

**LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY**  
**1362 Rutan Court, Suite 100**  
**Livermore, CA 94551**

**PROJECTS and SERVICES COMMITTEE MEETING / COMMITTEE OF THE**  
**WHOLE**

**COMMITTEE MEMBERS**

|                                   |                          |
|-----------------------------------|--------------------------|
| <b>SCOTT HAGGERTY – CHAIR</b>     | <b>KARLA BROWN</b>       |
| <b>DAVID HAUBERT – VICE CHAIR</b> | <b>STEVEN SPEDOWFSKI</b> |

**DATE:** Monday, June 27, 2016

**PLACE:** Diana Lauterbach Room LAVTA Offices  
1362 Rutan Court, Suite 100, Livermore

**TIME:** 4:00p.m.

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**AGENDA**

- 1. Call to Order and Pledge of Allegiance**
- 2. Roll Call of Members**
- 3. Meeting Open to Public**
  - Members of the audience may address the Committee on any matter within the general subject matter jurisdiction of the LAVTA Board of Directors.
  - Members of the audience may address the Committee on items on the Agenda at the time the Chair calls for the particular Agenda item.
  - Public comments should not exceed three (3) minutes.
  - Agendas are published 72 hours prior to the meeting.
  - No action may be taken on matters raised that are not on the Agenda.
- 4. Minutes of the May 23, 2016 Meeting of the P&S Committee.**

**Recommendation:** Approval
- 5. LAVTA Risk Management Update**

**Recommendation:** None – information only.
- 6. Paratransit Operating Policy Change**

**Recommendation:** Endorse and forward to the Board of Directors for approval.
- 7. Alameda County – Affordable Student Transit Pass Program**

**Recommendation:** None – information only

**8. Management Action Plan**

**Recommendation:** None – information only

**9. Preview of Upcoming P&S Committee Agenda Items**

**10. Matters Initiated by Committee Members**

**11. Next Meeting Date is Scheduled for: July 25, 2016**

**12. Adjourn**

Please refrain from wearing scented products (perfume, cologne, after-shave, etc.) to these meetings, as there may be people in attendance susceptible to environmental illnesses.

In the event that a quorum of the entire Board is present, this Committee shall act as a Committee of the Whole. In either case, any item acted upon by the Committee or the Committee of the Whole will require consideration and action by the full Board of Directors as a prerequisite to its legal enactment.

*I hereby certify that this agenda was posted 72 hours in advance of the noted meeting.*

|   |                |
|---|----------------|
| <u>/s/ Jennifer Suda</u>                        | <u>6/22/16</u> |
| <u>LAVTA Administrative Services Department</u> | <u>Date</u>    |

*On request, the Livermore Amador Valley Transit Authority will provide written agenda materials in appropriate alternative formats, or disability-related modification or accommodation, including auxiliary aids or services, to enable individuals with disabilities to participate in public meetings. A written request, including name of the person, mailing address, phone number and brief description of the requested materials and preferred alternative format or auxiliary aid or service should be sent at least seven (7) days before the meeting. Requests should be sent to:*

*Executive Director  
Livermore Amador Valley Transit Authority  
1362 Rutan Court, Suite 100  
Livermore, CA 94551  
Fax: 925.443.1375  
Email : [frontdesk@lavta.org](mailto:frontdesk@lavta.org)*

**AGENDA**

**ITEM 4**



**LIVERMORE AMADOR VALLEY TRANSIT AUTHORITY**  
**1362 Rutan Court, Suite 100**  
**Livermore, CA 94551**

**PROJECTS and SERVICES COMMITTEE MEETING / COMMITTEE OF THE**  
**WHOLE**

**COMMITTEE MEMBERS**

|                                   |                          |
|-----------------------------------|--------------------------|
| <b>SCOTT HAGGERTY – CHAIR</b>     | <b>KARLA BROWN</b>       |
| <b>DAVID HAUBERT – VICE CHAIR</b> | <b>STEVEN SPEDOWFSKI</b> |

**DATE:** Monday, May 23, 2016

**PLACE:** Diana Lauterbach Room LAVTA Offices  
1362 Rutan Court, Suite 100, Livermore

**TIME:** 4:00p.m.

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**MINUTES**

**1. Call to Order and Pledge of Allegiance**

Committee Chair Scott Haggerty called the meeting to order at 4:01pm.

**2. Roll Call of Members**

**Members Present**

Scott Haggerty, Supervisor, Alameda County  
Steven Spedowfski, Councilmember, City of Livermore  
Karla Brown, Councilmember, City of Pleasanton  
Don Biddle, Councilmember, City of Dublin

**Members Absent**

David Haubert, Mayor, City of Dublin

**3. Meeting Open to Public**

Robert S. Allen

Robert Allen addressed the Committee requesting a bus between Park-N-Ride and the Dublin/Pleasanton BART station. This is to help avoid excessive crowding at the BART parking lot, so people in Pleasanton have good parking as well. Mr. Allen asked the Committee what the Park-N-Ride study will address. Staff explained that the Alameda County Transportation Commission is conducting the Park-N-ride study currently and that results should be in at the end of the year. Mr. Allen's proposal for fifteen minute bus service at this location is being considered.

Richard Fierro

Richard Fierro with Teamsters, Local 70 addressed the Committee on Agenda Item

8. Mr. Fierro spoke in opposition of TNCs, providing the following reasoning: First, Teamsters, Local 70 represent the Drivers of MV Transportation who currently do this work. They would like to increase and keep this work. Secondly, they feel it is bad public policy to use tax payer money to finance these TNC operations. TNCs operate as the middle man with no responsibility and have lawsuits that are not treating their driver's with fairness. Mr. Fierro also mentioned AB 2293 which Teamsters, Local 70 helped sponsor requiring Uber or Lyft to tell the driver's how much insurance is required, but it is not mandated that they carry it. If the driver's do not carry the mandated insurance amount there is no real penalty. The driver's that would be contracted with TNCs have no Department of Transportation (DOT) requirements like medical cards, drug testing, and background checks. All these requirements and others are met by MV drivers. Mr. Fierro believes that the traditional business model works and would like to see if alternative solutions could be looked into further. Mr. Fierro requested that Wheels on Demand does not go forward and more discussions take place.

#### **4. Minutes of the April 25, 2016 Meeting of the P&S Committee.**

Approved: Brown/Biddle

Aye: Brown, Biddle, Haggerty, Spedowski

No: None

Abstain: None

Absent: Haubert

#### **5. Third Quarter 2016 Marketing and Outreach Activities**

Staff provided an update on the 3rd Quarter Marketing and Outreach activities and a preview of upcoming events.

Councilmember Karla Brown asked staff about the outreach for the Livermore Wine Festival. Staff explained that it went well and that we shared a booth with the City of Livermore and that increased the traffic to the booth. In the future LAVTA plans to partner with the City of Livermore again. Councilmember Karla Brown also wanted to know if the outreach is effective and providing LAVTA with new bus riders. Staff said that we are not sure if we are generating ridership, but our booth did generate many questions and curiosity regarding the COA changes. LAVTA plans to measure marketing dollars and time spent on outreach events moving forward, so it is more effective.

This item was informational only.

#### **6. FY 2016 3rd Quarter Report – Operations**

Staff provided information on the 3<sup>rd</sup> Quarter FY2016 (January – March) Operation statistics. Discussed was the fixed route, paratransit, and operational performance metrics. LAVTA had a 0.6% decrease of ridership in the third quarter. LAVTA is expecting a reversal of this downward trend in ridership after the COA changes are implemented in August 2016. On-time performance increased slightly to 81.8%. Paratransit increased by 0.04% for passengers and increased 16.88% for number of trips. LAVTA's fixed route contractor recorded 10 accidents in the 3<sup>rd</sup> quarter,

seven were determined preventable, and three deemed non-preventable. Four accidents resulted in major damage, six with minor damage, and one resulted in bodily injury. Complaints were higher in the 3<sup>rd</sup> quarter, largely due to planning requests, rather complaints regarding service being delivered. Paratransit had a marked increase in valid complaints.

Councilmember Karla Brown requested that LAVTA staff bring back a report regarding accidents that compares past years and industry standards. Ms. Brown also requested an analysis of paratransit passengers versus the number of trips.

This item was informational only.

## **7. Wheels Forward - East Livermore Service Recommendations**

Staff provided information to the Project and Services Committee of the express service to the Lawrence Livermore National Laboratory (LLNL). The Projects and Services Committee forwarded and recommended that the Board approve the service changes recommended as a part of this staff report, and recommends the Board to authorize staff to file a Notice of Exemption under the California Environmental Quality Act (CEQA)

Approved: Spedowfski/Biddle  
Aye: Brown, Biddle, Haggerty, Spedowfski  
No: None  
Abstain: None  
Absent: Haubert.

## **8. Wheels on Demand Demonstration Project**

Executive Director Michael Tree presented the Wheels on Demand demonstration project to the Project and Services Committee and provided questions and answers that were raised by the Board. Wheels on Demand would operate in two project areas of Dublin. There would be no direct contractual relationship between the taxi companies or the TNC. Under federal transportation rules, if there is no contract between Wheels and the operator, no drug testing requirements apply. Since there would not be a contract with the providers, many of the issues relating to safety and liability would be governed by the agencies that regulate the particular provider (for taxis, the individual cities, for TNCs, the Public Utilities Commission).

Councilmember Steven Spedowfski thinks that Wheels on Demand is an innovative idea, but is nervous about utilizing TNCs and would like them to be held to higher standards.

Councilmember Karla Brown shares Councilmember Spedowfski's concerns regarding TNCs. Councilmember Brown would like to utilize taxi cabs only versus TNCs. Michael Tree responded that LAVTA would like to consider TNCs, due to the technology difference.

Supervisor Scott Haggerty does not want to leave Dublin without service and suggested that LAVTA restore the service until something is decided on.

Supervisor Haggerty is not prepared to approve Wheels on Demand.

The Projects and Services Committee forwarded the Wheels On Demand project to the Board with no recommendation.

Approved: Biddle/Spedowfski  
Aye: Brown, Biddle, Haggerty, Spedowfski  
No: None  
Abstain: None  
Absent: Haubert

Supervisor Scott Haggerty departed the Project and Services Meeting at 5:12pm.

## **9. FY 2017 Marketing Plan**

Staff provided the Projects and Services Committee with the fiscal year 2017 Wheels Marketing Plan. FY 2017 marketing plan was developed in conjunction with the approved Wheels Forward system changes. The plan includes seven target market initiatives that focus on the goal of increasing ridership.

Executive Director Michael Tree expressed that Los Positas College Easy Pass will cost LAVTA \$80,000 in foregone fares for one year and that they received \$20,000 of partnership funds from the students to offset the cost. In the future the students would approve/pass a fee to continue funding the easy pass. Councilmember Steven Spedowfski thinks that this is a great idea and he will look into other partnerships to offset the cost.

The Project and Services Committee endorsed and forwarded to the Board of Directors for approval.

Approved: Brown/Spedowfski  
Aye: Brown, Biddle, Spedowfski  
No: None  
Abstain: None  
Absent: Haubert, Haggerty

Councilmember Steven Spedowfski departed the Project and Services Meeting at 5:29pm.

## **10. Management Action Plan**

Michael Tree included a Management Action Plan for the Project and Services to review. Mr. Tree requested input from the Committee regarding limiting the exterior bus advertising to 50%, excluding buses that will be retiring in one year. Councilmember Karla Brown requested that the marketing be placed below the windows and that Wheels rebranding is above the windows. Councilmember Brown asked if the rewrap cost could be paid for by the marketing firm. Staff responded that currently LAVTA does a cost sharing of 50/50 split, and that the suggestion would be a point of negotiation.

This was an information item only.

**11. Preview of Upcoming P&S Committee Agenda Items**

**12. Matters Initiated by Committee Members**

None.

**13. Next Meeting Date is Scheduled for: June 27, 2016**

**14. Adjourn**

Meeting adjourned 5:37pm.

**AGENDA**

**ITEM 5**



**S T A F F   R E P O R T**

SUBJECT: LAVTA Risk Management Update

FROM: Beverly Adamo, Director of Administrative Services

DATE: June 27, 2016

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**Action Requested**  
Information only.

**Background**

At the Projects and Services Committee meeting held on May 23, 2016, the Quarterly Operations Update was provided to the Committee that included information regarding the number of accidents and claims paid during the third quarter of FY16. During this report, Councilmember Karla Brown requested that LAVTA staff bring back a report regarding accidents that compares past years and industry standards.

**Discussion**

In April 2000 LAVTA joined California Transit Indemnity Pool (CalTIP), for the purpose of pooling with other transit agencies throughout the state to provide liability and physical damage insurance. Each year, LAVTA receives a Risk Profile Report, and the most recent is included as Attachment 1. The format of the exhibits in this report allows LAVTA to compare our performance to CalTIP peers and to CalTIP as a pool. This is an annual report that was issued in March 2016, and includes program years from FY11 through FY15.

The question was also asked regarding the dollar amount of claims paid to date during FY16. Of the total \$83,332.80 that has been paid during the first ten months of FY16, only \$19,648.07 was paid for occurrences that happened during FY16. The breakdown is as follows:

| Actual Date of Occurrence | Total Paid in FY15<br>(12 months of data) | Total Paid in FY16<br>(10 months of data) |
|---------------------------|---|---|
| FY12                      | \$6,614.11                                | \$7,235.25                                |
| FY13                      | \$134.94                                  | 0   |
| FY14                      | \$36,471.58                               | \$12,009.31                               |
| FY15                      | \$19,327.76                               | \$44,440.17                               |
| FY16                      | N/A                                       | \$19,648.07                               |
| <b>TOTAL</b>              | <b>\$62,548.39</b>                        | <b>\$83,332.80</b>                        |

**Recommendation**  
Information only.

Attachment

- 1) CalTIP Risk Profile Report



# RISK PROFILE

*The 2016 Risk Profile is based on claims data valued @November 30, 2015 and covers program years from 2010/11 through 2014/15*

**March 2016**

# About This Report

The Risk Profile Report is a compilation of exhibits that illustrate various loss trends of the California Transit Indemnity Pool (CalTIP) and its members. This information is used to help develop targeted risk control services to address the risk factors contributing to these loss trends.

The exhibits provide insight about the frequency and severity of losses for individual members as well as the overall frequency and severity averages of the pool. While the format of the exhibits allows members to compare their performance to their CalTIP peers and to CalTIP as a pool, the report is not intended to be used as a punitive tool for those members performing worse than the CalTIP average or worse than any other members.

The loss data used in developing the Risk Profile Report consists of general and auto liability claims valued as of November 30, 2015, for the program years 2010/11 through 2014/15. Certified annual mileage and experience modification factors for same program years are also used for comparisons. The exhibits take into account the following assumptions:

- Incurred losses are capped at the \$1 million CalTIP self-insured retention.
- Occurrences with zero incurred are included in the occurrence count.

Exhibits identifying cause of loss are categorized according to the Public Risk Database Project's (PRDP) loss codes. The data for these exhibits is limited to data provided by York Risk Services Group, Inc. (York) for all Program I and some Program II members. If a Program II member contracts directly with York or a claim exceeding its self-insured retention has been reported to York, these claims are included in the PRDP exhibits. York implemented the PRDP coding process as a condition of the contract with CalTIP. For more information on the PRDP loss coding structure, refer to Appendix - A. For a complete list of definitions, refer to Appendix - B.

