
- C. WMATA should periodically review staffing levels and turn-over rates for MV Transportation and sub-contractor employees to ensure adequate and stable staffing levels.
- D. MV Transportation should enhance employee training.
- MV should hold periodic refresher sessions to exchange “best tips”, allow schedulers, dispatchers, reservationists and drivers to exchange perspectives, and discuss disability sensitivity issues.

5. WMATA should strengthen contract oversight and monitoring within 3 months

- A. WMATA should increase the number of staff in the Office of MetroAccess to allow for:
- Performance data verification;
 - Service quality monitoring;
 - Customer service; and
 - Complaint resolution and response.
- B. WMATA should ensure adequate MetroAccess vehicle availability by increasing the spare fleet ratio to the contract requirement of 12%.
- The current MetroAccess spare fleet ratio is 10%. The industry best practice and FTA guideline for a spare fleet ratio is 20%.
 - WMATA should also begin work on a more thorough Capital Plan to manage vehicle and equipment purchases and maintenance and identify the required spare ratio as the fleet ages.

6. WMATA should adopt a user-friendly late cancellation policy and monitor no-shows carefully within 6 months

- A. Revise the current late cancellation policy to allow customers to cancel up to two hours prior to scheduled trip

- B. The first no-show is automatically forgiven, but the customer is automatically sent a written copy of the no-show policy
- C. Review chronic no-show subscription customers for needed changes
- D. Emphasize to customers that a late cancellation is preferable than being a no show for the trip
- E. Set fair and consistent guidelines for what constitutes an acceptable no-show
- F. Explore the possibility of a “rider reward” program

7. *WMATA should implement a door-to-door policy within 6 months*

- A. Enact a door-to-door policy, but reduce the required driver wait time from 10 to 5 minutes
- B. Train drivers on appropriate door-to-door assistance for passengers with disabilities
- C. Train dispatchers on added service dimensions required with door-to-door

8. *WMATA should develop a safety policy and a passenger assistance policy to clarify what users can expect from the service in terms of additional assistance beyond the curb or the door.*

- The policy would help clarify to MetroAccess customers and organizations serving persons with disabilities, including client centers for persons with developmental disabilities what is reasonable to expect from MetroAccess service. This item is related to recommendation 9 below.

Long-Term (6 months and longer)

9. *WMATA should clarify the relationship between human service transportation and ADA paratransit with regional and local partners within one year*

- A. Working with the National Capital Region Transportation Planning Board, WMATA should host a regional forum to bring stakeholders together to discuss potential partnerships to best serve MetroAccess customers with developmental disabilities in Montgomery and Prince George’s county
- B. WMATA should meet with the Maryland Secretary of Transportation and human service agencies to discuss how state and federal funding for public transit and human service transportation can be used to more effectively and efficiently serve consumers
- C. WMATA should work with local transit and human service agencies to increase travel training on the fixed route system within 6 to 9 months.
- D. WMATA should work with local transit and human service agencies to provide more efficient specialized transportation services that could reduce demand for MetroAccess paratransit.

- E. WMATA should work with local transit agencies to sensitize all bus drivers to the needs of seniors and passengers with disabilities, as part of the Customer First focus.

10. WMATA should examine the potential for a premium same-day service for MetroAccess customers in one year

- A premium same-day service for MetroAccess customers should be considered with the appropriate limits on the program. A user fare between \$5.00 and \$10.00 is suggested. The program should be limited in terms of maximum total cab fare allowed and/or total trip distance and perhaps even the number of same-day trips a MetroAccess user can take.
- As part of consideration of a premium same-day service, WMATA should work in conjunction with the local jurisdictions to ensure that each of the compact jurisdictions has accessible cab availability

11. The WMATA Board of Directors should host a Disability Awareness Event within one year

- Recognizing that awareness and attitudes greatly impact key decisions about transportation for persons with disabilities, the WMATA Board members should be offered the opportunity to participate in an awareness event where they would travel with people with disabilities on Metrobus, Metrorail and MetroAccess, similar to the TPB Access for All Disability Awareness Day. The Riders Advisory Council and the Interim Users Advisory Group should be involved in organizing the event.

Priority Recommendations

At the final Best Practices Working Group Meeting on May 15 each participant provided their top three priority recommendations. Some of these recommendations are policy issues, and they are referenced in italics. The following recommendations are the top priorities for MetroAccess as determined by the Working Group members:

- *WMATA should implement a door-to-door policy (Recommendation #7);*
- WMATA should improve customer service and communication (Recommendation #1); and
- WMATA should require MV to increase staffing levels for scheduling and dispatch functions (Recommendation #4 A).

Best Practices Working Group Report Appendices

- **Appendix A: Peer Review Report**
- **Appendix B: Specific Operational Recommendations for Reservations, Scheduling, Dispatching and Drivers and Vehicle Operations**
- **Appendix C: Interim Report from Ad-Hoc Committee**
- **Appendix D: List of Acronyms**

Appendix A: Peer Review

Best Practices Working Group Report

Peer Review Report

The benchmarking committee conducted a review of peer transit agency paratransit service practices and policies in several critical areas, including:

- **Reservations, Scheduling, Dispatch, Vehicle/ Driver Operations**
- **Door-to-Door v. Curb-to-Curb**
- **No Shows and Late Cancellation Policy**
- **Same Day Service**

Surveys, web based information, phone interviews and email were utilized to develop the peer review information on the policies and practices of various U.S. transit provider paratransit programs.

The Easter Seals Project ACTION brochure on “*Innovative Practices in Paratransit Services*”, the Transit Cooperative Research Program (TCRP) survey and report “*Practices in No-Show and Late Cancellation Policies for ADA Paratransit*”, the Metropolitan Washington Council of Governments (COG) Transportation Planning Board (TPB) Access for All Committee (AFA) report “*Improving Demand Responsive Service for People with Disabilities*”, the National Council on Disability report “*The Current State of Transportation for People with Disabilities in the United States*” and COG consultants Russell Thatcher and Rosemary Mathias all informed this review.

Peer Transit Agencies

Transit System	Avg. Daily Ridership: Total Transit System	Avg. Daily Ridership: Paratransit Program	Annual Paratransit Budget	Shared Ride	Door-to-Door	Curb-to-Curb	Same Day	On-Time Goal	Avg. On-Time Arrival
WMATA	1,100,000	4,500	\$51.4 m	Y	N	Y	N	93.5%	
MTA, MD	28,800 ¹	2,800	\$31 m	Y	N	Y	Y	92%	90%
PAT	235,600	6,700	\$32 m	Y	Y	N	N	94%	94.6%
TriMet	306,000	3,515	\$23.4 m	Y	Y	N	N	90%	92.8
MTA, NYC	7,100,000	11,151	NA	Y	Y	N	N	95%	93.7%
UTA	137,772	1,823	\$13.3 m	Y	N	Y	N	95%	94%
CTA	1,500,000	5,490	\$52 m	Y	Y	N	Y	82%	86.6%
MBTA	1,141,000	4,935	\$45.7 m	Y	Y	N	N	90%	98.1%
RTD	335,600	2,000	\$22 m	Y	Y	Y	N	93%	97%
BART	320,000	2,300	\$25 m	Y	Y	Y	N	91%	92.8%
TARC	60,210	1,369	\$9.7 m	Y	Y	N	Y	95%	NA
Metro Transit	320,700	3,700	\$38.8 m	Y	Y	Y	N	90%	91.3%
SEPTA	907,000	7,000	\$44 m	Y	Y	N	N	90%	92%

¹ Maryland MTA rail and paratransit ridership figure

1) Reservations, Scheduling, Dispatch, Vehicle/ Driver Operations

A. Management Structure

The structure of the scheduling, reservation and dispatch process is a vital component of the paratransit service delivery process, with various models offering different benefits. As the Easter Seals Project ACTION brochure on “*Innovative Practices in Paratransit Services*” states “any mistake made in reservations will have a ripple effect throughout the entire process.”

