



Regional Transportation Authority

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RTA Transportation Planning Committee

Wednesday, January 4, 2012

Agenda Packet Memo

Report from Transit Working Group – Regional Dial-a-ride Policies and Branding

Background:

Based on the voter-approved 2006 Regional Transportation Plan (RTP) and the Transit Element Policies, Objectives and Procedures (POP), the RTA is charged with creating a seamless regional transit system and expanding services for seniors and persons with disabilities under the Special Needs Transit Service category (Project 47). Planning efforts and changes to the Special Needs Transit Service since 2006 are described in Attachment A. Although positive changes have been made to Special Needs Transit Services, no definitive agreement has been reached on how to implement a seamless regional system for seniors and persons with disabilities.

More recently, local jurisdictional funding of transit services for seniors and persons with disabilities has become a critical issue with the elimination of Local Transportation Assistance Funds (LTAF). This funding shortfall has caused communities to look for alternatives to sustain their existing transit services. In July 2011, the Town of Oro Valley asked the RTA to consider regional options for its Coyote Run service. Lastly, three of RTA's fixed-route neighborhood circulator services (Routes 402, 420 and 425) have evolved toward a general public dial-ride system (Sun Shuttle Dial-a-Ride) to more appropriately serve the areas around the Town of Oro Valley and Green Valley/Sahuarita.

Dial-a-ride service is characterized by the use of vans or small buses operating in response to calls from passengers to the transit provider, who then dispatches a vehicle to pick up the passengers and transport them to their destinations. This type of service is most often provided by transit agencies for persons with disabilities to comply with the American with Disabilities Act (ADA), which is defined by the Federal Transit Administration as paratransit service. Dial-a-ride service is also used to provide transit service for seniors and the general public.

Discussion Points:

Given the above, the Transit Working Group identified a strategy which would make incremental progress toward creating a seamless regional dial-a-ride system by focusing on four initial objectives and associated tasks:

1. Creating common service policies and standards between the various existing dial-a-ride services.
 - Evaluate policies and standards and options for commonality
 - Recommend and approve common policies and standards
2. Establishing a regional dial-a-ride system brand that can be used to unify the various existing dial-a-rides.
 - Evaluate brand options and implementation strategy
 - Rebrand Coyote Run, RTA Special Needs (Handi-car) and Sun Shuttle Dial-a-Ride
3. Establishing a single customer call number
 - Evaluate options and implementation strategies
 - Implement/consolidate call center functions (reservations, scheduling and dispatch)
4. Expanding the special needs service boundary to include unserved portions of Marana.
 - Evaluate unserved areas and potential implementation strategies
 - Recommend service area expansion to unserved areas

These objectives are consistent with recommendations identified in prior RTA studies and Transit Working Group recommendations. To date, the Transit Working Group has evaluated and developed initial recommendations for three of the four objectives: 1) service policies and standards; 2) regional dial-a-ride system brand; and 3) single customer call number. The Transit Working Group will continue to evaluate the customer call number and service boundary objectives in the next few months and will forward additional recommendations to the RTA TPC at that time. Provided below is information on:

- Recommended regional service policies and standards
- Initial recommended regional dial-a-ride brand
- Initial customer call center phasing plan
- Anticipated implementation schedule

Regional Service Policies and Standards

Based on existing policies and service standards for Sun Van, Handi-car, Sun Shuttle Dial-a-ride and Coyote Run, the Transit Working Group discussed 31 service policies and standards, which deal with the following operational areas:

- Eligibility
- Days of Operation and Service Hours
- Scheduling and Reservations
- Fares
- Cancellations and No Shows
- On-time Performance
- Operations Policies
- Suspension and Appeal

The Transit Working Group worked toward creating commonality between the existing policies and service standards. In most cases, minor modifications were made to the existing policies. The Transit Working Group also defined two ADA service types as follows:

- Complementary ADA Service (49 CFR Sec.37.131) – federally mandated origin to destination service that operates in the same area and same operating hours as fixed routes (excluding commuter routes) has comparable response times and fares, meets any trip purpose and has no limits on service availability due to capacity.
- Optional ADA Service – demand response, origin to destination, transit service that operates beyond federal ADA paratransit mandates and requires regional ADA certification for eligibility.