This report has been prepared solely for the internal use of CalTIP as a guide in determining risk factors and future risk control services. The supporting data, analysis, descriptions, exhibits, and appendices herein are not necessarily suitable for any other purpose. For questions and comments, please contact Jeff Johnston, Director of Risk Control, **Bickmore** at (800) 541-4591, ext. 1125.

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# Mileage

## Total Mileage by Member

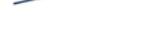
Total mileage is the sum of revenue vehicle and non-revenue vehicle miles. Revenue vehicle mileage is miles operated or driven by revenue vehicles (i.e., buses or passenger vans). Non-revenue vehicle mileage is miles operated or driven by non-revenue vehicles, meaning any car or service truck.

| MEMBER              | 10/11             | 11/12             | 12/13             | 13/14             | 14/15             | TOTAL ALL YEARS    |  |
|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------------|--|
| Amador              | 229,275           | 237,521           | 234,037           | 248,595           | 259,957           | 1,209,385          |  |
| Arcata              | 120,420           | 172,100           | 173,400           | 107,304           | 107,500           | 680,724            |  |
| Auburn              | 60,793            | 61,716            | 62,711            | 64,270            | 65,814            | 315,304            |  |
| Azusa               | 115,499           | 115,839           | 102,868           | 111,872           | 217,927           | 664,005            |  |
| CCCTA               | 3,265,411         | 3,290,011         | 4,268,408         | 3,384,235         | 3,433,510         | 17,641,575         |  |
| Culver City         | 1,742,745         | 1,759,763         | 1,880,869         | 1,805,635         | 1,811,375         | 9,000,387          |  |
| Dixon               | 83,576            | 87,944            | 82,585            | 89,861            | 95,867            | 439,833            |  |
| El Dorado           | 1,328,318         | 1,388,723         | 1,339,612         | 1,196,962         | 1,300,674         | 6,554,289          |  |
| Folsom              | 191,540           | 194,121           | 191,778           | 182,661           | 145,017           | 905,117            |  |
| Gold Coast          | 1,979,568         | 2,104,397         | 2,183,361         | 2,380,305         | 2,486,320         | 11,133,951         |  |
| Golden Empire       | 4,584,877         | 4,685,566         | 4,368,777         | 4,890,578         | 3,972,446         | 22,502,244         |  |
| Humboldt            | 1,200,953         | 1,173,191         | 1,212,676         | 1,292,516         | 1,296,655         | 6,175,991          |  |
| Lincoln             | 115,083           | 109,834           | 101,656           | 100,518           | 103,784           | 530,875            |  |
| Livermore           | 2,381,140         | 2,424,358         | 2,325,925         | 2,284,645         | 2,284,895         | 11,700,963         |  |
| Lodi                | 305,372           | 351,430           | 338,257           | 361,398           | 386,253           | 1,742,710          |  |
| Mendocino           | 771,843           | 750,022           | 742,464           | 734,205           | 765,633           | 3,764,167          |  |
| Monterey-Salinas    | 3,912,154         | 4,224,962         | 3,799,785         | 3,551,311         | 3,890,476         | 19,378,688         |  |
| Morongo             | 740,020           | 785,504           | 790,626           | 832,776           | 792,330           | 3,941,256          |  |
| Nevada              | 256,604           | 253,999           | 266,733           | 289,456           | 327,036           | 1,393,828          |  |
| Omnitrans           | 12,728,288        | 13,011,421        | 12,978,359        | 12,326,184        | 12,099,414        | 63,143,666         |  |
| Placer              | 1,643,977         | 1,574,626         | 1,553,781         | 1,367,881         | 1,344,753         | 7,485,018          |  |
| Porterville         | 379,323           | 374,876           | 424,588           | 647,252           | 665,729           | 2,491,768          |  |
| Riverside           | 5,423,648         | 5,589,064         | 6,014,737         | 6,156,958         | 6,782,026         | 29,966,433         |  |
| San Luis Obispo     | 1,738,343         | 2,051,525         | 2,110,033         | 2,143,335         | 2,179,191         | 10,222,427         |  |
| Santa Cruz          | 4,697,597         | 4,097,455         | 4,652,447         | 5,114,453         | 5,032,075         | 23,594,027         |  |
| Santa Rosa          | 1,235,892         | 1,203,993         | 1,172,572         | 1,069,177         | 1,039,082         | 5,720,716          |  |
| Siskiyou            | 473,572           | 495,325           | 524,967           | 523,376           | 527,237           | 2,544,477          |  |
| South County        | 249,749           | 239,957           | 214,827           | 225,893           | 243,634           | 1,174,060          |  |
| Tahoe               | 157,441           | 923,420           | 904,667           | 878,736           | 811,714           | 3,675,978          |  |
| Vacaville           | 465,033           | 572,994           | 605,785           | 550,172           | 619,018           | 2,813,002          |  |
| WCCTA               | 1,897,752         | 1,919,766         | 1,878,491         | 1,899,708         | 1,893,478         | 9,489,195          |  |
| Whittier            | 221,039           | 228,494           | 242,846           | 236,262           | 235,519           | 1,164,160          |  |
| Yolo                | 2,558,284         | 2,547,012         | 2,556,066         | 2,696,654         | 2,787,859         | 13,145,875         |  |
| <b>CalTIP Total</b> | <b>57,255,129</b> | <b>59,000,929</b> | <b>60,300,694</b> | <b>59,745,144</b> | <b>60,004,198</b> | <b>296,306,094</b> |  |

SOURCE - CalTIP annual mileage certification survey results.

## Experience Modification Factors - Rural

Experience modifications factors (Xmods) are designed to adjust your CalTIP contributions up or down based on whether your historical claim results have been better or worse than the CalTIP average. Xmods below 1.00 indicate better than average experience. Xmods above 1.00 indicate worse than average experience.

| MEMBER          | 10/11 | 11/12 | 12/13 | 13/14 | 14/15 |   |
|-----------------|-------|-------|-------|-------|-------|---|
| Amador          | 0.51  | 0.76  | 0.84  | 0.93  | 0.73  |    |
| Arcata          | 0.61  | 0.85  | 0.89  | 0.79  | 0.78  |    |
| Auburn          | 0.57  | 0.66  | 0.71  | 0.76  | 0.75  |    |
| Dixon           | 0.57  | 0.66  | 0.71  | 0.76  | 0.75  |    |
| El Dorado       | 0.39  | 0.49  | 0.56  | 0.67  | 0.77  |    |
| Folsom          | 0.50  | 0.77  | 0.87  | 1.09  | 0.89  |    |
| Humboldt        | 0.66  | 0.58  | 0.60  | 0.66  | 0.66  |    |
| Lincoln         | 0.56  | 0.67  | 0.90  | 0.95  | 0.93  |    |
| Mendocino       | 0.44  | 0.47  | 0.64  | 0.72  | 0.73  |    |
| Morongo         | 0.63  | 0.77  | 0.60  | 0.65  | 0.64  |    |
| Nevada          | 0.51  | 0.56  | 0.62  | 0.72  | 0.70  |    |
| Placer          | 0.55  | 0.55  | 0.66  | 0.65  | 0.63  |    |
| San Luis Obispo | 0.51  | 0.63  | 0.74  | 0.78  | 0.88  |    |
| Siskiyou        | 0.45  | 0.56  | 0.59  | 0.66  | 0.62  |   |
| South County    | 0.54  | 0.62  | 0.65  | 0.74  | 0.72  |  |
| Tahoe           | 0.59  | 0.68  | 0.74  | 0.79  | 0.89  |  |

SOURCE - CalTIP experience modification factors calculated by Aon.

## Experience Modification Factors - All Other

Experience modifications factors (Xmods) are designed to adjust your CalTIP contributions up or down based on whether your historical claim results have been better or worse than the CalTIP average. Xmods below 1.00 indicate better than average experience. Xmods above 1.00 indicate worse than average experience.

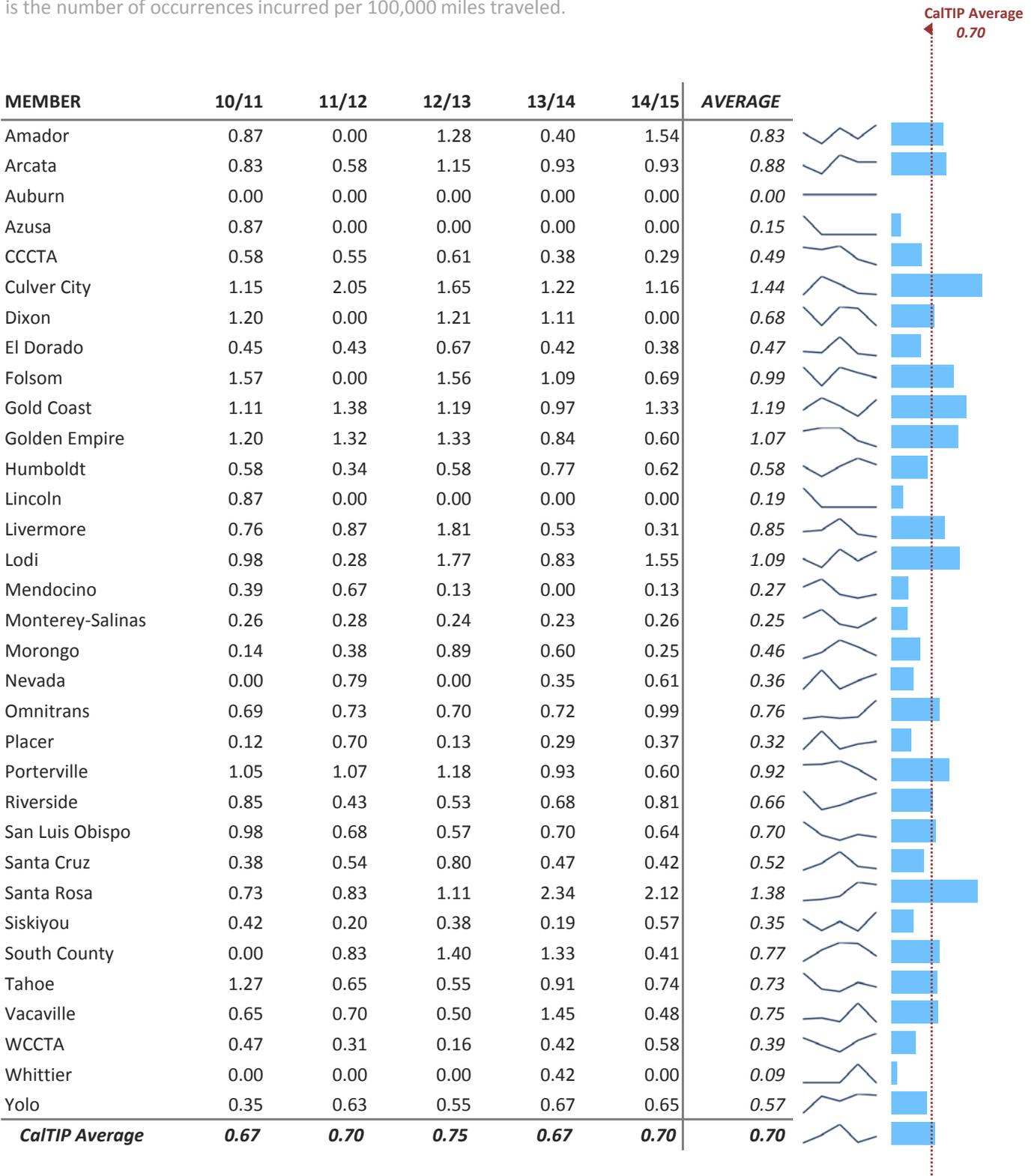
| MEMBER           | 10/11 | 11/12 | 12/13 | 13/14 | 14/15 |  |
|------------------|-------|-------|-------|-------|-------|--|
| Azusa            | 1.03  | 1.01  | 1.04  | 1.11  | 1.20  |  |
| CCCTA            | 0.82  | 0.74  | 0.73  | 0.75  | 0.78  |  |
| Culver City      | 1.55  | 1.47  | 1.80  | 1.78  | 1.26  |  |
| Gold Coast       | 1.56  | 1.50  | 1.69  | 1.16  | 1.27  |  |
| Golden Empire    | 1.09  | 1.24  | 1.16  | 1.27  | 1.34  |  |
| Livermore        | 1.17  | 1.00  | 0.94  | 0.97  | 1.10  |  |
| Lodi             | 1.17  | 1.06  | 0.94  | 0.94  | 0.95  |  |
| Monterey-Salinas | 0.67  | 0.64  | 0.71  | 0.72  | 0.64  |  |
| Omnitrans        | 1.24  | 1.17  | 1.14  | 1.09  | 1.13  |  |
| Porterville      | 1.07  | 1.04  | 1.10  | 1.19  | 1.22  |  |
| Riverside        | 1.05  | 1.01  | 1.02  | 0.96  | 1.29  |  |
| Santa Cruz       | 0.72  | 0.90  | 0.80  | 0.91  | 0.83  |  |
| Santa Rosa       | 0.87  | 0.81  | 1.02  | 1.04  | 1.05  |  |
| Vacaville        | 0.93  | 0.94  | 0.95  | 1.00  | 0.89  |  |
| WCCTA            | 0.95  | 1.05  | 1.01  | 1.10  | 0.94  |  |
| Whittier         | 1.36  | 1.14  | 0.97  | 0.95  | 0.94  |  |
| Yolo             | 1.10  | 1.03  | 1.13  | 1.11  | 0.93  |  |

SOURCE - CalTIP experience modification factors calculated by Aon.

# Frequency

Number of Occurrences per 100,000 Miles

Frequency is the number of occurrences experienced per mile traveled. It is determined by taking the occurrence count divided by the miles traveled, multiplied by 100,000. The result is the number of occurrences incurred per 100,000 miles traveled.



NOTE - The overall averages (i.e., last row and last column) are weighted. That is, they are based on the total claims and mileage for all years for all members. They are not calculated by taking an average of the yearly frequencies shown above.

# Loss Rate

## Incurring Losses per 100,000 Miles

Loss rate is the cost incurred per mile traveled. It is determined by taking the incurred losses (paid losses plus reserves) divided by the miles traveled, multiplied by 100,000. The result is a dollar amount of incurred losses per 100,000 miles traveled.