According to the Transit Cooperative Research Program (TCRP) survey, transit agencies utilize a wide variety of combinations of in house expertise, contract brokers and contract operators to perform the various operations that constitute paratransit service. Among the findings in the TCRP report, 59% of respondents perform paratransit reservations in house, 60% handle scheduling in house, 54% handle dispatch in house, and 62% utilize a contract operator for vehicle operation.

WMATA

The scheduling and reservation functions of WMATA’s MetroAccess program are performed by the contractor MV Transportation, with oversight and management provided by MACS staff.

WMATA currently utilizes a full service broker system, wherein one contractor is responsible for reservations, scheduling, central dispatch and management of the actual transportation of riders. Under this model, WMATA MACS staff are responsible for overseeing the contractor’s management of this service and ensuring that performance measures are properly monitored. WMATA specifically chose this approach in order to create a centralized system wherein information was shared system wide, to rein in costs and to enable the strict enforcement of performance measures. MACS supervision of this service is conducted with a staff of twelve, however, only approximately six employees are assigned to actual oversight and management of contractor functions, with five additional monitors starting in April.

MTA

The Maryland Department of Transportation (MTA) controls and operates all of the reservations, scheduling and dispatching in house. Reservations are currently operating with 29 part-time (30 hours) reservation agents, all of whom do work overtime to assist with the calls. Due to the demand of service, MTA recently hired 20 additional part-time employees (to start in the near future). In scheduling and routing, MTA currently has four employees and is in the process of hiring five more full time employees to handle increased demand. MTA has fourteen supervisors and is adding more staff there as well. MTA utilizes two contractors to operate the transportation function of the service.

SEPTA

The Southeastern Pennsylvania Transportation Authority (SEPTA) uses a separate contractor to handle reservations under the supervision of SEPTA. SEPTA staffs and manages the scheduling, dispatch, customer service, training and drug testing program in-house, while transportation services are provided by contract carriers.

RTD

The Regional Transit District (RTD) in Denver contracts with a total of five service providers who hire, train, and supervise drivers, mechanics and support staff. However, RTD contracts with a separate call center contractor. The call center contractor is responsible for reservations, scheduling and dispatch functions. RTD is responsible for contract compliance.

NYC

The New York paratransit service is provided through contracts with private transportation companies. Reservations, scheduling, and transit control functions are operated by a separate private contractor, under the direction of internal New York paratransit personnel.

TARC

The Transit Authority of River City (TARC) paratransit operation in Louisville utilizes a contractor to manage the central dispatch function for dispatching all TARC vehicles, as well as communication with customers concerning the status of scheduled trips. TARC provides reservation and scheduling services in house.

Metro Transit

King County Metro (Metro Transit) in Seattle utilizes four operations contracts. One contractor provides reservations, dispatch, scheduling, customer service and IT support for the service providers. This call center contractor subcontracts with taxi and cabulance providers for overflow service. They also do travel training and pathway reviews for conditional eligibility. Further, KC Metro utilizes three service delivery contracts. KC Metro owns the vehicles, but the three service providers are responsible for all vehicle maintenance in addition to providing rides. KC Metro performs contract oversight as well as all administrative functions such as policy and procedure development, registration and eligibility in house. The in-person evaluations for ADA eligibility are contracted out; however KC Metro makes all final ADA eligibility determinations.

B. Zone Strategy

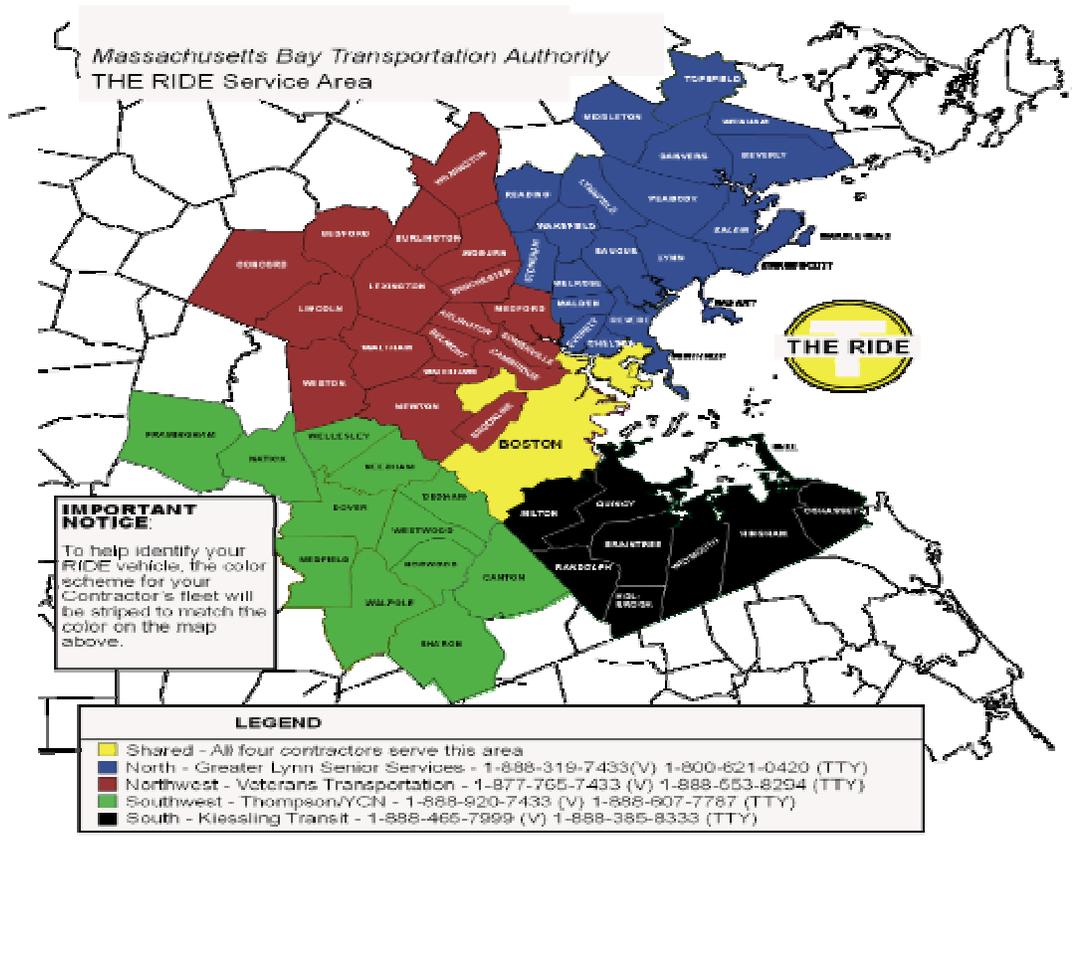
The brochure on "*Innovative Practices in Paratransit Services*" recommends implementation of a zone strategy to decrease the existence of long, circuitous trips and the inherent inefficiencies in scattering the paratransit vehicle fleet over a large service area.

NYC

NYC's zone strategy splits the five boroughs of New York into nine paratransit zones. Because the carriers have different size fleets and some specific experience in certain areas/zones, each carrier's route is assigned the zone coverage in conjunction with a required new "affinity settings" software function. Scheduling uses the zone setups along with the affinity settings to determine how the Adept scheduling engine considers what approximate amount of trips, etc. will occur in the zones that are assigned to the carriers but are not identified as primary zones for trip assignments.