The recommended service policies and standards for complementary ADA service, optional ADA service, seniors and general public dial-a-ride are described in Attachment B.

Regional Dial-A-Ride Brand

The Transit Working Group agreed to use the following principles for Sun branding of the regional dial-a-ride system:

- Minimize the disruption of existing brands
- Use the existing brands for regional branding rather than create new sub-brand

Based on these principles, three general options are available: 1) Using Sun Van, 2) Using Sun Shuttle Dial-a-ride; 3) Using both Sun Shuttle Dial-a-ride and Sun Van with the possibility of consolidating to one name at a future date. The Transit Working Group is recommending option three and that as an initial first step the Sun Shuttle Dial-a-ride name be used for the integration of Coyote Run into the regional dial-a-ride system.

Initial Customer Call Center Phasing Plan

There are currently six telephone numbers that a dial-a-ride customer might have to call to become an eligible customer, access information or schedule a trip. A graph of these telephone numbers by service provider and dial-a-ride functions is shown in Attachment C. The RTA Transit Working Group agreed upon three principles to guide discussion of single customer call center:

- Minimize disruption to passengers with disabilities
- Use an incremental approach in working towards one number
- Rely on existing technology as much as possible during initial stages of implementation

Based on the above principles and federal telephone wait-time performance requirements for the complementary ADA reservations, a three phase concept plan was developed as an initial starting point for further research and evaluation. The phasing plan integrates telephone numbers over time based on dial-a-ride functions rather than service provider. This three phase concept plan is shown in Attachment C.

Anticipated Implementation Schedule

Based on the recommendations above and upcoming renewal of service contracts, an initial implementation schedule is provided as follows:

Town of Oro Valley. As an initial step in the creation of a seamless regional dial-a-ride system, staff worked with the Town of Oro Valley to draft an amendment to the existing intergovernmental agreement for Sun Shuttle Dial-a-Ride Oro Valley, which would

merge the Town of Oro Valley's Coyote Run into the regional dial-a-ride system. This merging is cost neutral for the RTA by removing duplicative ADA trips, which are operated by Handi-car. The merging also allows for greater operational efficiencies for the Town of Oro Valley, which will help the Town sustain its senior transit services.

Under the current agreement, the RTA funds general public trips on the Sun Shuttle Dial-a-Ride Oro Valley. Under the proposed amendment, the RTA would also fund all regional ADA dial-a-ride trips originating in the Sun Shuttle Dial-a-Ride Oro Valley service area. The funding of expanded regional Special Needs Transit Service for Oro Valley is in accordance with the RTA's Administrative Code. At the Town's discretion, it will fund senior trips outside of the general public Sun Shuttle Dial-a-Ride Oro Valley zone. The Town of Oro Valley would agree to operate these services under the regional dial-a-ride service policies and regional system brand, eliminating the Coyote Run brand.

The amendment would also extend the term of the agreement until June 2013. At the end of this term, the services may be folded into the re-procurement of the RTA Special Needs Contract (see additional information below regarding this contract). At that time, the Town of Oro Valley could choose to submit a competitive bid for the Sun Shuttle Dial-a-Ride Oro Valley services or participate in the procurement selection panel for the Special Needs contractor.

It is anticipated that the amendment will be placed on the January 26 RTA Board meeting agenda for consideration. If the amendment is approved by the RTA Board and Oro Valley City Council, the merging of the Town of Oro Valley transit services into the regional dial-a-ride system would occur in February 2012.

RTA Special Needs Contract With Handi-car. Two one-year renewals of the RTA Special Needs Contract with Handi-car are available in February 2012 and could extend the contract until June 2014. Staff will be recommending to the RTA Board at the January 26 Board meeting that a 17-month renewal (terminating on June 30 of 2013) be approved. Staff will use the additional year to work with the Transit Working Group on developing a scope of work for competitive bids. It is anticipated that any approved regional dial-a-ride system objectives will be incorporated into the scope of work as requirements.

Recommendation:

The Transit Working Group recommends that the RTA TPC Committee approve the recommended regional dial-a-ride service policies and standards, the recommended regional branding of Coyote Run to Sun Shuttle Dial-a-ride, and subsequently pass along these recommendations to the Management Committee and RTA Board for further consideration.