CalTIP Average  
\$ 11,286

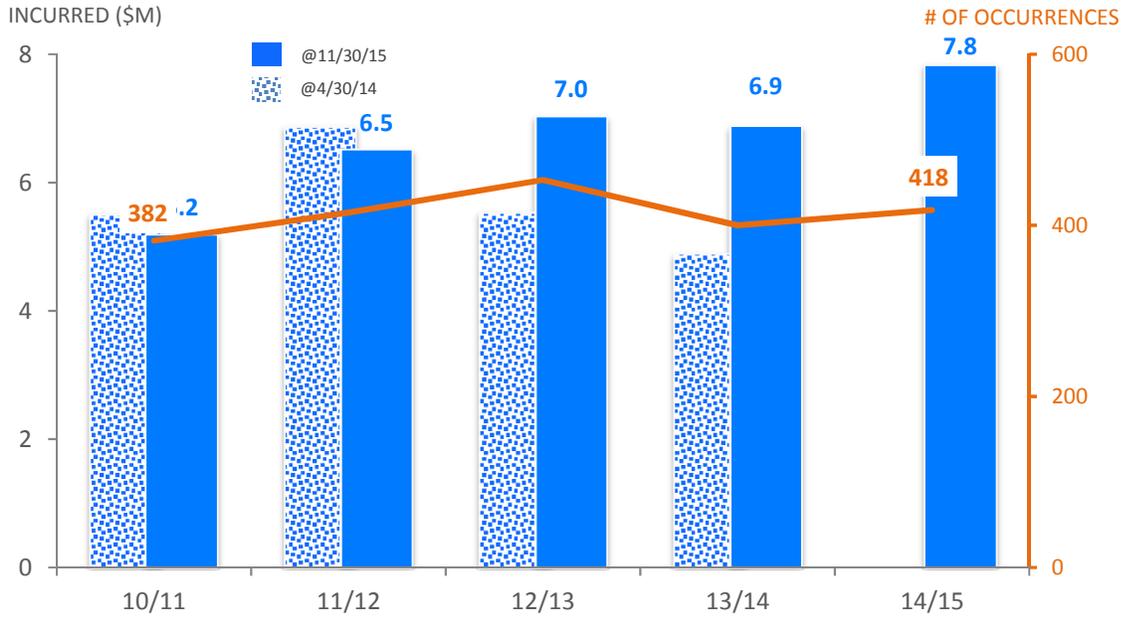
| MEMBER                | 10/11           | 11/12            | 12/13            | 13/14            | 14/15            | AVERAGE          |  |
|-----------------------|-----------------|------------------|------------------|------------------|------------------|------------------|--|
| Amador                | \$ 4,387        | \$ 0             | \$ 1,779         | \$ 518           | \$ 111,727       | \$ 25,298        |  |
| Arcata                | 187             | 4,043            | 2,665            | 1,350            | 969              | 2,100            |  |
| Auburn                | 0               | 0                | 0                | 0                | 0                | 0                |  |
| Azusa                 | 191,461         | 0                | 0                | 0                | 0                | 33,303           |  |
| CCCTA                 | 4,475           | 6,353            | 3,339            | 31,005           | 2,706            | 9,295            |  |
| Culver City           | 3,109           | 6,756            | 37,731           | 17,619           | 2,563            | 13,858           |  |
| Dixon                 | 596             | 0                | 2,396            | 1,790            | 0                | 929              |  |
| El Dorado             | 2,007           | 3,910            | 3,600            | 2,574            | 16,298           | 5,675            |  |
| Folsom                | 489             | 0                | 695,534          | 2,880            | 269              | 148,099          |  |
| Gold Coast            | 4,368           | 22,892           | 11,099           | 13,223           | 50,694           | 21,427           |  |
| Golden Empire         | 4,943           | 14,679           | 2,899            | 2,911            | 3,048            | 5,797            |  |
| Humboldt              | 2,841           | 3,552            | 979              | 2,427            | 26,188           | 7,425            |  |
| Lincoln               | 44,436          | 0                | 0                | 0                | 0                | 9,633            |  |
| Livermore             | 6,392           | 1,421            | 5,926            | 12,440           | 1,866            | 5,566            |  |
| Lodi                  | 1,732           | 1,006            | 1,554            | 5,719            | 18,415           | 6,076            |  |
| Mendocino             | 27,329          | 1,300            | 292              | 0                | 197              | 5,960            |  |
| Monterey-Salinas      | 7,916           | 1,416            | 1,462            | 24,395           | 1,385            | 6,942            |  |
| Morongo               | 277             | 733              | 3,811            | 1,312            | 823              | 1,405            |  |
| Nevada                | 0               | 3,808            | 0                | 0                | 1,376            | 1,017            |  |
| Omnitrans             | 8,076           | 7,164            | 21,483           | 16,881           | 21,846           | 15,001           |  |
| Placer                | 822             | 3,155            | 28               | 224              | 9,765            | 2,646            |  |
| Porterville           | 26,017          | 9,405            | 2,581            | 4,034            | 757              | 7,065            |  |
| Riverside             | 11,241          | 21,634           | 15,118           | 19,258           | 5,031            | 14,199           |  |
| San Luis Obispo       | 3,089           | 52,333           | 1,142            | 6,893            | 9,916            | 14,823           |  |
| Santa Cruz            | 12,579          | 2,946            | 2,005            | 503              | 18,404           | 7,445            |  |
| Santa Rosa            | 3,601           | 12,407           | 2,973            | 3,827            | 383              | 4,783            |  |
| Siskiyou              | 372             | 704              | 491              | 403              | 7,339            | 1,911            |  |
| South County          | 0               | 14,818           | 1,198            | 7,552            | 4,002            | 5,531            |  |
| Tahoe                 | 14,383          | 4,968            | 24,423           | 12,615           | 26,751           | 16,797           |  |
| Vacaville             | 1,544           | 1,400            | 380              | 2,592            | 3,848            | 1,976            |  |
| WCCTA                 | 54,236          | 54,292           | 519              | 1,453            | 1,085            | 22,441           |  |
| Whittier              | 0               | 0                | 0                | 75               | 0                | 15               |  |
| Yolo                  | 5,933           | 3,321            | 2,955            | 4,282            | 25,436           | 8,645            |  |
| <b>CalTIP Average</b> | <b>\$ 9,065</b> | <b>\$ 11,039</b> | <b>\$ 11,661</b> | <b>\$ 11,509</b> | <b>\$ 13,050</b> | <b>\$ 11,286</b> |  |

NOTE - The overall averages (i.e., last row and last column) are weighted. That is, they are based on the incurred losses and mileage for all years for all members. They are not calculated by taking an average of the yearly severities shown above.

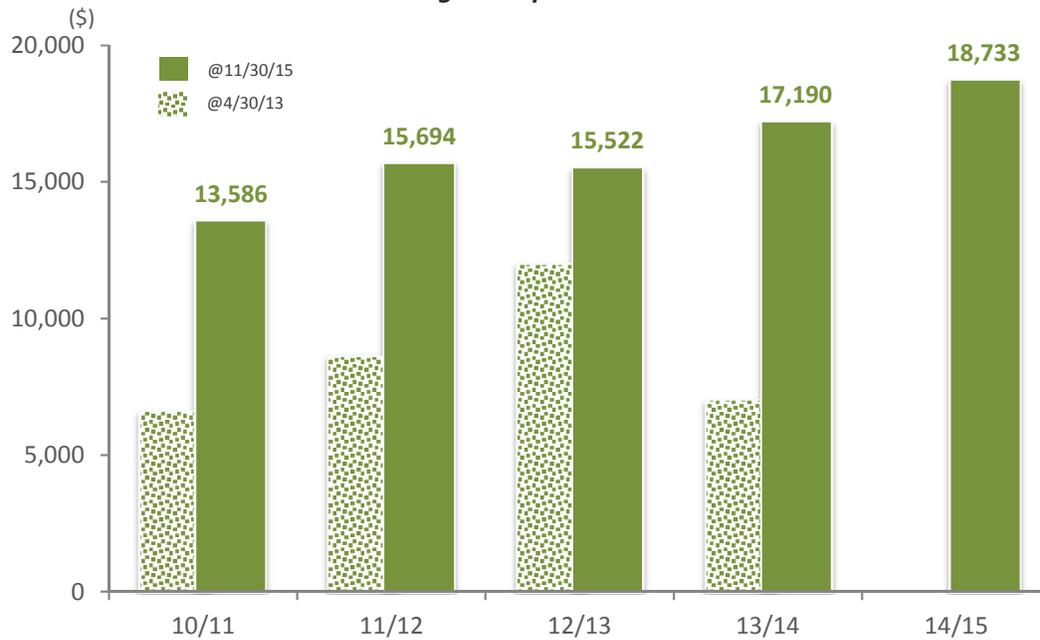
# Incurred Losses, Number of Occurrences, and Average Cost per Occurrence (All CalTIP Members Combined)

Incurred losses are capped at \$1 million per occurrence. Claims with zero incurred are included. Average cost per occurrence is the incurred losses divided by number of occurrences.

**Incurred Losses and Number of Occurrences**



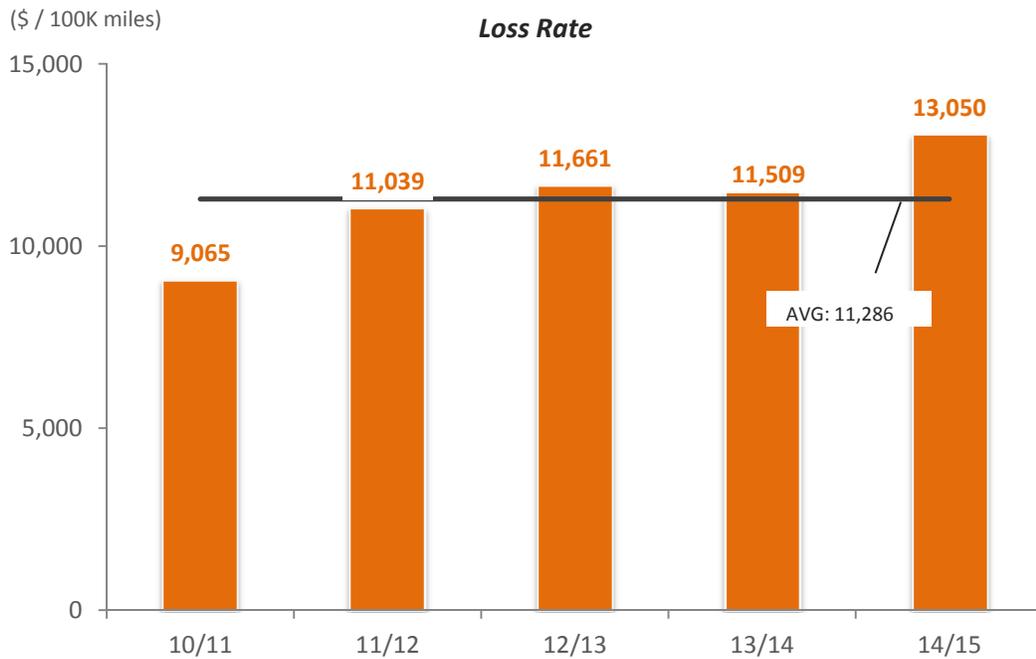
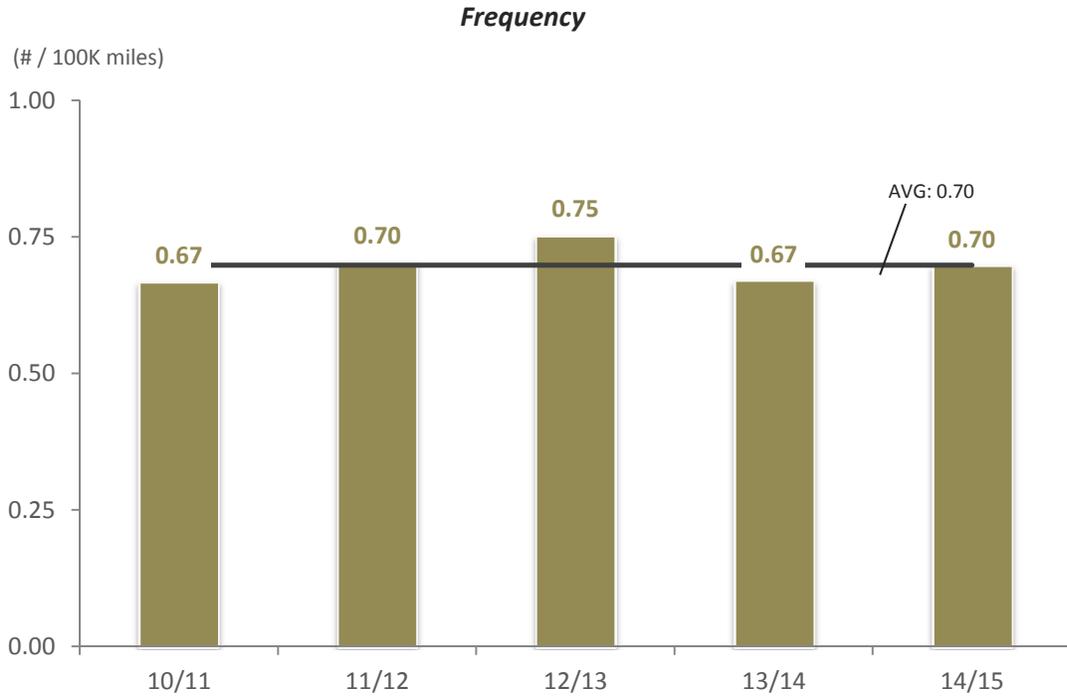
**Average Cost per Occurrence**



# Frequency and Loss Rate

All CalTIP Members Combined

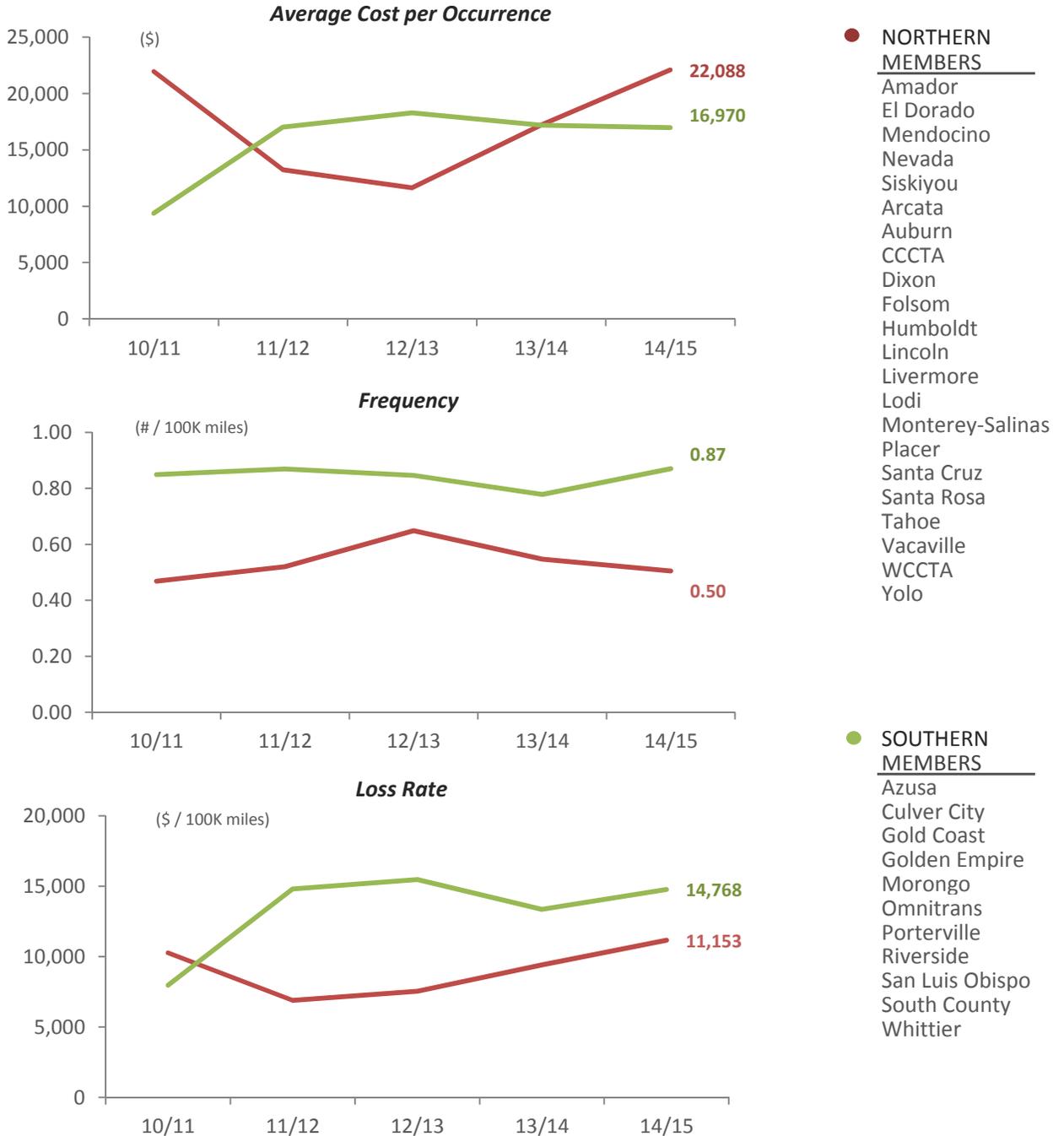
Frequency is the occurrence count divided by the miles traveled, multiplied by 100,000. Loss rate is the incurred losses (paid losses plus reserves) divided by the miles traveled, multiplied by 100,000.