MBTA

The Massachusetts Bay Transportation Authority (MBTA) has developed a zone strategy for delivery of paratransit services. In this strategy, MBTA's coverage area has been separated into five distinct service areas. MBTA's four paratransit contractors, who are all responsible for the schedules that they operate, each service one of the four zones. The fifth zone, which is comprised primarily of the city of Boston, is shared equally among the four contractors.



SEPTA

SEPTA's service area includes the major parts of five counties in southeastern Pennsylvania (Bucks, Chester, Delaware, Montgomery, and Philadelphia). The paratransit service is organized first by county, however, because almost 70% of service is provided in Philadelphia County, SEPTA has organized Philadelphia service into three geographic areas. Rides associated with centers and facilities in each of these areas then form the basis for scheduling within Philadelphia. In the four suburban counties, service scheduling is also facilities-driven with random trips fitted around various sites. Longer and/or random trips are placed on random vehicles with other trips with similar origins or destinations, based on geographic commonalities. One or more senior schedulers individually handle inter-county trips, which often are subject to transfer due to long distances.

C. Arrival Time Window

UTA

The Utah Transit Authority (UTA) utilizes a 30 minute “ready window”. The “ready window” begins 10 minutes before the stated pick-up time (“ready time”) and extends until 20 minutes after the ready time. If a vehicle arrives for a pick-up within the 30 minute ready window, the operators must wait for five minutes for the customer to arrive and board. If a vehicle arrives early (more than 10 minutes before the “ready time”) the operator must wait until the “ready window” begins and then for five more minutes.

NYC

New York City’s paratransit service utilizes a pick up window of 0-30 minutes. The driver is required to wait five minutes before declaring the customer a no show.

BART

The Bay Area Rapid Transit² (BART) system utilizes a 30 minute pick-up window. The vehicle may arrive at any time during the window, and is required to wait five minutes upon arriving within the pick-up window.

RTD

RTD utilizes a 30 minute pick-up window. Drivers may arrive any time prior to the start of the pick-up window however; the driver must wait six minutes after the start of the window before calling it a no-show.

TARC

TARC utilizes a 30 minute pick-up window, pick-up can occur 15 minutes before to 15 minutes after the scheduled pick-up time.

TriMet

The Tri-County Metropolitan Transportation District of Portland, Oregon (TriMet) utilizes a 30 minute pick-up window. The window begins at the negotiated time and ends after 30 minutes. If an operator arrives before the window, the customer can board if they are ready, but the operator is obligated to stay until the beginning of the window before they can start the five minute clock.

D. Advanced Trip Scheduling

The Easter Seals Project Action recommends reducing the advanced-reservation period as a best practice to reduce the number of cancellations of pre-scheduled trips.

² All BART paratransit information refers to East Bay Paratransit which is a paratransit service funded and administered by BART and AC Transit which have an overlapping service territory.

WMATA

WMATA's current policy allows customers to schedule trips up to fourteen days in advance.

TRIMET

TRIMET allows customers to reserve a ride up to fourteen days in advance.

BART

BART allows customers to schedule trips as early as seven days in advance.

UTA

The Utah Transit Authority (UTA) allows customers to schedule trips as early as seven days in advance.

MTA- Maryland

MTA in Maryland allows customers to schedule trips up to seven days in advance.

RTD

RTD allows customers to schedule trips as early as three days in advance.

SEPTA

SEPTA allows customers to schedule trips as early as three days in advance.

MTA-New York

MTA in New York provides customers a reservation window of up to two days in advance of the trip.

2) Door-to-Door Service v. Curb-to-Curb Service

According to the Transit Cooperative Research Program report "*Practices in No-Show and Late Cancellation Policies for ADA Paratransit*" approximately 50% of the 120 transit agency respondents provide door-to-door service and 6% some other service such as door-through-door or door-to-door as needed.

Further, the National Council on Disability report of June 30, 2005 recommends that "appropriate assistance between the door and the vehicle should be provided for people who cannot be served effectively by curb-to-curb service".

WMATA

WMATA's MACS program is a curb-to-curb service. MetroAccess drivers can assist customers to and from the curb.

MBTA

MBTA paratransit has always been structured as a door-to-door service since its inception in 1977. Upon passage of the Americans with Disabilities Act 1990, MBTA maintained that standard. MBTA also maintains that this service reinforces the key customer service elements from the training program and builds more of a positive driver/ passenger relationship. MBTA policy states that service is provided from the threshold of the main building entrance of the customer's point of origin to the threshold of the main building entrance of the passengers destination. The drivers will provide assistance at each location over a maximum of one curb and/or one step if the customer is in a wheelchair (several steps if passenger is ambulatory). Drivers are not required to carry any individual, wheelchair, or scooter, but they will assist with walkers, canes, crutches, wheelchairs, scooters and up to four parcels per passenger which will not be carried beyond the main building entrance. Contractors will make special arrangements for notifying a customer upon arrival at the pick-up location if the customer is visually and/or hearing impaired.

MBTA dwell times vary depending upon circumstances. For instance, ambulatory dwell times average one to two minutes boarding and disembarking, wheelchair users average five minutes boarding, three disembarking. The settings also vary among MBTA's four contractors, which are allowed some flexibility on this parameter, for instance, some contractors use one minute if using a sedan, but two minutes dwell time for a van when serving ambulatory passengers.

NYC

NYC's service is door-to-door. The door-to-door policy states that as long as the driver does not lose sight of the vehicle, the driver can assist the customer to and from the vehicle. Drivers are prohibited from entering a building. The driver will help the customer up or down the curb or one step and will assist the customer with boarding the vehicle. If the customer has packages, the driver will carry two bags totaling 40 pounds to the outside door of the customer's destination.

CTA

CTA in Chicago offers door-to-door service for paratransit customers. CTA drivers must stay within sight of the vehicle at all times. If the vehicle is not in sight, drivers are required to turn the car off and lock it. Drivers will assist customers as needed upon request with the use of securement systems, ramps and parcels that do not exceed 50 pounds. CTA does not track or record dwell time.

SEPTA

SEPTA provides door-to-door service. All drivers are required to get out of the vehicle, ring the bell to announce their arrival and assist customers to/from the vehicle. Drivers will provide "arm support" up/down steps to customers who use manual wheelchairs, and will bring the empty wheelchair up/down steps for the customer. While driver must get out of the vehicle and ring the bell, drivers are not required to provide assistance to/from the vehicle to customers using motorized wheelchairs or scooters. Drivers are required to assist customers with no more than two (2) packages with a combined weight of 50 pounds. SEPTA does not provide door-through-door service. However, drivers are required to go into the lobby of a public building or apartment complex and announce their presence, but at all other times, drivers are required to keep sight of their vehicles.

RTD

RTD in Denver offers door-to-door service only to those passengers who request it. There is no additional charge for this service. Door-to-door is available to the first entry of the drop off location, as long as the driver retains visual sight of their vehicle. Clients must be pre-qualified for door-to-door service and noted as such on the manifest. Drivers must keep vehicle in sight at all times and must take keys with them. According to the RTD paratransit riders guide, drivers are not permitted to enter beyond the threshold or ground level of any structure, drivers may not assist on unsafe or steeply inclined mobility ramps. Drivers are permitted to assist customers carry up to three packages on and off the vehicle, but packages must weigh no more than 20 pounds each.

RTD's average dwell time is three minutes.