Attachments:

- Attachment A – RTA Special Needs Transit Background
- Attachment B – Recommended Regional Dial-a-ride Service Policies and Standards
- Attachment C – Initial Call Center Phasing Plan

Attachment A

RTA Special Needs Transit Background

The Transit Element of the Regional Transportation Plan (RTP) approved by voters in 2006 includes funding of \$108.8 million (2006 dollars) over 20 years for expanded services for elderly and disabled citizens under Special Needs Transit Service category. The RTA Administrative Code, which was approved by the RTA Board in June 2006, provides a guiding document for the implementation of the RTP. The Administrative Code defined the Special Needs Transit Service as follows:

- Existing paratransit services to be expanded by 3.5% annually to meet future mobility needs of the elderly and disabled population.
- Support existing volunteer-based services for seniors.
- Four agencies receiving funding:
 - Van Tran (currently Sun Van)
 - Coyote Run
 - Pima Transit
 - Volunteer-based transport for seniors (Pima Council on Aging)

In June 2006, the RTA Board also adopted a Transit Element Policies, Objectives and Procedures (POP) which stated that the “RTA Board shall implement transit improvements with the goal of creating a seamless regional transit system.”

In July 2006, an intergovernmental agreement with the City of Tucson for extended Van Tran services was approved, followed by an agreement with Pima Council on Aging in January 2007 for volunteer-based senior transportation. An agreement with Pima County for special needs transit service in portions of unincorporated Pima County was approved in June 2008. The county residency requirement for Pima County special needs transit service was dropped in July 2009. Funding for Town of Oro Valley Coyote Run was not executed due to Oro Valley residency requirements for Coyote Run service.

In October 2008, the RTA Board directed staff to perform a regional paratransit system study. The Regional Paratransit System Plan (RPSP) was presented to the RTA Board in July 2009 with a recommendation to consolidate all dispatching, operations and provision of service, except Coyote Run, with Sun Van and to expand the service area after consolidation. The RTA Board voted to table the RPSP pending additional evaluation and discussion with affected organizations.

In January 2010, a paratransit task force of the Transit Working Group recommended a different approach than RPSP with nine recommendations:

- Expanding the service area
- Centralizing the call center
- Acquiring trapeze for Pima Transit Special Needs Service (under Handi-car contract)
- Moving Handi-car operations to paperless voucher system
- Implementing zone fares
- Eliminating the shared areas between Handi-car and Sun Van
- Extending Sun Van boundary to 1.5 miles around fixed routes
- Implementing a uniform regional fare
- Allowing 60 day customer transition period

Attachment A
RTA Special Needs Transit Background

In February 2010, Local Transportation Assistance Funding (LTAF) was eliminated by the State. In May 2010, Sun Shuttle Route 420 & 425 become Sun Shuttle Dial-a-ride Green Valley/Sahuarita and was open to general public ridership. In addition, the RTA Proposal for regionalizing transit services with the City of Tucson was suspended. In June 2010, the Town of Oro Valley agreed to fund Coyote Run due to the loss of LTAF for an additional year.

In January 2011, management of the Pima County Special Needs Service was transferred to the RTA. In February 2011, the RTA contracted with the Town of Oro Valley for Sun Shuttle Dial-a-ride service, which replaced the Sun Shuttle Route 402, for general public service. In June 2011, the Town of Oro Valley voted again to fund Coyote Run and formed a Council subcommittee to discuss with RTA potential regional solutions. In July 2011, fares were increased on the RTA (formerly Pima County) Special Needs service to match Sun Van fares.

Attachment B
Recommended Regional Dial-a-ride Service Policies and Standards

Eligibility

Eligible Trips	
Complementary ADA	Origin to destination trip provided to an ADA certified individual originating and ending within ¾ of a mile of a fixed-route (excluding commuter routes), during route operating hours
Optional ADA	Origin-to-destination trip provided to an ADA certified individual in optional ADA service area
Seniors	If funded by local agency, an origin-to-destination trip within the service area to anyone age 65 or older that is transit dependent
General Public Dial-a-Ride	An origin to destination trip within the service area to anyone

Eligibility Determination

Complementary ADA	Determined through City of Tucson Eligibility Office
Optional ADA	Determined through City of Tucson Eligibility Office
Seniors	Determined by the local jurisdiction providing the service, but must adhere to the Federal Transit Administration definition of a senior (age 65 and older)
General Public Dial-a-Ride	No eligibility requirements for general public dial-a-ride services