# Average Cost per Occurrence, Frequency, and Loss Rate

All CalTIP Members Combined by Region

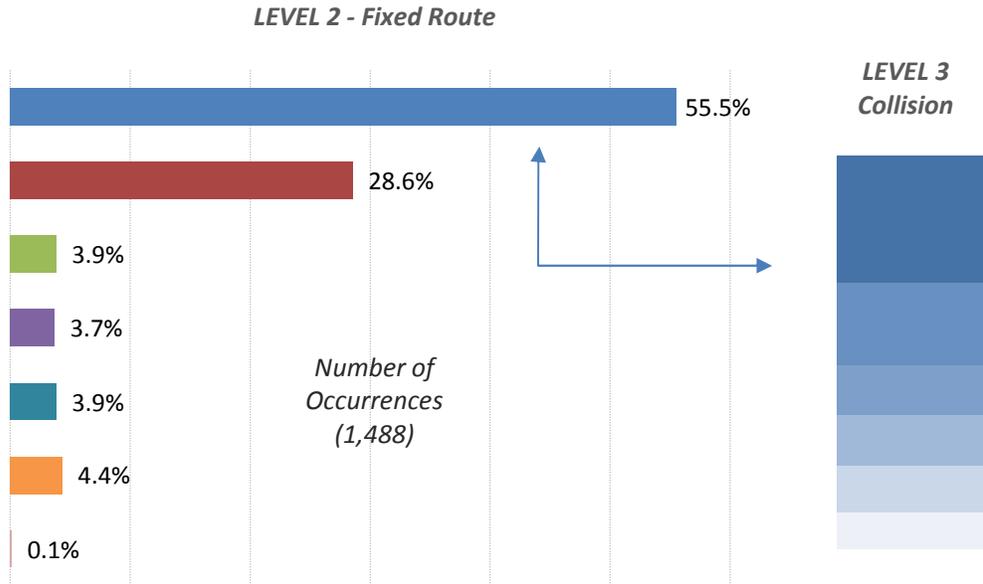
CalTIP members are assigned to Northern or Southern California based on the county in which they primarily operate and the California Institute for Public Risk Analysis's (CIPRA's) division of counties into Northern and Southern California.



# Number of Occurrences by Cause of Loss

## PRDP Loss Codes - Levels 2 & 3 - Collision

This exhibit illustrates in detail the Level 3 cause of loss codes corresponding to occurrences coded to 'Public Transit' and 'Fixed Route' in Levels 1 and 2, respectively. The 1,488 occurrences represent 81% of CalTIP's total occurrences managed by York Risk Services Group, Inc. for the program years 10/11 through 14/15.



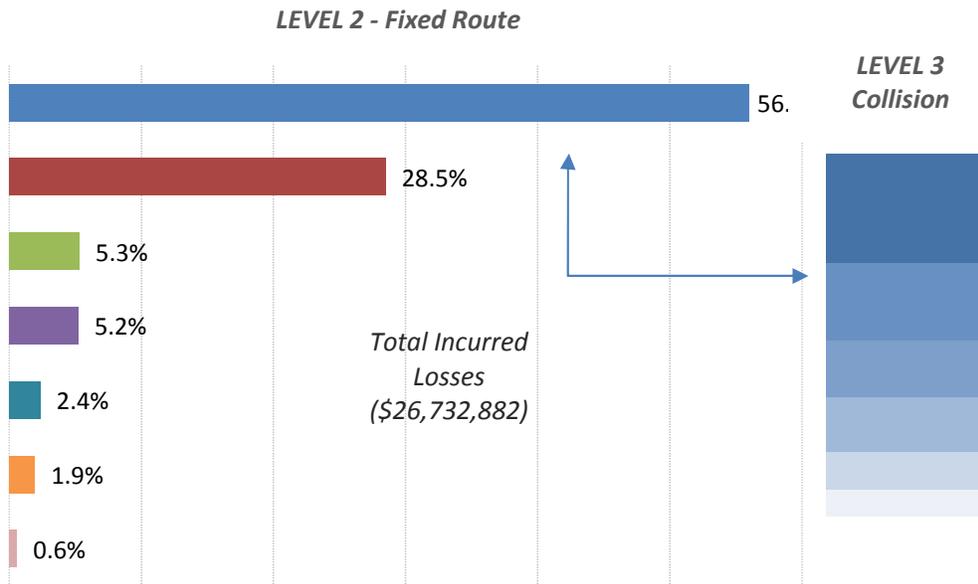
| # Occurrences by LEVEL 2 Fixed Route |              |            | # Occurrences by LEVEL 3 Collision         |            |     |
|--------------------------------------|--------------|------------|--|------------|-----|
|                                      | #            | %          |  | #          | %   |
| ● <b>Collision</b>                   | <b>791</b>   | <b>53%</b> | ■ Collision: side impact: transit veh. pas | 255        | 32% |
| ● Passenger thrown:                  | 407          | 27%        | ■ Collision: solo or with other object     | 164        | 21% |
| ● Pedestrian hazards                 | 55           | 4%         | ■ Collision: transit veh. rearends other v | 101        | 13% |
| ● Access to disabled                 | 53           | 4%         | ■ Collision: side impact: other veh. passi | 100        | 13% |
| ● Other passengers                   | 55           | 4%         | ■ Collision: vehicles at angle             | 95         | 12% |
| ● Drainage                           | 62           | 4%         | ■ Collision: other veh. rearends transit v | 72         | 9%  |
| ● Passenger hit: while on-board      | 2            | 0%         | ■ Collision: on-coming traffic             | 4          | 1%  |
| Equipment                            | 42           | 3%         |  |            |     |
| Crime                                | 10           | 1%         |  |            |     |
| Defamation                           | 8            | 1%         |  |            |     |
| (blank)                              | 2            | 0%         |  |            |     |
| Lighting                             | 1            | 0%         |  |            |     |
|                                      | <b>1,488</b> |            |  | <b>791</b> |     |

NOTE - Truncated code descriptions shown above are as they appear in claims database. "Blank" codes associated with Program II member claims managed by York Risk Services Group, Inc. under contract separate from CalTIP.

# Incurring Losses by Cause of Loss

## PRDP Loss Codes - Levels 2 & 3 - Collision

This exhibit illustrates in detail the Level 3 cause of loss codes corresponding to occurrences coded to 'Public Transit' and 'Fixed Route' in Levels 1 and 2, respectively. The \$26.7 million incurred represents 84% of CalTIP's total incurred on occurrences managed by York Risk Services Group, Inc. for the program years 10/11 through 14/15.



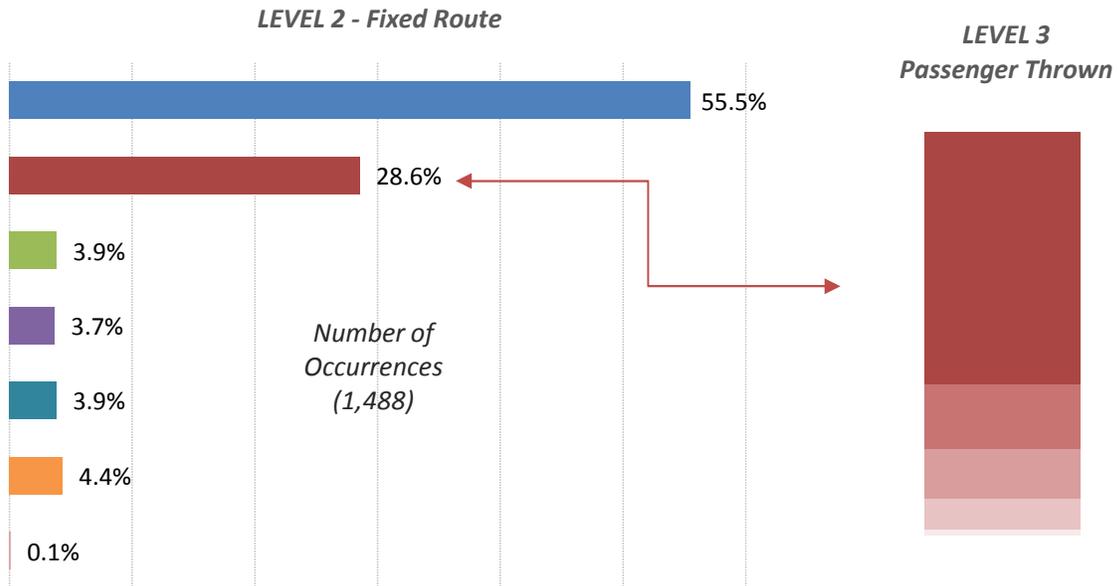
| Incurred Losses by LEVEL 2 Fixed Route |                   |     | Incurred Losses by LEVEL 3 Collision       |                   |     |
|--|-------------------|-----|--|-------------------|-----|
|  | \$                | %   |  | \$                | %   |
| ● Collision                            | 14,932,524        | 56% | ■ Collision: solo or with other object     | 4,212,126         | 28% |
| ● Passenger thrown:                    | 7,589,110         | 28% | ■ Collision: vehicles at angle             | 2,980,227         | 20% |
| ● Access to disabled                   | 1,421,400         | 5%  | ■ Collision: transit veh. rearends other v | 2,236,748         | 15% |
| ● Pedestrian hazards                   | 1,392,323         | 5%  | ■ Collision: side impact: transit veh. pas | 2,117,878         | 14% |
| ● Drainage                             | 629,037           | 2%  | ■ Collision: other veh. rearends transit v | 1,478,318         | 10% |
| ● Other passengers                     | 517,740           | 2%  | ■ Collision: on-coming traffic             | 1,034,950         | 7%  |
| ● Equipment                            | 160,019           | 1%  | ■ Collision: side impact: other veh. passi | 872,277           | 6%  |
| ● Crime                                | 42,085            | 0%  |  |                   |     |
| ● Defamation                           | 34,962            | 0%  |  |                   |     |
| ● Passenger hit: while c               | 8,429             | 0%  |  |                   |     |
| ● (blank)                              | 3,934             | 0%  |  |                   |     |
| ● Lighting                             | 959               | 0%  |  |                   |     |
|  | <b>26,732,522</b> |     |  | <b>14,932,524</b> |     |

NOTE - Truncated code descriptions shown above are as they appear in claims database. "Blank" codes associated with Program II member claims managed by York Risk Services Group, Inc. under contract separate from CalTIP.

# Number of Occurrences by Cause of Loss

## PRDP Loss Codes - Levels 2 & 3 - Passenger Thrown

This exhibit illustrates in detail the Level 3 cause of loss codes corresponding to occurrences coded to 'Public Transit' and 'Fixed Route' in Levels 1 and 2, respectively. The 1,488 claims represent 81% of CalTIP's total occurrences managed by York Risk Services Group, Inc. for the program years 10/11 through 14/15.



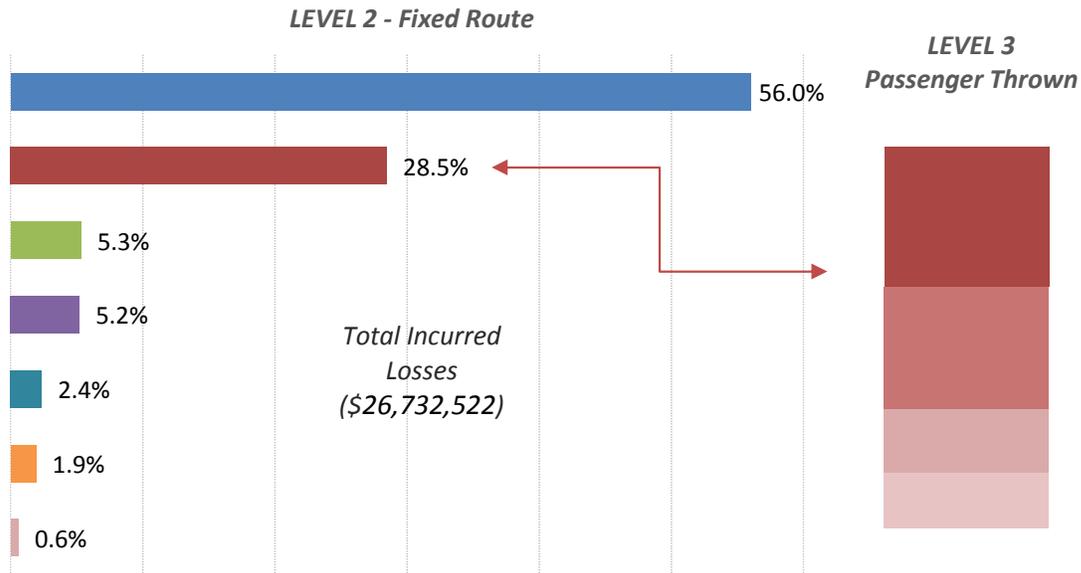
| # Occurrences by LEVEL 2 Fixed Route |              |            | # Occurrences by LEVEL 3 Passenger Thrown  |            |     |
|--------------------------------------|--------------|------------|--|------------|-----|
|                                      | #            | %          |  | #          | %   |
| ● Collision                          | 791          | 53%        | ■ Passenger thrown: while transit veh. mov | 255        | 63% |
| ● <b>Passenger thrown:</b>           | <b>407</b>   | <b>27%</b> | ■ Passenger thrown: while transit veh. sto | 65         | 16% |
| ● Pedestrian hazards                 | 55           | 4%         | ■ Passenger thrown: while alighting from t | 51         | 13% |
| ● Access to disabled                 | 53           | 4%         | ■ Passenger thrown: while boarding transit | 31         | 8%  |
| ● Other passengers                   | 55           | 4%         | ■ Passenger thrown: while transit veh. sta | 5          | 1%  |
| ● Drainage                           | 62           | 4%         |  |            |     |
| ● Passenger hit: while on-board      | 2            | 0%         |  |            |     |
| ● Equipment                          | 42           | 3%         |  |            |     |
| ● Crime                              | 10           | 1%         |  |            |     |
| ● Defamation                         | 8            | 1%         |  |            |     |
| ● (blank)                            | 2            | 0%         |  |            |     |
| ● Lighting                           | 1            | 0%         |  |            |     |
|                                      | <b>1,488</b> |            |  | <b>407</b> |     |

NOTE - Truncated code descriptions shown above are as they appear in claims database. "Blank" codes associated with Program II member claims managed by York Risk Services Group, Inc. under contract separate from CalTIP.