TriMet

TriMet in Portland also offers door-to-door service. Drivers are instructed to maintain sight of the vehicle at all times. Drivers may go a few steps inside a building, such as to the reception desk in a medical facility, and are allowed to carry groceries inside a residence. Program staff does considerable negotiation and follow up regarding specific locations to ensure that drivers can safely access, and can maintain the vehicle within sight. In the event a driver cannot maintain sight of the vehicle, operators are instructed to contact dispatch, dispatch will then advise the operator to secure the vehicle, provide the service, and submit a write-up of the location issue. If there are concerns, such as customers on board who might act out, dispatch is authorized to send a field supervisor from the transportation provider office to assist.

TriMet's dwell time average is 3.8 minutes for pickups, and 2.9 minutes for dropoffs. TriMet allows three minutes for the first ambulatory pickup, and then subsequent pick-ups are factored down. Mobility devices add 3-4 minutes with separate factoring for subsequent occurrences of the same mobility type. TriMet also adds two minutes for deployment of the lift for ambulatory boarding.

PAT

The Port Authority Transit (PAT) in Pittsburgh PA offers door-to-door service as a component of the transit system's paratransit service. According to PAT staff, door-to-door service is essential to make the system truly useable by people with disabilities who could not tolerate waiting at the curb, or needed physical assistance to traverse pathways to and from vehicles.

BART

BART provides door-to-door service and requires drivers to keep the vehicle in sight and they are prohibited from going through a residential door or past the lobby of a public building. BART does not track or record dwell time.

3) No shows and late cancellation policy

According to the Transit Cooperative Research Program report "*Practices in No-Show and Late Cancellation Policies for ADA Paratransit*" issued in 2005, "excessive no-shows and cancellations can adversely affect the efficiency of service and significantly add to the cost" of paratransit services, while at the same time these policies can be crafted in a way to improve service efficiency and "better serve riders".

According to the TCRP report, of the 127 transit agency survey respondents, nearly 24% define a late cancellation as one that occurs less than one-hour before the scheduled trip, 21% for a trip less than two hours prior. Only nine survey respondents indicated that a late cancellation required a prior day notice or some variation, and only five agencies indicated that they provide incentives for paratransit riders who do not have no shows or late cancellations.

The COG paratransit report of February 15, 2006 recommends that WMATA implement a “user-friendly ‘no-show’ and ‘late cancellation’ policy”, while the National Council on Disability report recommends that paratransit service providers offer “incentives to reduce no-show rates”.

WMATA

WMATA’s no-show and late cancellation policy requires the customer to call by 4:30 PM on the day prior to the scheduled trip. Further, a passenger is considered a “no-show” when the vehicle arrives within the designated pickup window, waits ten minutes and the passenger fails to meet the vehicle. Three no-shows in a 30-day period will result in a two-week suspension of the customer’s MetroAccess service. Six late cancellations in a 30-day period (not canceling by 4:30 PM the prior day, will result in a two week suspension of MetroAccess service. WMATA has proposed revisions to the no-show late cancellation policy of requiring cancellations four hours in advance and 9:30 PM the prior night for travel before 9:00 AM to the Federal Transit Administration.

MBTA

MBTA’s no-show and late cancellation policy states that if a customer cancels a trip less than one hour before scheduled pick-up, the customer is documented as a “no-show”. Additionally, MBTA will record and document the customer as a “no-show” when a trip has been scheduled, a confirmation has been given by the contractor, and the customer fails to appear for the scheduled ride.

Further, MBTA’s policy states that before a customer is determined to be a no show, the dispatcher must confirm the location of THE RIDE vehicle using the Automatic Vehicle Locator (AVL) and Mobile Data Computer (MDC) device, which must be installed in all vehicles used for THE RIDE service. Once the dispatcher has confirmed, by using the AVL and MDC, that the driver is at the correct pick-up location, and has waited the appropriate amount of time for the customer, and has attempted to locate the customer, the dispatcher may then consider the customer a no show. A customer cannot be considered a no show without first confirming the vehicle location via the Automatic Vehicle Locator (AVL) and Mobile Data Computer (MDC). The contractor must provide a printed copy utilizing the Automatic Vehicle Locator (AVL) and Mobile Data Computer (MDC) of the vehicle location and time of day for each no show and must provide the documentation to MBTA on request. The paratransit contractor is required to provide a report to MBA on a monthly basis documenting customers who establish a pattern or practice of missing scheduled trips.

The driver will wait five minutes in the event that a customer is late before continuing to the next scheduled pick-up after receiving permission from dispatch. Dispatch will make a reasonable effort to contact the customer before allowing the driver to continue on the route (the five minute waiting period does not begin until the scheduled pick-up time).

CTA

The Chicago Transit Authority no-show and late cancellation policy requires the customer to cancel within two hours of the scheduled pick-up time. Any prescheduled trip where the customer does not board the vehicle within in five minutes of the vehicle's arrival, which can be within 30 minutes of the scheduled pick-up time, is considered a no show. Further, customers may not accumulate more than six no show's or late cancellations in any six month period. Customers will receive one warning letter upon exceeding six incidents, and subsequent occurrences will warrant a suspension of services, from one week for the first suspension to four weeks by the fourth set of incidents.

CTA has also established an appeals process for customers and consists of a panel that includes a member of CTA's ADA Advisory Committee.

MTA- MD

For the Maryland Transit Administration, a no show is a scheduled passenger who does not appear at the designated location for vehicle boarding within five minutes of a vehicle's arrival as long as the vehicle arrives within the designated on-time window. A late cancellation is less than two hours before the trip, or when a customer cancels the trip when the driver arrives for pick-up.

NYC

If the vehicle arrives within the 30-minute pick-up window, waits the required five minutes and the customer does not appear for the trip, it is considered a no-show. If a customer cancels a scheduled trip after 5:00 PM on the day before the trip is scheduled to take place, it is considered a late cancellation. Customers who accumulate no-show trips are subject to suspension: seven violations within a six-month period result in a two-week suspension; 2nd suspension within the same or next 6-month rolling period results in a three-week suspension; and a 3rd or subsequent suspension results in a four-week suspension. Subscription service is cancelled with a suspension. Customers have the right to appeal prior to enactment of a suspension.

PAT

PAT has a no show policy that is enforced only in instances of clear abuse. The no show rate for PAT paratransit service is less than 3%. PAT allows customers to cancel up to one hour prior to the trip with no penalty. PAT reviews weekly reports in order to identify repeat offenders. Several agency sponsors with no show rates that are historically higher than the system are offered a cash incentive in the form of a discount on the cost per trip. PAT focuses efforts on proper education of customer responsibility assists customers responsibility.

UTA

The UTA policy states that late cancellations and no shows cost the UTA and taxpayers thousands of dollars each year and affect UTA's ability to provide quality service to other riders. UTA takes a distinctive approach to no shows, including a point system for types of no shows and a corresponding point system for determining suspensions, and the development of a rider reward program to reward riders for customers who do not miss scheduled rides.

Under the UTA no show policy, customers are required to cancel a scheduled trip by 10:00 PM on the day prior to the trip, and customers are given suspension points for the following types of no shows:

1. Same day notice is charged to customers record if cancelled after 10:00 pm the day before but before 4 hours before scheduled ride. Customer is assigned 1 point.
2. Late notice is charged to customers record if cancelled ride between 30 minutes and 4 hours before scheduled pick up time. Customer is assigned 3 points.
3. No notice/cancel at door is if customer cancels a ride less than 30 minutes before the scheduled pick up time, or notifies the driver when the driver arrives that they are not going to utilize the ride, or are not present after the vehicle has waited five minutes, but before the driver departs customer arrives to take the ride. Customer is assigned 5 points.