Days of Operation and Service Hours

Days of Operation

Complementary ADA	365 days a year
Optional ADA	365 days a year
Seniors	Monday - Friday, no weekend or holiday service
General Public Dial-a-Ride	Monday - Friday, no weekend or holiday service

Weekday Service Hours

Complementary ADA	Service hours match those of the comparable fixed route
Optional ADA	Sun Van - Service hours match those of the comparable fixed route All others - Weekdays 6 a.m. – 8 p.m.
Seniors	Weekdays 6 a.m. – 8 p.m.
General Public Dial-a-Ride	Weekdays 6 a.m. – 8 p.m.

Weekend Service Hours

Complementary ADA	Service hours match those of the comparable fixed route
Optional ADA	Sun Van - Service hours match those of the comparable fixed route All others - 9 a.m. - 6 p.m. Saturdays, Sunday and Holidays
Seniors	Does not operate on Saturday, Sunday or holidays
General Public Dial-a-Ride	Does not operate on Saturday, Sunday or holidays

Scheduling and Reservations

Trip Requests

Complementary ADA	Advanced Reservation - 1 to 7 days
Optional ADA	Advanced Reservation - 1 to 7 days
Seniors	Advanced Reservation - 1 to 7 days
General Public Dial-a-Ride	Advanced Reservation - 1 to 7 days

Attachment B
Recommended Regional Dial-a-ride Service Policies and Standards

Will Calls	
Complementary ADA	Will calls are available until 6 p.m.
Optional ADA	Will calls are available until 6 p.m.
Seniors	No will calls are accepted
General Public Dial-a-Ride	No will calls are accepted

Same Day Service	
Complementary ADA	Based on availability
Optional ADA	Based on availability
Seniors	Based on availability
General Public Dial-a-Ride	Based on availability

Days Reservations Can Be Made	
Complementary ADA	Daily
Optional ADA	Daily
Seniors	Monday - Friday
General Public Dial-a-Ride	Monday - Friday

Reservations Hours	
Complementary ADA	7 a.m. - 4 p.m.
Optional ADA	7 a.m. - 4 p.m.
Seniors	7 a.m. - 4 p.m.
General Public Dial-a-Ride	7 a.m. - 4 p.m.

Subscription Policy	
Complementary ADA	Yes, no trip purpose requirement, no more than 50% of all trips
Optional ADA	Yes, no trip purpose requirement, no more than 50% of all trips
Seniors	Yes, no trip purpose requirement, no more than 50% of all trips
General Public Dial-a-Ride	Yes, no trip purpose requirement, no more than 50% of all trips

Pick-up Window	
Complementary ADA	Pick-up Window - +15 to -15 mins of scheduled PU time
Optional ADA	Pick-up Window - +15 to -15 mins of scheduled PU time
Seniors	Pick-up Window - +15 to -15 mins of scheduled PU time
General Public Dial-a-Ride	Pick-up Window - +15 to -15 mins of scheduled PU time

Pick-up Negotiation	
Complementary ADA	Negotiation – Yes, within 1 hr. of requested time
Optional ADA	Negotiation – Yes, within 1 hr. of requested time
Seniors	Negotiation - Yes, no time restriction
General Public Dial-a-Ride	Negotiation - Yes, no time restriction

Trip Prioritization	
Complementary ADA	No trips are prioritized over others, first come-first served
Optional ADA	No trips are prioritized over others, first come-first served
Seniors	No trips are prioritized over others, first come-first served
General Public Dial-a-Ride	No trips are prioritized over others, first come-first served

Attachment B
Recommended Regional Dial-a-ride Service Policies and Standards

Trip Denials	
Complementary ADA	No denials permitted
Optional ADA	Trips are scheduled as reservations are received, denials are permitted
Seniors	Trips are scheduled as reservations are received, denials are permitted
General Public Dial-a-Ride	Trips are scheduled as reservations are received, denials are permitted

Fares	
Complementary ADA	Twice the regular fixed-route fare
Optional ADA	Twice the regular fixed-route fare
Seniors	Base fare twice the regular fixed-route fare, plus distance-based fare set as a multiple of the base (local funding agency discretion)
General Public Dial-a-Ride	Twice the regular fixed-route full fare