# Incurring Losses by Cause of Loss

## PRDP Loss Codes - Levels 2 & 3 - Passenger Thrown

This exhibit illustrates in detail the Level 3 cause of loss codes corresponding to occurrences coded to 'Public Transit' and 'Fixed Route' in Levels 1 and 2, respectively. The \$26.7 million incurred represents 84% of CalTIP's total incurred losses for occurrences managed by York Risk Services Group, Inc. for the program years 10/11 through 14/15.



*Incurring Losses by*

**LEVEL 2**  
**Fixed Route**

|                                   | \$                | %          |
|-----------------------------------|-------------------|------------|
| ● Collision                       | 14,932,524        | 56%        |
| ● <b>Passenger thrown:</b>        | <b>7,589,110</b>  | <b>28%</b> |
| ● Access to disabled              | 1,421,400         | 5%         |
| ● Pedestrian hazards              | 1,392,323         | 5%         |
| ● Drainage                        | 629,037           | 2%         |
| ● Other passengers                | 517,740           | 2%         |
| ● Equipment                       | 160,019           | 1%         |
| ● Crime                           | 42,085            | 0%         |
| ● Defamation                      | 34,962            | 0%         |
| ● Passenger hit: while or (blank) | 8,429             | 0%         |
| ● Lighting                        | 959               | 0%         |
| <b>Total</b>                      | <b>26,732,522</b> |            |

*Incurring Losses by*

**LEVEL 3**  
**Passenger Thrown**

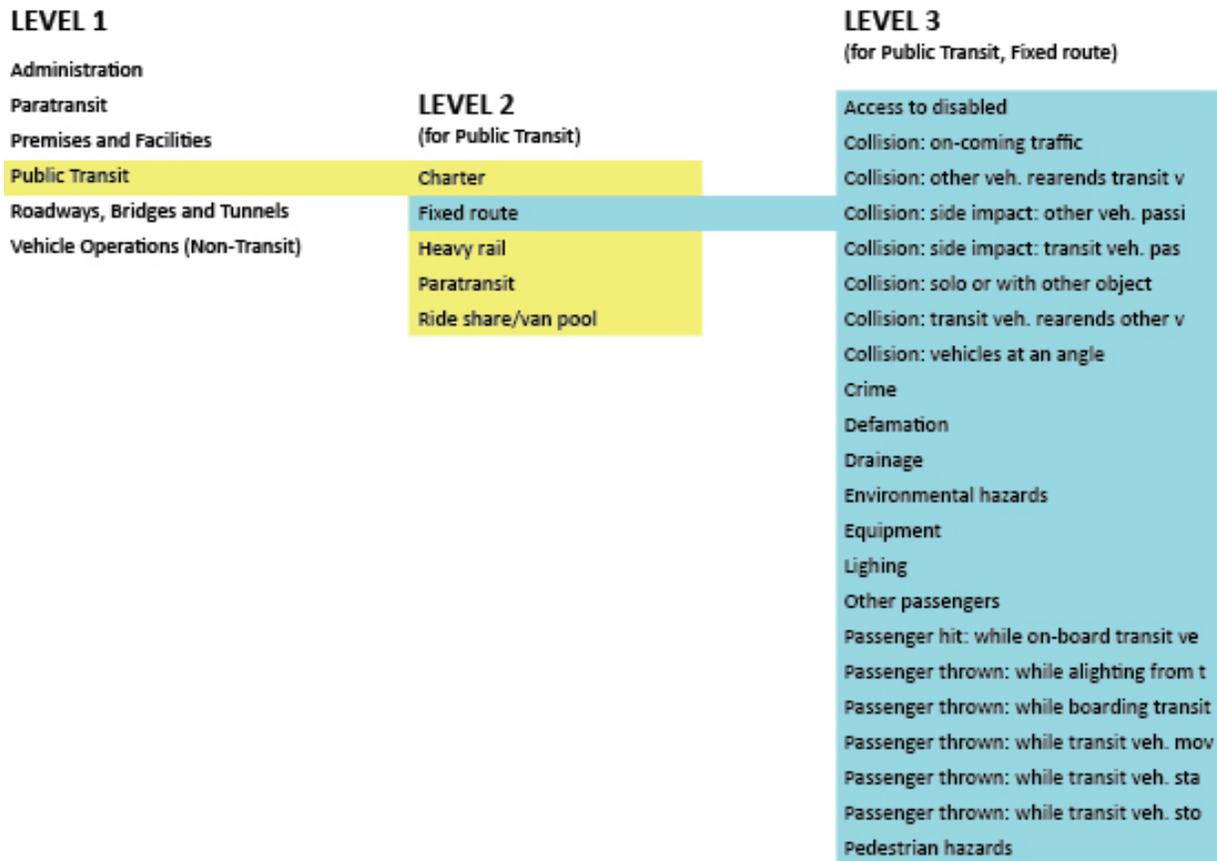
|  | \$               | %   |
|--|------------------|-----|
| ■ Passenger thrown: while transit veh. mov | 2,779,594        | 37% |
| ■ Passenger thrown: while alighting from t | 2,422,972        | 32% |
| ■ Passenger thrown: while transit veh. sto | 1,276,000        | 17% |
| ■ Passenger thrown: while boarding transit | 1,104,347        | 15% |
| ■ Passenger thrown: while transit veh. sta | 6,196            | 0%  |
| <b>Total</b>                               | <b>7,589,110</b> |     |

NOTE - Truncated code descriptions shown above are as they appear in claims database. "Blank" codes associated with Program II member claims managed by York Risk Services Group, Inc. under contract separate from CalTIP.

# Appendix – A

## PRDP Loss Codes

York Risk Services Group, Inc. (York) uses a four-level, hierarchical loss coding system authored by the Public Risk Database Project (PRDP). The four-levels of codes are organized in a drill-down hierarchy. About 80% of CalTIP’s claims managed by York are coded to ‘Public Transit’ in Level 1 and ‘Fixed Route’ in Level 2. For this reason, the exhibits examining PRDP loss codes focus only on these two levels: ‘Public Transit’ and ‘Fixed Route’ (see illustration below).



# Appendix – B

## Definitions

**Average Cost per Occurrence** is determined by dividing the value of total incurred losses (paid losses plus reserves) by the number of occurrences. The result is a dollar amount reflecting the average cost per occurrence.

**Experience Modification Factors (Xmods)** are designed to adjust an individual member's CalTIP contributions up or down based on whether its historical loss experience has been better or worse than the CalTIP average. Xmods below 1.00 indicate better than average experience. Xmods above 1.00 indicate worse than average experience.

**Frequency** is the number of occurrences experienced per mile traveled. It is determined by taking the occurrence count divided by the miles traveled, multiplied by 100,000. The result is the number of occurrences incurred per 100,000 traveled.

**Incurred Losses** are the paid losses plus case reserves on each occurrence.

**Loss Rate** is the cost incurred per mile traveled. It is determined by taking the incurred losses (paid losses plus reserves) divided by the miles traveled, multiplied by 100,000. The result is a dollar amount of incurred losses per 100,000 miles traveled.

**Mileage** is the sum of revenue vehicle and non-revenue vehicle miles as reported on the annual mileage certification survey. Revenue vehicle mileage is miles operated or driven by revenue vehicles (i.e., buses or passenger vans). Non-revenue vehicle mileage is miles operated or driven by non-revenue vehicles, meaning any car or service truck.

**Public Risk Database Project (PRDP)** is a data warehouse containing public entity risk management information. When it was first developed, data suppliers provided loss data according to PRDP specifications, which included a four-level hierarchical loss coding system. These codes are now used by York for all Program I and some Program II members. If a Program II member contracts directly with York or a claim exceeding its self-insured retention has been reported to York, these claims are included in the PRDP exhibits.

**AGENDA**

**ITEM 6**



STAFF REPORT

SUBJECT: Paratransit Operating Policy Change

FROM: Christy Wegener, Director of Planning and Communications

DATE: June 27, 2016

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**Action Requested**

Approval

**Background**

Staff is seeking to update the paratransit operating policy and paratransit application to include language about mandatory in-person interviews/assessments as a part of the eligibility process. Additionally, language has been incorporated to address cancelled or no-showed in-person interview appointments.

**Discussion**

The current LAVTA paratransit policy states that in-person interviews/assessments may be included in the eligibility process. Staff is seeking a modification of the policy language to require interviews and assessments for new or recertifying paratransit applicants. Additionally, staff is recommending adding in policy language to reflect clients who cancel or no-show their interviews.

The following language has been added to Section 3.2 of the proposed Paratransit Policy (Attachment 1)

- 3.2.1 The Dial-A-Ride eligibility determination process includes submittal and review of a paper application and an in-person interview/functional assessment. If the applicant needs a ride to/from the assessment it will be provided free of charge to the applicant.
- 3.2.2 If the applicant needs to cancel the in-person assessment appointment he/she should do so as soon as possible, but at least one hour before the scheduled interview time. If the applicant requested a free Dial-A-Ride transportation to/from assessment he/she need to cancel the ride at least one hour before the scheduled pick-up window.

If the applicant cancels or no-shows the in-person assessment the assessor will attempt to call at least once to reschedule. If the applicant or a caretaker do not return the call within a seven day period after the no-show/cancellation the

assessor will send a letter stating that the application is incomplete and he/she should re-schedule the interview. In cases where the applicant was previously granted a presumptive temporary eligibility cancels or no-shows the in-person assessment and does not reschedule within a seven day period, he/she will lose his/her privilege to ride on ADA paratransit until the assessment has been completed.

Staff is also recommending making changes to Section 3.2.4, addressing the timeframe to process applications:

- 3.2.4 The eligibility determination will be made within 21 days of receipt of a complete application and the completion of an in-person assessment interview.

The paratransit application (Attachment 2) has been updated to reflect the following language:

Page 2: The application must be properly and fully completed. As a part of the application process, Wheels requires an in-person interview. The in-person interview may include a functional test to determine your ability to take a public transit trip, such as being capable of walking to a bus stop, reading signs etc. Your application will be processed within 21 days after the complete application (including the doctor's verification on pages 11-13) has been received and the in-person interview conducted.

### **Recommendation**

Endorse and forward to the Board of Directors for approval.

Attachments:

- 1) Proposed Paratransit Policy June 2016
- 2) Proposed Paratransit Application

# LIVERMORE AMADOR VALLEY TRPANSIT AUTHORITY

## WHEELS DIAL-A-RIDE OPERATING POLICY

**Policy Adoption Date – 7-6-2015**

This Wheels Dial-a-Ride Operating Policy (“Policy”) consolidates and clarifies LAVTA policies and regulations related to the Wheels Dial-A-Ride service. This Policy has been developed to meet or exceed all applicable state and federal laws and regulations.

### **1. SERVICE CHARACTERISTICS**

#### **1.1 ADA Paratransit**

Public transportation systems that provide fixed route transit service are required by law to provide a complementary paratransit service. Pursuant to this mandate, LAVTA provides the Wheels Dial-A-Ride paratransit service.

#### **1.2 Demand Response**

Dial-A-Ride is a demand-responsive transportation service.

#### **1.3 Shared Ride**

Dial-A-Ride is a public shared ride transportation service.

#### **1.4 On-Board Travel Times**

A trip on a Dial-A-Ride paratransit vehicle takes approximately the same amount of time as a similar trip on a Wheels fixed route bus, including travel time to and from a bus stop, and any transfer time.

#### **1.5 Trip Priorities**

Dial-A-Ride does not assign priorities by trip purpose.

#### **1.6 Door-to-Door Service**

Dial-A-Ride is a door-to-door, origin-to-destination service subject to the limits described in Section 2 of this Policy.

#### **1.7 Passenger Assistance**

Subject to the limits described in Section 2 of this Policy, drivers will provide assistance in boarding and deboarding the vehicle, upon request. Assistance may include helping a passenger to or from the door of their origin or destination (no further than public lobbies), guiding a passenger to or from the vehicle, lending a steady arm for balance, finding a seat, or securing a mobility aid.

Drivers will not provide assistance that involves lifting or carrying a passenger. Passengers in need of extensive assistance should arrange to travel with a Personal Care Attendant (PCA).

Driver assistance with grocery and shopping bags of reasonable weight or luggage is limited to two (2) trips (four bags total) from origin to vehicle, and from vehicle to destination. Driver may set bags outside a front door, but will not enter a private residence.

## **1.8 Service Area**

Dial-A-Ride service area is complementary to the LAVTA fixed route service area and generally consists of the cities of Livermore, Dublin, and Pleasanton. See *Attachment A* for the Dial-A-Ride service area map

### **1.8.1. Livermore Veterans Affairs Medical Center Service Area Extension**

The Livermore Veterans Affairs Medical Center is located in unincorporated Alameda County, south of the City of Livermore. Direct service between the Dial-A-Ride service area and this medical facility is provided as an extension of the regular service area.

### **1.8.2. Southern portion of San Ramon Service Area Extension**

LAVTA and the Central Contra Costa Transit Authority have a reciprocal agreement that allows each operator to provide direct service from one system to the other, allowing a passenger to avoid the transfer at the Dublin/Pleasanton BART station if the transfer would have an undue negative effect on the passenger.

As a general rule, given the very close proximity and boundaries of the two service areas, the reciprocal agreement provides for direct service between the Dial-A-Ride service area and the southern portion of San Ramon, bordered by the I-680 to the West, Norris Canyon Road to the North, Alcosta Boulevard to the East, and the City of Dublin city limits to the South.

## **1.9 Service Hours**

Dial-A-Ride service operates during the same days and hours as Wheels fixed-route service.

## **2. DRIVER AND RIDER CODE OF CONDUCT**

### **2.1 Drivers are not Permitted to:**

- a. Escort a passenger beyond the ground floor lobby of a public building, beyond the lobby of a multi-unit residential building, or beyond the front door of a private residence.
- b. Perform any personal care assistance for any passenger. Examples include assisting with dressing, grooming, or administering medicine.
- c. Accept tips or gratuities.
- d. Wait for a passenger to make a stop to conduct business, such as at an ATM/Cash machine or pharmacy.
- e. Smoke, eat, or drink (except for water) in the vehicle while servicing a trip.

- f. Use a cell phone for personal calls, play loud music, or wear headphones.
- g. Neglect acceptable standards of personal hygiene.
- h. Dress in an unprofessional manner.
- i. Forget to wear their badge.
- j. Be rude or harassing to the passengers.
- k. Commit violent or illegal acts.

## **2.2 Riders are not Permitted to:**

- a. Eat or drink (except for water) on vehicles, unless doing so is medically necessary.
- b. Play radios or music at a volume loud enough to be heard by the driver or other passengers.
- c. Litter on the vehicles.
- d. Neglect acceptable standards of personal hygiene.
- e. Distract the driver or interfere with the operations of the vehicle or equipment.
- f. Block the aisle with their mobility aids.
- g. Carry fireworks, flammable liquids, or weapons aboard the vehicle.
- h. Use abusive, threatening, or obscene language to other riders or any LAVTA/Dial-A-Ride staff.
- i. Commit seriously disruptive (including violent) or illegal acts.

## **3. ELIGIBILITY**

### **3.1 Eligibility Definitions**

- 3.1.1.** Individuals who, because of physical or developmental impairment, cannot utilize fixed route transit, no matter how accessible, are eligible for Dial-A-Ride service. This eligibility requirement is generally synonymous with inability to “navigate the system.”
- 3.1.2.** Those individuals who can use fixed route transit, but who, because of physical or developmental impairment, cannot access their desired route, or cannot access their final destination after leaving a fixed-route vehicle, are also eligible for Dial-A-Ride service.