UTA customers can be suspended from the paratransit service for the period of time based on the number of points you accumulate:

Points	Within	Suspension Period
12	30 Days	15 Day
24	60 Days	30 Days
36	90 Days	90 Days (loss of subscription)
48	120 Days	180 Days

However, UTA has also devised a “Responsible Rider Program” for riders who have a minimum of six one-way trips in a six-month period (reviewed 2 times a year with a maximum of 2 awards a year), and who have a good ridership record where the rider does not have any no-shows on their record. The reward will be as follows:

Category	Six Month Trip Record	Level	Good Rider Reward
Casual	Average 1 trip per week	Bronze	1 Free Round Trip
Frequent	Average of 3 round trips per week	Silver	3 Free Round Trips
Regular	Average 4 or more round trips per week	Gold	Monthly Paratransit Pass

BART

At the Bay Area Rapid Transit (BART) in San Francisco, riders are allowed up to five no-shows a quarter with cancelling less than one hour before the beginning of the pick-up window constituted as a no-show. Once a customer reaches six or more no shows, they receive a 30-day suspension from service, and can receive longer suspensions for subsequent violations. No shows which are truly beyond the rider’s control (e.g. sudden illness) are not counted against the customer.

METRO HOUSTON

At the Metropolitan Transit Authority of Houston (Metro Houston), customers are required to cancel a trip 30 minutes prior to the trip. If a customer does not call or does not show up for a scheduled trip, they are considered a "No-Ride." Metro Houston limits the number of No-Rides customers can have in one month to three.

Customers who have three No-Rides in a one-month period will receive a letter that puts customers on the No-Ride Confirmation Program. The No-Ride Confirmation Program requires customers to call dispatch 30 minutes before each trip to let Metro Houston know they intend to ride.

Customers are required to stay on the No-Ride Confirmation Program until they go one month without a No-Ride. While on the No-Ride Confirmation Program, a customer who fails to call in 30 minutes prior to each trip, will have all trips for the day cancelled. Customers that have two more No-Rides, while on the No-Ride Confirmation Program, privileges will be suspended for one week. After the one-week suspension, customers are returned to the No-Ride Confirmation Program until being No-Ride free for one month.

Continued abuse of the No-Ride Policy will lead to progressively longer suspensions, up to a permanent suspension. All appeals must be made in writing and received by Metro Houston within 60 days after you receive a certified letter of suspension.

Metro Transit

King County Metro in Seattle requires customers to cancel rides by 5:00 pm of the day prior to service the trip, or the trip is counted as a late cancel and treated as a no-show. A formal no-show is when the rider does not board the van within five minutes of the arrival on the day of service. No-shows may be excused for a reason outside the rider's control, such as illness. Customers receive a letter when they accumulate three no-shows, advising them of the policy. Six or more unexcused no-shows within a month and the rider may be suspended for one week. After the first suspension, subsequent occurrences of 6 or more no-shows within a month result in progressive suspension. 30 days for the second occurrence, then 60 days for a third, and then 6 months. The rider may appeal the suspension.

TRIMET

According to policy at TriMet, a customer no show occurs when a cancellation occurs less than one hour prior to the scheduled pickup time or a customer is not available to board within five minutes after a vehicle arrives, provided the arrival is within the scheduled pickup window. Three or more customer no shows within any 30-day period is grounds for suspension of service for up to 30 days. Whenever a no show occurs, the customer is responsible for contacting LIFT to cancel any other scheduled trips later that day that they will not be taking. Circumstances outside the customer's control will be considered in determining if a no show is the customer's responsibility.

NJ Transit

At New Jersey Transit (NJ Transit) customers are automatically forgiven for their first no-show or late cancellation, however, customers are also then sent a written copy of the NJ Transit no-show and late cancellation policy to ensure customer familiarity with the policy.

4) Same Day Service

A. Same Day Service

Offering same-day premium taxi service to paratransit customers can be a critical enhancement to the mobility of paratransit riders. According to the Transit Cooperative Research Program report approximately 9% of transit agencies offer same day service, while more than 70% of agencies responding to the TCRP survey reported requiring a trip reservation to be made by 6PM or earlier the prior day.

WMATA

Currently, WMATA does not offer same-day service.

CTA

At CTA in Chicago, the transit agency manages two separate same-day service options. The Taxi Access Program (TAP) and Mobility Direct. TAP is a same-day program that utilizes a voucher system wherein each voucher cost customers \$1.75. A voucher is good for up to \$13.50 on a taximeter; once the meter exceeds that price the customer pays the difference. The value of the voucher is equivalent to approximately six miles of travel. CTA set the price for this program as the same price as the primary advanced schedule complementary line service. CTA spent approximately \$6.9 million to operate TAP in 2005. Mobility Direct is a subscription service for people with regular trips at the same time and day. It is a cash system, with a fare of \$1.75 for a trip within ten miles or less. Any cab company can participate in this arrangement, once eligible under CTA guidelines. Currently ten taxi companies have signed up to participate in these programs, however it is estimated by CTA that there are only 48 accessible cabs in the region and that more are necessary to improve this service. According to CTA, the City of Chicago does provide incentives to Cab companies to make them accessible.

MTA

The Maryland Transit Administration's (MTA) same day service is known as Taxi Access. Any MTA paratransit customer may apply for Taxi Access after using the paratransit service for 90 days. Since this is a separate premium service that is not required by ADA, customers are required to complete a new application. Once the customer receives their Taxi Access card, they may take up to 4 trips per day, not to exceed \$50 per ride, with each trip costing the customer \$3. Unlike the MTA paratransit service where all rides must be scheduled at least 24 hours in advanced, a customer is able to call 30-45 minutes in advance to a participating taxi company to be transported to their destination. The average cost of a same day trip for MTA is \$25. It operates the same service area as the regular paratransit service and averages 1,100 trips a day.

BART

BART does not offer same day paratransit service, except what BART terms "go-backs". A "go back" occurs when a rider misses or cancels their return ride due to circumstances beyond their control—for example a doctor visit that ran late. There is no penalty for cancellations and no extra charge for service under this scenario.

TARC

TARC in Louisville provides same day service on a space available basis only.

Appendix B: Specific Operational Recommendations for Reservations, Scheduling, Dispatching and Drivers and Vehicle Operations

Best Practices Working Group

Four Themes Resulting From Brainstorming at March 31 and April 6, 2006 Meetings

Study Area: Reservations, Scheduling, Dispatching and Drivers and Vehicle Operations

Four Themes/ Recommendations

- A.** Improve customer service and communications
- B.** Ensure adequate, experienced and stable staffing
- C.** Utilize scheduling and software strategies
- D.** Strengthen contract oversight and monitoring

A. Improve Customer Service and Communications

- a. A Customer First focus should be embedded in personnel training and staff meetings.
 - i. Sensitivity training should be provided to Reservationists, Dispatchers and Drivers to provide a better understanding of various mobility needs as well as the psyche of customers with disabilities
 - ii. The communications flow regarding exchanging information and resolving disputes between driver, dispatcher and any customers who may be on-board should be diagrammed, analyzed, and standardized.
 - iii. Personnel should receive positive reinforcement for quality performance
 - iv. Supervisors should use the telephone system to randomly monitor reservationists' and dispatchers' Customer First focus
- b. WMATA should review MV's standardized reservationist script and procedures for every type of call
 - i. Reservationists and Dispatchers should provide their first names to customers
 - ii. Reservationists should use Locations whenever possible in booking rides and ensure that the customer understands and confirms the pickup site at the desired location in reservation process (ie: Capitol Building, Union Station).
 - iii. Once the Trapeze database includes several weeks (one month?) of data where the geo-codes for the addresses are correct, Reservationists should be allowed and encouraged to use the Frequent trips option to book rides to clients' favorite destinations.
 - iv. Reservationists should communicate clearly the pick-up window to the customer, not a specific pick-up time
 - v. Reservationists should provide customer during reservation call with a realistic expectation of ride time.
 - vi. Reservationists should note 'latest arrival' time for customers who cannot arrive late on going trips
 - vii. Reservationists should note 'earliest departure' time for customers who cannot leave early (ie: customer cannot leave work until after 4:45 PM) on return trips.