Fare Medium	
Complementary ADA	Voucherless fare system
Optional ADA	Voucherless fare system
Seniors	Cash, Sun Tran pass products or voucherless fare system
General Public Dial-a-Ride	Cash, Sun Tran pass products

Cancellations and No Shows	
No Show, Late, Cancellation Policy	
Complementary ADA	Vehicles arrive in window, make presence known, call dispatch, wait a minimum of 2 minutes
Optional ADA	Vehicles arrive in window, make presence known, call dispatch, wait a minimum of 2 minutes
Seniors	Vehicles arrive in window, make presence known, call dispatch, wait a minimum of 2 minutes
General Public Dial-a-Ride	Vehicles arrive in window, make presence known, call dispatch, wait a minimum of 2 minutes

Excessive No Show Definition	
Complementary ADA	3% of scheduled trips a warning letter is sent , 5% of trips results in a potential suspension with ability to appeal
Optional ADA	3% of scheduled trips a warning letter is sent , 5% of trips results in a potential suspension with ability to appeal
Seniors	3% of scheduled trips a warning letter is sent , 5% of trips results in a potential suspension with ability to appeal
General Public Dial-a-Ride	3% of scheduled trips a warning letter is sent , 5% of trips results in a potential suspension with ability to appeal

On-time Performance	
On-time Pick-up Standard	
Complementary ADA	95% of trips within pick-up window standard
Optional ADA	90% of trips within pick-up window standard
Seniors	90% of trips within pick-up window standard
General Public Dial-a-Ride	90% of trips within pick-up window standard

Attachment B
Recommended Regional Dial-a-ride Service Policies and Standards

On-Time Window (Will Calls)	
Complementary ADA	Will call Standard- Within 2 hours
Optional ADA	Will call Standard- Within 2 hours
Seniors	Will call Standard- Within 2 hours
General Public Dial-a-Ride	Will call Standard- Within 2 hours

On-Time Window (Drop Off)	
Complementary ADA	30 minutes before, to appointment time
Optional ADA	30 minutes before, to appointment time
Seniors	30 minutes before, to appointment time
General Public Dial-a-Ride	30 minutes before, to appointment time

On-Time Drop-Off Standard	
Complementary ADA	95% of trips within pick-up window standard
Optional ADA	95% of trips within pick-up window standard
Seniors	95% of trips within pick-up window standard
General Public Dial-a-Ride	95% of trips within pick-up window standard

Phone Service Standards	
Complementary ADA	Less than 2.5 min. wait-time
Optional ADA	Less than 2.5 min. wait-time
Seniors	Less than 2.5 min. wait-time
General Public Dial-a-Ride	Less than 2.5 min. wait-time

Operations Policies

Rider Assistance	
Complementary ADA	Origin-to-Destination
Optional ADA	Origin-to-Destination
Seniors	Origin-to-Destination
General Public Dial-a-Ride	Origin-to-Destination

No Strand Policy	
Complementary ADA	No one with a scheduled return or will call will be left stranded
Optional ADA	No one with a scheduled return or will call will be left stranded
Seniors	No one with a scheduled return or will call will be left stranded
General Public Dial-a-Ride	No one with a scheduled return or will call will be left stranded

Personal Care Attendant (PCA) Definition/Fare	
Complementary ADA	ADA definition of a PCA is used, a fare is not charged
Optional ADA	ADA definition of a PCA is used, a fare is not charged
Seniors	ADA definition of a PCA is used, a fare is not charged
General Public Dial-a-Ride	ADA definition of a PCA is used, a fare is not charged

Attachment B
Recommended Regional Dial-a-ride Service Policies and Standards

Package Limit Policy	
Complementary ADA	Up to 4 grocery bags
Optional ADA	Up to 4 grocery bags
Seniors	Up to 4 grocery bags
General Public Dial-a-Ride	Up to 4 grocery bags