### **3.2 Eligibility Determination**

- 3.2.1.** The Dial-A-Ride eligibility determination process includes submittal and review of a paper application and an in-person interview/functional assessment. If the applicant needs a ride to/from the assessment it will be provided free of charge to the applicant.
- 3.2.2.** If the applicant needs to cancel the in-person assessment appointment he/she should do so as soon as possible, but at least one hour before the scheduled interview time. If the applicant requested a free Dial-A-Ride transportation

to/from assessment he/she need to cancel the ride at least one hour before the scheduled pick-up window.

If the applicant cancels or no-shows the in-person assessment the assessor will attempt to call at least once to reschedule. If the applicant or a caretaker do not return the call within a seven day period after the no-show/cancellation the assessor will send a letter stating that the application is incomplete and he/she should re-schedule the interview. In cases where the applicant was previously granted a presumptive temporary eligibility cancels or no-shows the in-person assessment and does not reschedule within a seven day period, he/she will lose his/her privilege to ride on ADA paratransit until the assessment has been completed.

**3.2.3.** LAVTA will process ADA Paratransit applications for the residents of Livermore, Dublin, Pleasanton, and Sunol.

**3.2.4.** The eligibility determination will be made within 21 days of receipt of a complete application and the completion of an in-person assessment interview.

### **3.3 Children's Eligibility**

**3.3.1.** To be determined eligible for Dial-A-Ride service, a child with a disability who is not able to use fixed-route bus service independently must show that his or her disability -- rather than age -- causes the child's inability to use fixed-route bus service independently

**3.3.2.** For children younger than five (5) years of age, LAVTA evaluates the functional ability of the *child with an adult*, as opposed to the child alone. LAVTA certifies a child with an adult as paratransit-eligible if the child's disability prevents him or her from using fixed-route bus service when accompanied by an adult.

**3.3.3.** In the event a child younger than five years of age with a disability is able to use fixed-route bus service when accompanied by an adult, the child would generally not be eligible for paratransit.

### **3.4 Visitor Eligibility**

**3.4.1.** The right to paratransit services as mandated by ADA cannot be restricted based on where the individual lives. An individual seeking to use Dial-A-Ride services does not have to reside in LAVTA service area and does not have to be ADA paratransit certified by LAVTA. LAVTA will honor individuals' ADA paratransit certification by other United States public transit agencies.

**3.4.2.** If the individual is not able to produce documentation of ADA certification by another transit system, but claims to be eligible for service, service will

be provided. However, LAVTA may request proof that the individual is not a resident, and in some cases (for hidden impairment conditions), medical documentation may be required.

- 3.4.3.** Under no circumstances is a visitor to the system entitled to service beyond twenty-one (21) days, in any combination, during any 365-day period, beginning with the visitor's first use of the service. Visitors intending to use Dial-A-Ride services for more than this limit should apply for Dial-a-Ride eligibility through LAVTA directly.

### **3.5 Eligibility Denials and Appeals**

If an applicant does not agree with the eligibility decision made by LAVTA in response to his/her application and interview, he/she must request an appeals hearing in writing within sixty (60) days of the date of the eligibility determination notification letter. The applicant may bring an advocate or personal representative to the appeals hearing. Complimentary Dial-A-Ride service will be provided both to and from the appeals hearing.

- 3.5.1.** The request for an appeal must be forwarded to LAVTA's Executive Director. A response by the Executive Director will be completed within thirty (30) days of the receipt of communication of the request. The response will be provided in a written or accessible format. If the decision is not made by the 31st day, appellant may request use of paratransit services until a decision is made.

## **4. MOBILITY AIDS**

Passengers using mobility aids will be accommodated whenever safely possible. A passenger who uses a mobility aid may be required to attend an in-person assessment at the LAVTA offices (at no cost to the passenger).

### **4.1 Mobility Aids Characteristics**

#### **4.1.1. Weight**

A mobility aid, when occupied by a user that exceeds the specified maximum weight capacity of the lift/ramp on a Dial-A-Ride vehicle may not be accommodated. Occupied mobility aids exceeding the weight capacity of the ramp/lift will be evaluated on a case-by-case basis.

#### **4.1.2. Dimensions**

Mobility aids will be accommodated on paratransit vehicles as long as the mobility aid and user do not exceed the size of the mobility aid securement area on the vehicle. As a safety requirement, mobility aids cannot block the aisle and cannot present a physical threat to other passengers.

### **4.2 Mobility Aid Securements and Passenger Restraints**

Wheelchairs and other mobility aids must be secured to the Dial-A-Ride vehicles, ideally via a four-point tie-down system, and passengers must use the appropriate personal restraints. Passengers refusing the securements and/or restraints will be asked to deboard the vehicle.

#### **4.3 Segway Use**

Segways (or similar personal assistive mobility devices) are only permitted on-board when used as a mobility aid. Segways used for leisure will not be allowed on Dial-A-Ride vehicles. Segways must be secured on Dial-A-Ride vehicles.

### **5. RESERVATIONS**

#### **5.1 Scheduling Reservations**

Reservations can be made one (1) to seven (7) days in advance. Reservations can be made by phone by calling (925) 455-7510 from 8:30 a.m. to 5:00 p.m. any day of the week, or by using the Book-A-Trip feature on LAVTA's website.

#### **5.2 Standing Orders/Subscription Rides**

For their repeated trips, passengers may set up a Standing Order/Subscription Ride. A Standing Order is an ongoing reservation for a trip ("subscription trip") that has the same starting and ending location and the same pick-up day and time.

Standing Order requests cannot always be fulfilled. To allow for equal access to service for all passengers, federal paratransit regulations provide that subscription trips may not absorb more than 50% of total system capacity at any time.

##### **5.2.1. Standing Orders During Holidays**

Except for trips to and from dialysis, Standing Orders will not be served on the following holidays: New Year's Day, Martin Luther King Jr. Day, Presidents' Day, Memorial Day, Independence Day, Labor Day, Veterans Day, Thanksgiving Day, the Day after Thanksgiving, Christmas Eve, and Christmas Day. Individual reservations on these holidays can still be made per the regular scheduling process.

#### **5.3 Reservation Request**

Passengers have the option of requesting a reservation based on EITHER the desired pick-up time OR the desired drop-off time.

#### **5.4 Negotiating Pick-Up Time**

If the desired pick-up time cannot be accommodated, the reservationist may offer alternative pick-up times ranging from one (1) hour before to one (1) hour after the requested pick-up time.

#### **5.5 Changing a Reservation**

To make changes to existing reservations, passengers must notify Dial-A-Ride at least one (1) day before the scheduled trip.

## **5.6 Canceling a Trip**

Passengers must cancel the trips they do not plan to take as soon as possible and at least one (1) hour before the scheduled pick-up window to avoid penalties.

## **6. SERVICE DELIVERY**

### **6.1 Fares**

Fares must be paid at the beginning of the ride. Passengers may pay with pre-purchased Dial-A-Ride tickets or cash (exact change).

### **6.2 Pick-Up Window**

The pick-up window is defined as the thirty (30) minute time period starting from the scheduled pick-up time. The pick-up is considered to be on time if the vehicle arrives anytime within the 30 minute pick-up window. For example, if the pick-up is scheduled for 2:30 p.m., the vehicle may arrive anytime between 2:30 p.m. and 3:00 p.m. and be considered on time.

### **6.3 Five (5) Minute Rule**

After the vehicle arrives within the thirty (30) minute pick-up window, the passenger must be ready within five (5) minutes of notice of the vehicle's arrival. If the passenger does not meet the vehicle when it arrives, the driver will attempt to find the passenger and dispatch will attempt to telephone the passenger. If the passenger cannot be located or chooses not to start boarding within five (5) minutes, the driver may leave.

### **6.4 Early Pick-Ups**

If the vehicle arrives before the thirty (30) minute pick-up window, the passenger may choose to take the trip early or have the driver wait until the start of the confirmed pick-up window.

### **6.5 Late Pick-Ups**

If the vehicle is expected to be more than thirty-five (35) minutes late, the dispatcher should call the passenger as a courtesy. If the ride arrives after the 30-minute pick-up window, the passenger may decline to take the trip without penalty.

### **6.6 Same Day Trip Changes**

If an appointment (e.g., medical or dental) takes longer than expected, the passenger or office personnel should call (925) 455-7510 as soon as possible to give a new pick-up time. Due to the nature of Dial-A-Ride's prescheduled operation, the new desired pick-up time cannot be guaranteed in this situation.

### **6.7 Passenger No-Show and Late Cancellation**

#### **6.7.1. Definitions**

**6.7.1.1** “No Show”

A trip for which a passenger is not present at the prearranged time and prearranged location, and has not notified Dial-A-Ride about a schedule change, constitutes a “No Show.” If a schedule change or cancellation is required, passengers are expected to inform Dial-A-Ride no less than one (1) hour prior to the beginning of the prearranged pick-up window.

**6.7.2.1** “Late Cancellation”

If a passenger informs Dial-A-Ride of a schedule change or cancellation less than one (1) hour prior to the beginning of a prearranged pick-up window, the patron will receive a “Late Cancellation.”

**6.7.2. Infractions**

Both “No-Shows” and “Late Cancellations” are considered equal infractions.

**6.7.3 Excused No-Shows and Late Cancellations**

The following are circumstances in which the No-Show or Late Cancellation is excused:

- a. Late arrival by a Dial-A-Ride vehicle (outside the prearranged window);
- b. The Dial-A-Ride vehicle is dispatched to a wrong address or entrance of a building;
- c. A verified worsening of a passenger with a variable condition (medical or otherwise) which prevented the patron from calling at least one (1) hour in advance;
- d. A verified family emergency which prevented the passenger from calling at least one (1) hour in advance;
- e. Other verified circumstances that make it impracticable for the passenger to travel at the scheduled time and also for the passenger to notify dispatch before one (1) hour of the beginning of the pick-up window to cancel the trip.

**6.8 Do Not Leave Alone Policy**

LAVTA strongly recommends that passengers who cannot wait alone to be met at, or let into, their destinations be accompanied by a Personal Care Attendant (PCA). PCAs travel for free with a paying ADA paratransit passengers. The Do Not Leave Alone Policy is provided for those times when a PCA is not available and the passenger is not able to wait alone.

**6.8.1. When The Driver Will Wait**

For passengers travelling alone who cannot wait alone at their destinations, the driver will wait with the passenger until the connecting transit agency arrives or a person at the destination receives the passenger if both of the following conditions have been met.

- 6.8.1.1** The passenger has a Do Not Leave Alone note in his/her Dial-A-Ride file.

- 6.8.1.2** As part of the trip reservation, LAVTA was informed of the need for an attended transfer or drop-off.

**6.8.2. Receiver Not Present Infraction**

If the person responsible to receive the Do Not Leave Alone rider is not present within five (5) minutes of the arrival of the vehicle, the trip will be recorded as a Receiver Not Present infraction. Passengers will be notified when a trip is recorded as a Receiver Not Present infraction. Passengers will be given an opportunity to discuss their trip records with, and present information on the circumstances concerning the trip to LAVTA staff.

**6.8.3. Excused Receiver Not Present Infraction**

The passenger will not receive an infraction if the receiver is a connecting paratransit operator.

**7. ACCOMPANIED PASSENGERS**

**7.1 Personal Care Attendants (PCAs) and Companions**

Dial-A-Ride passengers may be accompanied by a PCA at no charge to the passenger or PCA. Dial-A-Ride passengers may also be accompanied by one or more companions. Companions must pay full Dial-A-Ride fares.

Reservations for PCAs and/or companions must be made when scheduling the Dial-A-Ride-eligible passenger's trip. Additional companions beyond the first companion are accommodated on a space-available basis. Companions and PCAs must ride to and from the same locations and at the same times as the Dial-A-Ride-eligible passenger.

**7.2 Children**

All children who are under eight (8) years old, unless they are at least 4-foot, 9-inches tall, must travel in a child safety seat in order to comply with California State Law. Parents or guardians must provide their own child safety seat and take it with them when they exit the vehicle. Dial-A-Ride does not provide or install child safety seats.

**7.3 Service Animals**

The passenger may bring a service animal that has been individually trained to work or perform tasks for the passenger with a disability. The service animal must be under its owner's control at all times and may not display aggressive or other seriously disruptive behavior, or behavior that poses a direct threat to the health or safety of others. Passengers must specify during the reservation process if they will be accompanied by a service animal.

**8. NEIGHBORING PARATRANSIT OPERATORS**

**8.1 Pleasanton Paratransit Service**

According to an agreement with the City of Pleasanton, the Pleasanton Paratransit Service also provides demand-responsive service within the LAVTA service area, but only within the City of Pleasanton. The Pleasanton Paratransit service is operated by the City of Pleasanton and is a separate entity from Dial-A-Ride.

## **8.2 County Connection LINK and East Bay Paratransit**

LAVTA's ADA paratransit passengers may use ADA paratransit services anywhere in the nine (9) San Francisco Bay Area counties where such services are available. Passengers may schedule trips that take them into the service area of other Bay Area ADA paratransit providers. Dial-A-Ride has agreements with neighboring paratransit operators to facilitate transfers between service areas.

- 8.2.1.** LAVTA coordinates transfer trips with East Bay Paratransit and County Connection LINK.
- 8.2.2.** The designated transfer point between Dial-A-Ride and the neighboring East Bay Paratransit and County Connection LINK operators is at the East Dublin/Pleasanton BART Station.
- 8.2.3.** The drivers for East Bay Paratransit and County Connection LINK do not have policies under which they will wait with a passenger after de-boarding.
- 8.2.4.** When Dial-A-Ride receives a passenger from East Bay Paratransit or County Connection LINK at the Dublin/Pleasanton BART station, fare is NOT collected for the second part of the trip.

## **9. REASONABLE MODIFICATIONS**

- 9.1** LAVTA considers all requests for reasonable modifications of its policies, practices, or procedures, including those set forth herein, when necessary to avoid discrimination on the basis of disability. LAVTA is not required to grant requests for reasonable modifications that would fundamentally alter the nature of Dial-A-Ride services, programs or activities; are not needed for access to LAVTA services, programs or activities; or present a direct threat of injury to other persons or property.
- 9.2** Any person seeking a reasonable modification of LAVTA or Dial-A-Ride policies, practices or procedures, desiring to appeal a reasonable modification determination, or who believes they have been discriminated against by LAVTA on the basis of a disability may submit a modification request, appeal, or complaint for handling in accordance with related LAVTA policies.
- 9.3** The designated responsible employee for the reasonable modification requests is LAVTA's Paratransit Planner.

## **10. SANCTIONS**

### **10.1 Progressive basis**

LAVTA will sanction Dial-A-Ride passengers progressively based on the cumulative infractions described above, and as further set forth below, over a rolling twenty-four (24) month period.

## 10.2 Sanctionable Offenses

### 10.2.1. Excessive Late Cancellations and No-Show Infractions

Passengers are subject to sanctions if they have 20% or more No-Shows and/or Late Cancellations (calculated by dividing validated No-Shows and Late Cancellations by actual “taken trips”) within any given month (from the 1<sup>st</sup> to the last day), AND at least three (3) No-Shows and Late Cancellations during that month.