- viii. Reservationists should verify customer data throughout call reservation process, including
 - 1. specific mobility needs (visually impaired, wheelchair, PCA's, companion, etc...)
 - 2. preferred phone number to contact customer
 - ix. Reservationist should clearly confirm ride information at close of call
 - x. Reservationists should avoid placing customers on hold
 - xi. Reservationists should record every trip cancellation in trip notes (who canceled the trip and when)
- c. Dispatch personnel should follow formal communications and operational procedures.
- i. Dispatchers should use standard radio codes whenever appropriate.
 - ii. Dispatchers should tell customer the truth even when the news is not good (i.e., realistic time when vehicle will arrive)
 - iii. Dispatchers should be provided customer-focused scripts for frequent situations. In early arrival scenarios for example, say “Your vehicle is early, are you able to leave earlier?” instead of “Your vehicle is outside, please come out”.
 - iv. Dispatchers should never cancel and rebook rides
 - v. Dispatchers should put detailed notes in trip file for no-shows and same day cancellations.
 - vi. Dispatches should check Automated Vehicle Locator data both for the vehicle location and the pickup location to ensure congruency and that the driver has waited the current 10 minutes before authorizing driver to leave location and mark customer as a no-show
- d. The Interactive Voice Response (IVR) procedures should be reviewed for simplicity and consistency.
- i. MetroAccess should make sure that the automated customer call-backs confirming the pick-up time give the pick-up window (i.e. between 9 am and 9 :30 am) and not the estimated arrival time (i.e. 9:15am)
 - ii. Until MetroAccess is operating smoothly and employees (as well as consumers) are properly trained, do not implement more advanced technology including web based reservations and additional IVR features.
 - iii. Review the IVR sequence and scripts to ensure that a stranded passenger calling after normal business hours has the option to quickly contact the employee on duty.

B. Ensure adequate, experienced and stable staffing

- a. Increase and periodically review MV staffing levels within each personnel class.
 - i. The number of schedulers should be based upon the number of both "live" schedules to be reviewed and Template groupings to be developed or reexamined. Currently, each MV scheduler is handling about 70 peak runs and 125 non-peak runs. A best practice is that each scheduler should be managing about 40-50 runs, if each run has about 15-20 trips.
 - ii. The number of dispatchers should be based upon the number of runs each dispatcher would be overseeing in each shift. Assistant dispatchers may be used to update real time information on drivers in vehicles without working mobile data terminals and answer “Where’s my ride” calls.

- iii. The number of drivers is dependent upon scheduling strategy and efficiency as well as system policy. Are some routes restricted within specific geographic areas?
 - iv. Maintain an extraboard driver roster to cover a certain percentage of runs. The % should be negotiated between MV and WMATA. Of that %, one-third (also subject to negotiation) should be stationed in vans at strategic locations in the community to more quickly provide assistance.
- b. MV should enhance employee training.
 - i. Periodic refresher sessions to exchange “best tips”, allow schedulers, dispatchers, reservationists and drivers to exchange perspectives, and discuss disability sensitivity issues.
 - ii. Revise current employee training curricula to address recommendations in Section A, above. "
 - iii. Ensure that drivers know how to interpret pick-up time window and that manifests clearly state the estimated time of arrival (in bold, such as 9:00 am) and state window (9:00am and 9:30am) in smaller font
 - iv. MV and subcontractor drivers should be required to have 3 weeks of training; one week of in-class instruction and two weeks on-the-road training.
- c. MV and WMATA should continue to hire people with disabilities.
- d. WMATA should amend the contract so that MV and subcontractor employees are adequately compensated to ensure a qualified, experienced and stable workforce, including drivers and other operational staff.
 - i. One strategy to do this would be for WMATA to amend the MetroAccess contract to allow for implementation of a blended hourly rate that would allow for controlled pass-through of staff compensation.

C. Utilize Scheduling and Software Strategies

- a. The Trapeze databases must be accurate and easy to use
 - i. The Trapeze Locations file should reorganized in order to speed the look-up process during calls.
 - ii. MetroAccess should establish standard pick-up locations for destinations with multiple entrances and reservationists should confirm location during the reservation process. This may require the Location File to have 2+ listings for a site - one for each allowable pickup location.
 - iii. WMATA Eligibility personnel must be diligent and complete in recording customer information in the Client File, including middle initials.
- b. System policy changes are needed to improve the efficiency and quality of the service.
 - i. Allow the driver to knock on the door rather than remain inactive during the entire prescribed wait time – also to eliminate unnecessary dwell time
 - ii. Reduce fourteen day advanced reservation window to seven days to avoid pressuring passengers to book rides before they are sure they can use them (and reduce cancelled or no-show trips)

- iii. Consider granting subscription ride requests only if the scheduling staff can group the ride effectively
 - iv. Consider allowing the broker to provide incentives or simply require modifications within limitations to current or requested subscription rides so that scheduling staff can group rides effectively
 - v. Consider timed-transfers between MetroAccess and Metrorail
 - vi. Consider timed-transfers for very long trips between MetroAccess vehicles
- c. Within current policies, revisions in strategy can improve the efficiency and quality of the service.
- i. Define allowable ride time parameters based upon mileage to reduce circuitous routing (ie: 0-3 miles ride time cannot exceed X; 3-5 miles ride time cannot exceed Y)
 - ii. Develop a route assignment strategy based on geographic ranges for vehicles and drivers (fleet or zone strategy)
 - iii. Continue and Maximize use of subscription templates for trips to common locations and evaluate regularly to ensure efficiency
 - iv. Revisit the former broker's strategy of assigning schedulers familiar with relevant sub-area (DC, Virginia, MD) to review Trapeze template schedules before finalizing
 - v. Periodically re-batch and re-schedule as trip date approaches. Best practice: When scheduling 14 days in advance, rebatch trips 10 days before, 5 days before, 3 days before and then the day before and have the schedule reviewed by an employee
 - vi. Identify group trip opportunities during scheduling
 - vii. Specifically review long trips for possible grouping, improved vehicle assignment, or possible timed-transfers
 - viii. Schedulers should consult with drivers to review the accuracy and adequacy of current and potential template schedules
 - ix. Build in dwell time, based on driver input, for specific situations (i.e.: rearranging wheelchairs to allow the first boarding wheelchair user to also be the first departure.)
 - x. Develop a system to frequently monitor street conditions (i.e.: closings, events, repairs, accidents, etc...) and communicate those events to drivers, dispatchers and schedulers.
 - xi. Carefully track and manage the unscheduled trip list. This list should primarily include short trips, which are easier to place.
 - xii. Procure a license to overlay the map grids used in the map books used by the drivers (currently Rand McNally) into the Trapeze street file. Include the page and mapgrid designations for each stop in the printed manifests; information reported to the mobile data terminals; Scheduler Editor display; and eventually ,through re-geocoding, the Client and Template files. This will greatly assist the drivers in mapping their route for the day and finding stop locations.
 - xiii. With reference to a 'Fill' Report or similar report to assess the largest number of ambulatory passengers and wheelchair-users on board each route on a typical day, recommend the optimal fleet configuration to WMATA. Scheduling efficiency might improve if some template runs could be assigned larger capacity vehicles.
 - xiv. Continue to use only dedicated vehicles as much as possible. When taxis are used, ensure that the taxi companies are adequately managed and monitored to ensure quality.