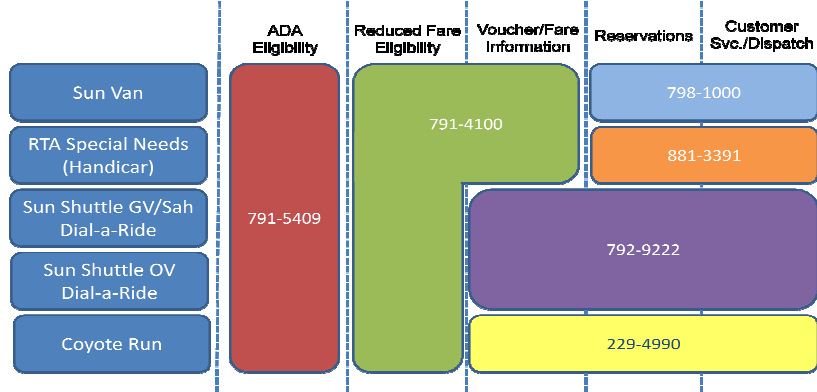
Scheduled Max Ride Time	
Complementary ADA	Comparable fixed route trip, plus 10%
Optional ADA	2 hours
Seniors	2 hours
General Public Dial-a-Ride	90 minutes

Suspension and Appeal	
Service Suspension Policy	
Complementary ADA	Unsafe, violent, seriously disruptive, or illegal conduct. Involuntary behavior resulting solely from a disability will not result in suspension.
Optional ADA	Unsafe, violent, seriously disruptive, or illegal conduct. Involuntary behavior resulting solely from a disability will not result in suspension.
Seniors	Unsafe, violent, seriously disruptive, or illegal conduct. Involuntary behavior resulting solely from a disability will not result in suspension.
General Public Dial-a-Ride	Unsafe, violent, seriously disruptive, or illegal conduct. Involuntary behavior resulting solely from a disability will not result in suspension.

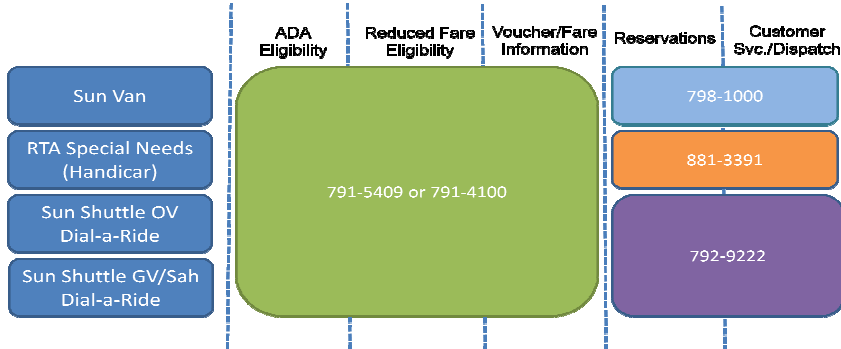
Appeal Procedure	
Complementary ADA	Written notification, 60 days to appeal to ADA Appeals Coordinator
Optional ADA	Written notification, 60 days to appeal to ADA Appeals Coordinator
Seniors	Written notification, 60 days to appeal to mobility manager, or contracting agency
General Public Dial-a-Ride	Written notification, 60 days to appeal to mobility manager, or contracting agency

Attachment C Call Center Phasing Plan

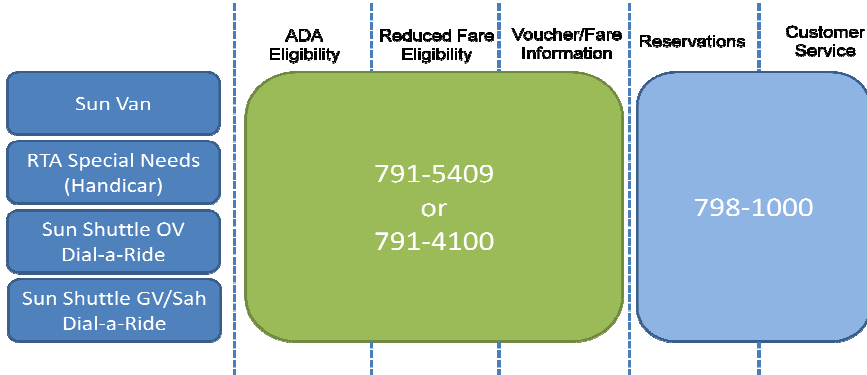
Current Dial-a-ride Telephone Numbers



Phase One Dial-a-ride Customer Call Center



Phase Two Dial-a-ride Customer Call Center



Phase Three Dial-a-ride Customer Call Center