### 10.2.2. Excessive Receiver Not Present Infractions

Passengers are subject to sanctions if they have received Receiver Not Present infractions two (2) or more times within any given month (from the 1<sup>st</sup> to the last day) or four (4) or more times within a six (6) month period.

## 10.3 Progressive Sanction Penalties

10.3.1. 1<sup>st</sup> Sanction – Passenger will receive a phone call from the LAVTA staff. Staff will detail the specific dates and times of No-Shows/Late Cancellations or Receiver Not Present Violations, will discuss the impact to the system caused by ineffective use, and will describe the progressive sanctions if the pattern of these violations continues.

10.3.2. 2<sup>nd</sup> Sanction – Passenger will receive a formal written correspondence from LAVTA detailing the specific dates and times of the No-Shows/Late Cancellations or Receiver Not Present Violations. This correspondence will warn the passenger that another month of excessive violations will result in a 15-day suspension of service.

10.3.3. 3<sup>rd</sup> Sanction – Passenger will receive formal notification from LAVTA of a fifteen (15) day suspension of service. This correspondence will detail the specific dates and times of the No-Shows/Late Cancellations or Receiver Not Present Violations as well as the proposed suspension dates. The proposed suspension dates will be no sooner than twenty (20) days after sending the written correspondence to provide time for an appeal by the passenger. The notification shall warn the patron that another month of excessive violations will result in a 30-day suspension of service.

10.3.4. 4<sup>th</sup> Sanction – Passenger will receive formal notification from LAVTA of a thirty (30) day suspension of service. This correspondence will detail the specific dates and times of the No-Shows/Late Cancellations or Receiver Not Present Violations as well as the proposed suspension dates. The proposed suspension dates will be no sooner than twenty (20) days after

sending the written correspondence to provide time for an appeal by the passenger. This notification will warn the passenger that another month of excessive violations will result in a 60-day suspension of service.

**10.3.5. 5<sup>th</sup> Sanction** – Passenger will receive formal notification from LAVTA of a sixty (60) day suspension of service. This correspondence will detail the specific dates and times of the No-Shows/Late Cancellations or Receiver Not Present Violations as well as the proposed suspension dates. The proposed suspension dates will be no sooner than twenty (20) days after sending the written correspondence to provide time for an appeal by the passenger. This notification will warn the passenger that another month of excessive violations will result in a 90-day suspension of service.

**10.3.6. 6<sup>th</sup> Sanction** - Passenger will receive formal notification from LAVTA of a ninety (90) day suspension of service. This correspondence will detail the specific dates and times of the No-Shows/Late Cancellations or Receiver Not Present Violations as well as the proposed suspension dates. The proposed suspension dates will be no sooner than twenty (20) days after sending the written correspondence to provide time for an appeal by the passenger. This notification will warn the passenger that another month of excessive violations will result in another 90-day suspension of service.

## **11. APPEALS PROCESS FOR SANCTIONS**

### **11.1 Right to Appeal**

The passenger has the right to appeal a suspension of service or sanction. Passengers may bring an advocate or personal representative to the appeals hearing(s). Complimentary transportation will be provided both to and from appeals hearings.

### **11.2 No Action Before Resolution**

In no event will the sanction go forward until the final outcome of the appeals process is completed.

### **11.3 How to Start the Appeals Process**

**11.3.1. Step #1.** The passenger has fourteen (14) calendar days after the date of the suspension or sanction notification to appeal the suspension/sanction in writing. Review of the appeal will consist of an interview with the passenger.

**11.3.2. Step #2.** If the passenger disagrees with the decision made in Step #1, he/she may appeal that decision. To make an appeal, the passenger must send a written request to LAVTA. The passenger's written appeal must be received by LAVTA within fourteen (14) calendar days after the date of the written decision in Step #1.

## **12. APPEALS PROCESS FOR REASONABLE MODIFICATION REQUEST DENIALS**

### **12.1 Right to Appeal**

The passenger has a right to appeal a decision to deny a reasonable modification request. Passenger may start the appeal process by contacting LAVTA Customer Service phone line at 925-455-7500, or fill out the online Customer Service Form on LAVTA's website.

### **12.2 No Further Action Before Resolution**

If LAVTA has denied a passenger's request for a reasonable modification, this decision will remain effective until the final outcome of the appeals process is completed.

### **12.3 How to Start the Appeals Process**

#### **12.3.1. Receive Appeal from Customer (Clock Starts)**

#### **12.3.2. Notify the Director of Administrative Services, who will open investigation**

**12.3.2.1** Review all relevant documents, practices and procedures as well as discussions of the complaint with all affected parties to determine the nature of the problem.

**12.3.2.2** Begin investigation process within 10 business days.

#### **12.3.3. Additional Information Needed**

**12.3.3.1** If more information is needed to resolve the case, the Paratransit Planner will contact the complainant. The complainant must provide additional requested information within ten (10) business days of the date of the request.

#### **12.3.4. Closing the Case**

**12.3.4.1** If the investigator is not contacted by the complainant or does not receive the additional information within ten (10) business days of LAVTA's request, LAVTA can close the case administratively.

**12.3.4.2** A case also may be closed administratively if the complainant no longer wishes to pursue their case.

#### **12.3.5. LAVTA will issue a closure letter or a letter of finding (LOF).**

**12.3.5.1** A closure letter summarizes the complaint/appeal of a reasonable modification decision and states that the request was properly denied and that the appeal will be closed.

**12.3.5.2** A LOF summarizes the complaint/appeal of a reasonable modification decision and information obtained through the investigation, and whether action is taken.

**12.3.6. Notify LAVTA's Paratransit Planner for record keeping purposes**

**13. CUSTOMER COMPLAINTS AND COMMENTS**

To initiate LAVTA's customer complaint or comment process passengers should call the LAVTA Customer Service phone line at 925-455-7500, or fill out the online Customer Service Form on LAVTA's website.

# Application for ADA Paratransit Service

## IMPORTANT INFORMATION FOR APPLICANTS

**This packet includes information and forms you need to apply for WHEELS Dial-A-Ride paratransit eligibility. As part of the requirements of the Americans with Disabilities Act (ADA), paratransit service is provided by all public transportation systems. This special type of public transportation service is limited to persons who are unable to independently use regular public transit, some or all of the time, due to a disability or health related condition.**

In order to use ADA paratransit service, you must be certified as eligible. Eligibility is determined on a case-by-case basis. According to ADA regulations, eligibility is strictly limited to those who have specific limitations that prevent them from using accessible public transportation. All WHEELS fixed route buses have lifts or ramps for wheelchairs and for people who cannot climb stairs.

Your application may be approved for full eligibility (unconditional) or on a limited basis for some trips only (conditional eligibility). If you are found to be capable of using regular bus and rail transit for all trips, without the help of another person, you will not be eligible for paratransit.

**To apply for eligibility you must fully complete the attached application form.** We will review your ability to use accessible public transportation. After studying your application, we may need more information. We may need to:

- Contact you by phone
- Schedule a personal interview or a functional evaluation, or
- Consult with your doctor, health professional, or other specialist about your condition and abilities

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| <p><b>For:</b></p> <ul style="list-style-type: none"> <li>• <b><u>Braille,</u></b></li> <li>• <b><u>Large Print,</u></b></li> <li>• <b><u>Audio Tape,</u></b></li> <li>• <b><u>CD Text File</u></b></li> </ul> <p><b>Call 925-455-7555</b></p> | <p><u>Pleasanton residents older than 18 years old must sign up for Pleasanton Paratransit Service first as your primary service provider for trips within Pleasanton. Call 925-931 5376 for information.</u></p> |
|--|---|

**Mail/Return the completed application to:**

**WHEELS**

**1362 Rutan Court, Suite 100**

**Livermore, CA. 94551**

**Fax 925-443-1375**

**Email [ADAFORM@lavta.org](mailto:ADAFORM@lavta.org)**

The application must be properly and fully completed. As a part of the application process, Wheels requires an in-person interview. The in-person interview may include a functional test to determine your ability to take a public transit trip, such as being capable of walking to a bus stop, reading signs etc. Your application will be processed within 21 days after the complete application (including the doctor's verification on pages 11-13) has been received and the in-person interview conducted.

You will receive notice of your eligibility determination by mail. If you are certified as eligible, you will be eligible to travel throughout the nine-county Bay Area. If you do not agree with the eligibility determination, you have the right to appeal. Information on how to file an appeal will be included with your eligibility notice. If an eligibility determination takes longer than 21 days, you may be given eligibility that allows you to use the paratransit system until a final decision about your eligibility is made. This does not apply if, through inactions on your part, we are unable to complete the processing of your application.

## **INSTRUCTIONS FOR APPLICANTS**

1. Please **PRINT OR TYPE full responses to all of the questions** on the application form. Your detailed responses and explanations will help us make an appropriate determination. Be sure to **respond to ALL questions or your application will be considered incomplete**. Incomplete applications will be returned.
2. You are not required to attach additional pages or information. However, you may want to send other documents that you think will help us understand your limitations. **All information that you supply will be kept strictly confidential.**
3. **You must provide SIGNATURES in two places to complete the application:**
  - Certification for Personal Care Attendant ONLY if you answer "yes" or "sometimes" (Page 8)
  - Applicant Certification (Page 9)
4. In addition, if you need the assistance of a Personal Care Attendant, you must complete and return page 8.

For help with the application process or to check on the status of your application, call **925-455-7555**.

***Thank you***

**KEEP THIS PAGE FOR YOUR RECORDS**

# Please Print

## Personal/Contact Information

Name (first, middle, last):

\_\_\_\_\_

Home Address: \_\_\_\_\_ Apt. #: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Mailing Address (if different from home):

\_\_\_\_\_ Apt. #: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Pleasanton residents, are you already signed up with Pleasanton Paratransit Service?  Yes  No

Daytime Phone: (\_\_\_\_) \_\_\_\_\_ TDD/TTY: (\_\_\_\_) \_\_\_\_\_

Evening Phone: (\_\_\_\_) \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_\_

Birth Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  Female  Male

Primary Language (please check):  English  Other (specify) \_\_\_\_\_

### In case of emergency, contact:

1. Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Day Phone: (\_\_\_\_) \_\_\_\_\_ Eve. Phone: (\_\_\_\_) \_\_\_\_\_

2. Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Day Phone: (\_\_\_\_) \_\_\_\_\_ Eve. Phone: (\_\_\_\_) \_\_\_\_\_

**Tell Us About Your Disability / Health Related Condition**

**Please answer the following questions in detail – your specific answers to all the questions will help us in determining your eligibility.**

1. Which **disability or health related conditions** PREVENT you from using regular public transit (i.e. BART, bus, streetcar) without the help of another person?

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2. Explain **HOW** your condition prevents you from using regular public transit without the help of another person.

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3. When did you first experience the conditions you described above?  
 0-1 year ago     1 – 5 years ago     More than 5 years ago

4. Do the conditions you described change from day to day in a way that affects your ability to use public transit?  
 Yes, good on some days, bad on others.                       No, doesn't change.  
 Don't know.

5. Are the conditions you described:  
 Permanent                       Temporary until \_\_\_\_\_  
 Don't Know

## Tell Us About Your Capabilities and Usual Activities

6. Do you use any of the following mobility aids or specialized equipment?  
(Check all that apply):

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> None                          | <input type="checkbox"/> Arm Crutches                                    | <input type="checkbox"/> Respirator            |
| <input type="checkbox"/> Cane                          | <input type="checkbox"/> Power Wheelchair                                | <input type="checkbox"/> Communication Devices |
| <input type="checkbox"/> White Cane for Blind          |  | <input type="checkbox"/> Service Animal        |
| <input type="checkbox"/> Walker (with or without seat) |  |  |
| <input type="checkbox"/> Power Scooter                 | <input type="checkbox"/> Crutches  | <input type="checkbox"/> Manual Wheelchair     |
| <input type="checkbox"/> Leg Braces                    | <input type="checkbox"/> Portable Oxygen Tank or E-tank (small or large) |  |
| <input type="checkbox"/> Large Wheelchair              | <input type="checkbox"/> Other Aid _____                                 |  |

The next question relates to the size & weight of your mobility device. **WHEELS Dial-A-Ride (paratransit) vehicles are designed to accommodate mobility devices up to 30" wide and 48" long when measured 2" from the floor and weigh less than 600 lbs when occupied (mobility device and rider combined). WHEELS Dial-A-Ride may not be able to carry oversized mobility aids. This is for your own safety. If you think your mobility device is larger or heavier, we recommend you come in for an evaluation to determine if you can be accommodated on our vehicles.**

7. Based on the above description, is your mobility device oversized?  
 Yes       No       I don't know – Please contact Wheels for an in-person assessment at 925-455-7555.

Does your mobility device weigh less than 600 pounds when occupied?  
 Yes       No       I don't know – Please contact Wheels for an in-person assessment at 925-455-7555.

If your mobility device's total weight exceeds 600 pounds while occupied, would you be able to board separately from your mobility device without assistance?

- Yes       No

8. Please check the box that best describes your current living situation:

- I live independently (without the assistance of another person)  
 24 hour care or Skilled Nursing Facility

- Assisted Living Facility
- I receive assistance from someone that comes to my home to help with daily living activities (In-Home Supportive Services)
- I live with family members who help me
- Community care home/transitional housing

9. How far can you walk or travel in your wheelchair or scooter without the help of another person?

- Less than ½ Block
- Up to 2 Blocks
- 3-6 Blocks
- 7 or more Blocks

10. To better provide assistance, how long would it take you to go from your building's front door to a curbside parked paratransit vehicle?

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11. Can you travel alone and be left alone on the paratransit vehicle?

- Yes
- No

12. Can you wait alone at your pickup or dropoff location?

- Yes
- No

13. Do you have a cell phone that you can contact Dial-A-Ride with while waiting?

- Yes
- No

14. Which of the following statements best describes you if you had to wait outside for a ride? (*Check only one response*):

- I could wait by myself for ten to fifteen minutes
  - I could wait by myself for ten to fifteen minutes only if I had a seat and shelter
  - I would need someone to wait with me because
- 

### Tell Us About Your Travel Needs

15. How do you currently travel to your frequent destinations?

(*Check all that apply*):

- Buses
  - Paratransit
  - Drive myself
  - BART
  - Taxi
  - Ferry
  - Streetcar
  - Someone drives me
  - Other \_\_\_\_\_
-

16. Would you be able to get to and from the public transit stop nearest your home?

- Yes     No     Sometimes     Don't know where it is

*If no or sometimes, explain why:*

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17. Would you be able to grasp handles or railings, coins or tickets while boarding or exiting a transit vehicle?

- Yes     No     Sometimes     Don't know, never tried it

*If no or sometimes, explain why:*

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18. Would you be able to maintain balance and tolerate movement of a public transit vehicle when seated?

- Yes     No     Sometimes     Don't know, never tried it

*If no or sometimes, explain why:*

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19. Would you be able to get on or off a public transit bus if it has a lift, a ramp, or a kneeler that lowers the front of the bus?

- Yes     No     Sometimes     Don't know, never tried it

*If no or sometimes, explain why:*

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20. Would you be able to sit in a vehicle for up to one hour? Trip lengths vary depending on origin/destination and number of pick-ups.

- Yes     No    For how long \_\_\_\_\_

21. Which of the following statements best describes you?

*(Check only one response):*

- I have never used regular public transit  
 I have used regular public transit but not since the



**Certification for Personal Care Attendant**

A personal care attendant is someone whose help you need for daily life activities (eating, dressing, personal hygiene, carrying packages, finding your way, etc.). An attendant does not always have to be the same person.