- xv. Review the printed manifest structure and Mobile Data Terminal (MDT) display to ensure that the driver knows the pickup window for each trip. On the manifest, one can use bold print for the specified time and italics for the window.

D. Strengthen Contract Oversight and Monitoring

- a. WMATA MetroAccess staff should have desktop hardware access to the Trapeze databases ASAP so they are able to verify performance data and respond quickly to information requests.
- b. The final 77 Mobile Data Terminals (Rangers) should be installed in vehicles ASAP
- c. WMATA must ensure that the broker has an adequate fleet spare ratio. 20% spare ratio is the industry standard. The current spare ratio is less than 10% and is sustainable only with a substantially new fleet.
- d. WMATA staff should periodically review samples of the database to ensure that dispatchers are not canceling and re-booking trips, including detailed notes in trip file for no-shows and same day cancellations, and checking Automatic Vehicle Locator (AVL) data to ensure that drivers are waiting in the correct location for the prescribed time before authorizing driver to leave location and mark customer as a no-show.
- e. WMATA staff should periodically review samples of the database to ensure that Reservationists are recording trip cancellations in trip notes (who canceled the trip and when)
- f. MV should provide a “Daily Provider Operations Report” to WMATA with detailed information on staffing levels, trips, vehicles and runs from MV and the subcontractors (sample report on the following page)
- g. WMATA should carefully examine the pilot program that allows drivers to have cell phones and contact passengers directly. Drivers should not be allowed to circumvent central dispatch which is critical to good customer service and smooth MetroAccess operations.

Sample Daily Provider Operations Report

Provider: _____

Wait Listed Trips:

Start of Day	8 AM	10 AM	Noon	2 PM	4 PM	6 PM
_____	_____	_____	_____	_____	_____	_____

- A. Total Routes Scheduled at the Start of the Day _____
- B. Additional Runs Created During the Day _____
- C. Total Runs Created for the Day (A+B) _____

Peak Fleet Requirement (# Peak Runs)	Total Fleet	Vehicles Out (Maintenance)	Vehicles Out (Repair)	Vehicles Available	# of Spares Available
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Vans	_____	_____	_____	_____	_____	_____
Sedans	_____	_____	_____	_____	_____	_____

- 1. Total Routes Created (should equal (C) above) _____
- 2. Number of Drivers Performing Two Runs _____
- 3. Number of Drivers Needed to Cover All Runs (1-2) _____
- 4. Number of Drivers Reporting for the Day _____
- 5. Number of "Floater" Drivers Available (4-3) AM _____
PM _____
- 6. Routes Closed Due to Lack of Drivers AM _____
PM _____
- 7. Routes Closed Due to Lack of Vehicles AM _____
PM _____
- 8. Number of Road Supervisors Reporting AM _____
PM _____
- 9. Number of Dispatchers Reporting AM _____
Midday _____
PM _____

Additional Notes or Comments: _____

Appendix C: Interim Report from Ad-Hoc Committee

MetroAccess Ad Hoc Advisory Committee *Interim Report Released May 4, 2006*

Committee Formation

On February, 16, 2006 the Washington Metropolitan Area Transit Authority (WMATA) Board of Directors created an ad hoc committee to review WMATA's MetroAccess (MACS) paratransit service. The Board tasked the committee with recommending improvements for MetroAccess service.

The Board requested that the advisory committee complete its report to the full Metro Board in 90 days, and to provide an interim report in 45 days. This report is the ad hoc committee's interim report.

Membership

Metro Board member Dana Kauffman and Riders' Advisory Council Chair Dennis Jaffe serve as co-chairs of the advisory committee. Other members include:

- Board member Jim Graham
- Board member Robert Smith
- Patrick Sheehan, chair of Metro's Elderly and Disabled Transportation Advisory Committee
- Mary Williams, chair of the Riders' Advisory Council's MetroAccess Subcommittee and a MetroAccess rider
- Penny Reeder, Maryland MetroAccess rider
- Ann Pimley, Virginia MetroAccess rider
- Harold Snider, chair of the Montgomery County Commission for People with Disabilities and a MetroAccess rider
- John R. Hudson, Program Manager of the Disability Services Planning and Development Department for Fairfax County
- Takoma Park Mayor Kathy Porter, who is Chair of the Transportation Planning Board's Access for All Committee which did the recent report on MetroAccess service
- Scott Vining, chair of the Elderly and Disabled Transportation Advisory Committee MetroAccess Subcommittee

Committee Scope

The committee met on March 6, March 30 and April 24.

The committee agreed to a general scope of work to review existing WMATA MetroAccess services to develop recommendations for improving service. The committee's scope includes:

- 4) Providing a venue for MetroAccess riders to give input into ways to improve service and incorporate rider recommendations**
- 5) Reviewing "Best Practices" for paratransit service and identification of best practices for WMATA to implement**
- 6) Developing a program for improving MetroAccess service and responding to recommendations made by the TPB Access For All (AFA) advisory Committee study "Improving Demand Responsive Services for People with Disabilities in the Washington Region"**

The ad hoc committee's work in each of these areas has been guided by the priority recommendations of the COG TPB report on improving MetroAccess service. The report identified shortcomings in existing WMATA MetroAccess paratransit services from the perspective of customers, human service agencies, and transportation providers.

The AFA report made 15 recommendations in total, and identified the following as priorities:

- **MetroAccess should improve informational materials to clarify what users can expect** – MetroAccess should provide extensive, well-organized information in multiple, accessible formats, and make this information widely available.
- **MetroAccess should improve its complaint process** – Complaints should be handled entirely within WMATA (not by the provider or broker), should be linked with first-hand observations of specific vehicles and drivers, should be categorized and tracked, and customers should receive meaningful and timely feedback.
- **MetroAccess should ensure that users have direct input** – A new user group should be established to bring together users, transportation providers, and management staff. The user group should be able to communicate directly with the WMATA Board, and should be involved in monitoring customer satisfaction through surveys, a mystery rider program, and performance reports.
- **WMATA should provide premium same-day service to MetroAccess customers** – WMATA should implement a pilot program allowing users to call private transportation companies directly and pay a subsidized fare (typically higher than ADA fare), based on successful programs in Baltimore, Houston, Seattle and Chicago. In addition to providing users with more options, a steady demand for same-day service creates additional incentive for accessible taxicabs and can reduce the demand for traditional paratransit service.
- **Conduct an independent review of MetroAccess by January 2007 with the “check list”** An independent review of MetroAccess should be conducted based on the check list identified in the report, with involvement from persons with disabilities and the TPB Access for All Advisory Committee. The check list is based on management and operational considerations that MetroAccess or other paratransit systems have had difficulties with in the past. The checklist is provided not only to guide a review of the service in 2007, but also to be of assistance to WMATA in ongoing service monitoring and management.

Interim Findings and Status Report

The interim findings and status report for each of the four areas identified in the committee's scope of work are as follows:

1) Providing a venue for MetroAccess riders to give input into ways to improve service and incorporate rider recommendations

The Riders' Advisory Council and the Elderly and Disabled Advisory Committee sponsored two forums for MetroAccess riders on Monday, March 13. The forums were held to allow riders to voice their concerns about MetroAccess service.

The forums took place at the Jackson Graham Building at Metro Headquarters. MetroAccess riders and

others who are interested in improving MetroAccess largely voiced specific areas of dissatisfaction with the service and made suggestions. Customers also had the opportunity to discuss individual concerns one-on-one with MetroAccess and MV staff.

Additionally, WMATA staff polled a random group of people who attended the forums to determine the best ways to communicate with MetroAccess customers. From this information, staff is developing a new customer communication plan (see section 3).

Comments from the meeting were delivered to the full MetroAccess ad hoc committee at the committee meeting of March 30, 2006. The committee will incorporate the information gathered at these forums into the final report on recommended improvements to MetroAccess service.

The DRAFT “Summary of Comments” from the Riders Advisory Council and the Disabled Advisory Committee is attached as appendix 1.

The ad hoc committee has also created an Interim MetroAccess Board Advisory Team, independent of the ad hoc committee, to review and monitor MACS progress on improving the complaint process and customer service reports and the implementation of the ‘best practices’ recommendations. The Interim MetroAccess Board Advisory Team has been created, in part, to address the AFA report recommendation for development of a user group that can ensure that users have direct input on MetroAccess. Mary Williams of the Riders Advisory Council and Patrick Sheehan of the Elderly and Disabled Transportation Advisory Committee will chair this effort.

2) Reviewing “Best Practices” for paratransit service and identification of best practices for WMATA to implement

The committee established a team of service professionals and users to complete a review of “best practices” in paratransit services and to address issues raised in the AFA report. The best practices sub-committee is chaired by Wendy Klancher, from the Metropolitan Washington Council of Governments (COG). Members of the sub-committee include:

- Dan Dalton, Easter Seals Project ACTION
- Jachebed Jordan, IONA Senior Services
- John Smolenski, MTA Deputy Administrator
- Harold Snider, Montgomery County Commission for People with Disabilities
- Penny Reeder, MetroAccess rider
- Mary Williams, Riders’ Advisory Council
- Steve Yaffe, Fastran- Fairfax County
- Carolyn Bellamy, MetroAccess rider
- Elizabeth (Buffy) Ellis, KFH Group
- Christian T. Kent, Director of MetroAccess Services
- Jon Monson, MV Transportation.

The team is using the Easter Seals Project ACTION brochure on “Innovative Practices in Paratransit Service,” the Transit Cooperative Research Program (TCRP) survey and report “Practices in No-Show and Late Cancellation Policies in ADA Paratransit” and the COG TPB report to support its work. The sub-committee is also acquiring information on the policies and practices of various U.S. transit provider paratransit programs. The team is also using, courtesy of COG, the services of Russell Thatcher, of Transystems, Inc., who served as the expert consultant on the COG MetroAccess TPB report.

The scope of the best practices team includes:

- Reservations, scheduling, dispatch and driver/vehicle operations
- Door-to-door v. curb-to-curb service
- No shows and late cancellation policy
- Same day service
- Human service transportation coordination

The team is currently focused on MetroAccess policy and operational practices for reservations, scheduling, dispatch and driver/vehicle operations. Additionally, the team is examining peer transit agency practices in the key policy areas of door-to-door v. curb-to-curb service, no shows and late cancellation policy and same day service. The team has held four meetings. A copy of the best practices team report provided to the ad hoc committee on April 24, 2006 is attached as appendix 2.

3) Developing a program for improving MetroAccess service and responding to recommendations made by the TPB Access for All advisory Committee study “Improving Demand Responsive Services for People with Disabilities in the Washington Region”

WMATA staff, under the guidance and review of the members of the committee, has begun to undertake an extensive review of WMATA MetroAccess customer service practices, and are continuing to develop a series of recommendations to improve the quality of customer service. The goal of this effort is to provide high quality and timely responses to customer questions and complaints and to use information from MetroAccess customers to improve service delivery.

The review is examining areas for improvement within 90-days, 180-days and the long-term. Improvements are based upon industry standards for customer service and customer communication, and respond to requests from current MetroAccess customers for service that is more sensitive to their needs. Recommendations which may be unfunded will need to be addressed in the final report.

WMATA and MetroAccess are developing specific recommendations and actions for consideration to improve the customer complaint process, ensure that customers have direct input and improve customer informational materials, including:

- Revising customer complaint process to ensure appropriate and effective management and oversight controls, including timely and substantive responses to complaints
- Developing standards of interaction that improve sensitivity to customer needs
- Developing a recurring sensitivity training regimen
- Improving customer service employee familiarity and knowledge of MetroAccess policies and services, and standards for customer service related to customer service employee familiarity and knowledge should also be established, and should include training and on-going monitoring of customer service employees
- Developing MetroAccess “specialists” in customer service
- Improving all customer service scripts and standardizing all scripts along all points of customer contact, including reservation, follow-up, where’s my ride, and customer service calls
- Developing a process to inform customer service agents of events that impact customer (ie: system failure, power outage, etc...)

- Installing a call monitoring system for MV phone system and improved monitoring of customer service agents and dispatchers
- Adding all new MetroAccess customers to WMATA Customer Relationship Management (CRM) database
- Periodically reconciling MV and CRM customer databases
- Integrating MV and WMATA customer databases
- Creating “How Do We Rate” customer survey cards in accessible formats to be used by MetroAccess for review and action, with review and assistance from the advisory/team users group
- Creating customer satisfaction surveys for customers upon completion of reservation and dispatch communication, with implementation review and assistance from the advisory/team users group
- Acknowledging written complaints upon receipt
- Developing and including an accessible format Customer Bill of Rights in all vehicles
- Creating a quarterly newsletter
- Re-developing the Users Pocket Guide reflecting changes in policy and practice
- Strengthening the new customer enrollment process to provide better orientation for new MetroAccess customers about the service, including their rights and responsibilities, and opportunities for providing feedback.

Interim Report Conclusion

The MetroAccess ad hoc committee is focused on the development of critical, achievable and sustainable improvements to the delivery of WMATA’s paratransit service. It is especially important that these improvements be delivered consistently to MetroAccess customers so that gaps between the program's standards and the program's actual operations be eliminated.

The work of the committee to date has identified a number of potential changes and improvements that can be made to enhance this service over the short, intermediate and long-term. The committee intends to continue its efforts and to provide a final report, including specific policy, programmatic and operational recommendations with cost analysis where applicable, to the WMATA Board of Directors in June.

Appendix D: List of Acronyms

Best Practices Working Group

List of Acronyms

Transit Organizations:

WMATA	Washington Metropolitan Area Transit Authority
MTA	Maryland Transit Administration
PAT	Port Authority Transit, Pittsburgh
TriMet	Tri-County Metropolitan Transportation District, Portland Oregon
MTA	Metropolitan Transportation Authority, New York
UTA	Utah Transit Authority
CTA	Chicago Transit Authority
TAP	Chicago Taxi Access Program
MBTA	Massachusetts Bay Transportation Authority
RTC	Regional Transit District of Denver
BART	Bay Area Regional Transit, San Francisco
Metro Transit	King County Metro, Seattle Washington
SEPTA	Southeastern Pennsylvania Transit Authority, Philadelphia
TARC Metro	Transit Authority of River City, Louisville
Houston	Metropolitan Transit Authority of Harris County, Houston Texas
NJ Transit	New Jersey Transit

Other Organizations and Acronyms:

MACS	MetroAccess
COG	Metropolitan Washington Council of Governments
TPB	National Capital Region Transportation Planning Board
AFA	Access for All Advisory Committee
TCRP	Transit Cooperative Research Program
FTA	Federal Transit Administration
IVR	Interactive Voice Response system
MDT	Mobile Data Terminal
AVL	Automatic Vehicle Locator
CRM	Customer Relationship Management