WHEELS Dial-A-Ride drivers are not personal care attendants, nor does WHEELS Dial-A-Ride provide attendants.

**Do you travel with a personal care attendant?**

- Yes       No       Sometimes

**If yes or sometimes, complete all of the information below and sign.** WHEELS Dial-A-Ride reserves the right to contact your health care professional to verify your need for an attendant.

**Please Print**

Applicant's Name \_\_\_\_\_

Explain how your attendant helps you \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Verification**

I certify that due to my disability or health related condition, I require the services of a personal care attendant to assist me and travel with me when I use paratransit services. **I understand that fraudulently claiming to travel with an attendant to avoid paying for a fare for a companion may result in suspension of service.**

Signature \_\_\_\_\_ Date \_\_\_\_\_

## Applicant Certification

I **certify** that the information in this application is **true** and **correct**. I understand that knowingly falsifying the information will result in denial of service. I understand all information will be kept confidential, and only the information required to provide the services I request will be disclosed to those who perform the services.

**I understand that it may be necessary to contact a professional familiar with my functional abilities to use public transit in order to assist in the determination of eligibility.**

**Sign here:**

Applicant's signature \_\_\_\_\_ Date \_\_\_\_\_

**Did someone help you in filling out this form?**       Yes       No

May we contact this person for additional information?  Yes       No

If yes, Name: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Relationship: \_\_\_\_\_

Please Note: It is your responsibility to notify us if your disability improves enough to change your eligibility status. If your condition improves after you have been determined eligible or we discover you submitted false information, your eligibility could be suspended or you may be asked to re-apply.



**This concludes the applicant's portion of the form  
Pages 11 - 13 must be completed by a Licensed Medical or  
Mental Health Professional**

## Licensed Medical or Mental Health Professional Verification



**All regular fixed route Wheels buses are equipped with lifts or ramps for people who cannot climb stairs.** In accordance with the American's with Disabilities Act of 1990, paratransit service is available only for persons who, because of a disability, are **prevented** from using the regular accessible fixed route bus system. The individual could be prevented in either of the following ways: 1) is unable to independently get to and from a bus stop, on or off the bus, or successfully navigate to a destination or 2) is unable to understand how to complete a bus trip. Age or the inability to drive are not qualifying factors. This application is to verify that the applicant meets the eligibility requirements for paratransit service.

**This individual is applying for WHEELS Dial-A-Ride Paratransit Services.**

Applicant's Name: \_\_\_\_\_

Applicant's Date of Birth: \_\_\_\_\_

**You are a...(Please Check one)**

- Medical Doctor (MD or DO)       Optometrist       Psychologist (Ph.D)
- Physician Assistant               Chiropractor       Clinical Social Worker
- Nurse Practitioner                   Certified Orientation & Mobility Specialist
- Recreational, Physical, or Occupational Therapist
- MDS Nurse (Skilled Nursing Facility Only)

**Instructions:**

1. Please review the information contained on the application as provided by the Applicant or Applicant's representative.
2. For the benefit of the Applicant, answer the following questions as fully and accurately as possible. Please be specific when answering the questions. Incomplete answers will result in the application being returned to the applicant.
3. Please fax to Wheels at 925-443-1375 or return to the Applicant for their submittal.

All healthcare information will be kept confidential. Please call (925) 455-7555 if you have any questions. Thank you for your time and cooperation.

Wheels Dial-A-Ride Application-  
Medical Verification Section

1. Based on your knowledge of the Applicant's condition, is the information accurate?  
(Check one)

Yes                       No                       Somewhat

If you checked "no" or "somewhat", please explain:

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2. Please explain how the Applicant's disability prevents them from using the regular ADA accessible bus system. What specific conditions contribute to the Applicant's mobility and/or cognitive limitations? Please define the degree of impairment.  
(Reminder: Age and inability to drive are not qualifying factors)

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3. The disability that prevents the Applicant from accessing the regular bus system is:  
(Check one)

Permanent               Temporary - \_\_\_\_\_  
(Expected Date of Recovery)

4. If the Applicant does not use a mobility device, please skip to the next question.

The combined weight of the Applicant and mobility device is less than 600 lbs.

Yes                       No. If no, provide best estimate \_\_\_\_\_

5. Does the Applicant require a Personal Care Attendant (PCA) when traveling?

Note: A PCA is someone who is designated or employed by a person with a disability to assist that person in meeting his or her personal needs and/or to facilitate travel for a specific trip.

Yes                       No                       Sometimes

If sometimes, please explain:

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I HEREBY CERTIFY under penalty of perjury under the laws of the State of California that the information provided on the Professional Verification portion for this application is true and correct.

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| Licensed Professional Signature | License number | Date |
|---------------------------------|----------------|------|
| Printed Name: _____             |                |      |
| Organization: _____             |                |      |
| Address: _____                  |                |      |
| City, State, Zip: _____         |                |      |
| Phone: _____                    |                |      |

Thank you for your assistance in completing this form.  
Wheels, in accordance with the American's with Disabilities Act of 1990, will use the information provided to determine the applicant's eligibility for Paratransit Services.

**To submit this application**

Via Mail or In person:  
Wheels  
1362 Rutan Court, Suite 100  
Livermore, CA 94551

Via Fax:  
925-443-1375

**AGENDA**

**ITEM 7**



STAFF REPORT

**SUBJECT:** Alameda CTC – Affordable Student Transit Pass Program

**FROM:** Christy Wegener, Director of Planning & Communications

**DATE:** June 27, 2016

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**Action**

None – Information Only

**Background**

This staff report contains an update of the Alameda County Transportation Commission (Alameda CTC) Measure BB-funded Affordable Student Transit Pass Program.

**Discussion**

One of the key projects being funded from Measure BB is a pilot Affordable Student Transit Pass Program (Affordable STPP). The project aims to eliminate barriers to transportation access to and from schools to increase youth school attendance and engagement in extra-curricular activities; to increase transportation options for families; and, to increase student transit ridership. The Affordable STPP will test different models of student transit pass programs that will serve different geographical areas of Alameda County. The pilot program is funded for three years through Measure BB, the ½ cent sales tax passed by county voters in 2014.

To develop and administer the pilot program, Alameda County has been subdivided into four areas: North County, Central County, South County, and East County. The East County project area includes LAVTA's service area of Dublin, Pleasanton, and Livermore. For the first year of the program, eleven schools have been selected, at least two in each area of the county. Schools were determined using a variety of factors: economic need, availability of transit, and school readiness. To track long-term student usage, school pairing (middle to high school) was also considered.

In East County, the pilot student pass program will be deployed at a high school and a middle school: Livermore High School and East Avenue Middle School. The parameters of the East County pilot pass program are as follows:

- Monthly passes on Wheels will be given to all students qualifying for free or reduced lunch (~20% of all students)
- Reduced-priced monthly passes will be available for sale to all other students at both schools

- Alameda CTC will pay LAVTA for the full cost of each monthly pass distributed or sold (currently \$60 per pass, per month)
- Students will flash their student-body ID card to the bus driver. Drivers will be trained to confirm validity using a color-coded sticker and will track ridership for each school.
- LAVTA will be providing monthly statistics to Alameda CTC on the pass utilization at each school. LAVTA will work with Alameda CTC to determine the exact reports that will be needed for program evaluation.
- In 2017/2018, the passes are planned to move to Clipper.

**Action Requested**

None – Information only

**Attachments:**

None

**AGENDA**

**ITEM 8**



# FY2016 Goals, Strategies and Projects

Last Updated– June 21, 2016

# MANAGEMENT ACTION PLAN (MAP)

| Goal: Service Development   |   |       |                    |   |   |           |
|---|---|-------|--------------------|---|---|-----------|
| Strategies (those highlighted in bold indicate highest Board priority)  |   |       |                    |   |   |           |
| <ol style="list-style-type: none"> <li>1. <b>Provide routes and services to meet current and future demand for timely/reliable transit service</b></li> <li>2. Increase accessibility to community, services, senior centers, medical facilities and jobs</li> <li>3. <b>Optimize existing routes/services to increase productivity and response to MTC projects and studies</b></li> <li>4. <b>Improve connectivity with regional transit systems and participate in BART to Livermore project</b></li> <li>5. Explore innovative fare policies and pricing options</li> <li>6. Provide routes and services to promote mode shift from personal car to public transit</li> </ol> |   |       |                    |   |   |           |
| Projects  | Action Required   | Staff | Board Committee    | Target Date   | Status  | Task Done |
| Comprehensive Operational Analysis (COA)  | <ul style="list-style-type: none"> <li>• Development of RFP/Selection of Contractor</li> </ul>                  | DP    | Projects/ Services | Mar 2015  | → Project awarded to Nelson/Nygaard.  | X         |
|   | <ul style="list-style-type: none"> <li>• Completion of scope of work</li> </ul>                                 |       |                    | Feb 2016  | → Service Design Guidelines approved by Board. First and second round of public workshops completed. Comments on 3 service alternatives received. Draft preferred alternative created. P&S Committee has provided comment. <u>Board conducted public hearing, approved changes to fixed route system, a partnership with TNCs/Taxicabs, and directed staff to plan for driverless shuttles.</u> | X         |
|   | <ul style="list-style-type: none"> <li>• Approval of route improvements</li> </ul>                              |       |                    | Jun 2016  |   | X         |
| Short Range Transit Plan (SRTP is a 10-year plan)   | <ul style="list-style-type: none"> <li>• Create preferred alternative</li> </ul>                                | DP    | Projects/ Services | May 2016  | → Preferred alternative in draft form   | X         |
|   | <ul style="list-style-type: none"> <li>• Create 10-year SRTP based on direction of planning efforts.</li> </ul> |       |                    | → Kickoff meeting held with consultant team on August. Consultant rewrote COA to meet MTC SRTP specs. <u>Approved in May.</u> | X   |           |
| Long Range Transit Plan (LRTP is a 30 year plan)  | <ul style="list-style-type: none"> <li>• COA planning firm will conduct the LRTP</li> </ul>                     | DP    | Projects/ Services | Sept 2016   | → LRTP to be completed after approval of preferred alternative of COA. Fall of 2016.  |           |

| <i>Projects</i>      | <i>Action Required</i>   | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i>                        | <i>Status</i>   | <i>Task Done</i> |
|----------------------|--|--------------|------------------------|---|---|------------------|
| Schedule Development | <ul style="list-style-type: none"> <li>Develop timetables for each route, with time points, running times and schedules.</li> </ul>  | DP           | Projects/ Services     | Jun 2016                                  | → <u>Schedule development completed</u>   | X                |
| Fare Analysis        | <ul style="list-style-type: none"> <li>Evaluate fare analysis proposal of firm with best COA submittal</li> <li>Fare analysis conducted with COA/SRTP/LRTP project.</li> <li>Approval of fare changes</li> </ul>   | DP           | Projects/ Services     | Feb 2015<br><br>Apr 2016<br><br>Sept 2016 | → Fare analysis awarded to Nelson/Nygaard.<br><br>→ Draft fare analysis received by staff for comment. This project will coincide with the development of the Long Range Transit Plan in fall of 2016.  | X                |
| BART to ACE          | <ul style="list-style-type: none"> <li>Provide guidance on bus routes in four alternatives being considered as part of the environmental study. Coordinate with LAVTA COA/Short &amp; Long Range Planning. Establish Working Group to provide input on rail planning in region.</li> </ul> | DP           | Projects/ Services     | Jun 2016                                  | → Staff and Nelson/Nygaard providing ongoing feedback on bus routes/facilities within four alternatives. Feedback provided on street design in specific plan for development adjacent to BART station on Isabel. BART has released ridership projections for project. Awaiting public discussion.<br><br>→ Inaugural meeting of Altamont Regional Rail Working Group held. Legislation introduced in Sacramento. Working Group met in May and discussed opportunities to expedite and streamline the project. Next mtg is July 13 <sup>th</sup> . |                  |

| Projects  | Action Required  | Staff | Board Committee       | Target Date                    | Status   | Task Done |
|---|--|-------|-----------------------|--------------------------------|--|-----------|
| MTC<br>Plan Bay Area Update   | <ul style="list-style-type: none"> <li>• Provide technical expertise</li> <li>• Participate in public workshops to ensure Priority Development Areas and public transit in Tri-Valley area is adequately planned.</li> </ul> | DP    | Projects/<br>Services | May<br>2015<br><br>Jun<br>2016 | <p>→ MTC convened meeting with staff</p> <p>→ Project/budget spreadsheets submitted for business as usual model to 2040. Capital asset inventory and maintenance plan submitted. Info on route system submitted. <u>MTC working on draft environmental impact report for document.</u></p> | X         |
| ACTC<br>County Transit Study  | <ul style="list-style-type: none"> <li>• Serve on TAC and participate in public workshops.</li> </ul>  | DP    | Projects/<br>Services | Jun<br>2016                    | <p>→ Staff has attended TAC meetings and provided input on key activity centers in Tri-Valley and performance standards. Key activity center incorporated into LAVTA preferred alternative. <u>Study Completed.</u></p>  | X         |
| ACTC<br>Tri-Valley Integrated Park &<br>Ride Study                                      | <ul style="list-style-type: none"> <li>• Serve on TAC.</li> </ul>  | DP    | Projects/<br>Services | Dec<br>2016                    | <p>→ Kickoff meeting with DKS and project TAC held. DKS working on potential park &amp; ride locations/modeling. <u>Consultant currently modeling 4 P&amp;R locations in Tri-Valley. Project to conclude in fall of 2016.</u></p>  |           |
| CCTA:<br>I-680 Express Bus Study/I-<br>680 Transit Investment &<br>Transit Relief Study | <ul style="list-style-type: none"> <li>• Serve on TAC and participate in public workshops.</li> </ul>  | DP    | Projects/<br>Services | Apr<br>2015                    | <p>→ Projects are ongoing. Geographic focus on Walnut Creek to Dublin. Existing conditions report completed. Looked at full range from full BART to light bus. Enhanced bus/intelligent vehicle technology in corridor was preferred alternative.</p>                                      | X         |

| Projects   | Action Required   | Staff | Board Committee       | Target Date | Status  | Task Done |
|--|---|-------|-----------------------|-------------|---|-----------|
| Clipper Project  | <ul style="list-style-type: none"> <li>• Policy development</li> <li>• Site work</li> <li>• Installation</li> <li>• Implementation</li> </ul>   | DP    | Projects/<br>Services | Jul 2015    | → Day Pass Accumulator Approved. Amended MOU approved.  | X         |
|  |   |       |                       | Jul 2015    | → Site work has been finished. Equipment install completed on buses. Testing in progress. Employers in Tri-Valley being notified of Clipper progress. | X         |
|  |   |       |                       | Sept 2015   | Training of on-board and ticket-office terminal equipment done. Customer service and operator training done.  | X         |
|  |   |       |                       | Nov 2015    | →Customer service training occurred in early October. Operator training done. Go-live successful on Nov 1, 2015.                                      | X         |
| Dublin Signalization improvements, queue jumps on Dublin Blvd  | <ul style="list-style-type: none"> <li>• Feasibility study for queue jumps on lanes</li> <li>• Secure final FTA approvals and transfer the FHWA funds to FTA to admin</li> <li>• Engineering of signalization improvements and queue jumps</li> </ul> | DP    | Projects/<br>Services | Jan 2016    | →Scope of Work completed. Feasibility study by Kimley Horn completed. <u>3 intersections identified for queue jumps.</u>                              | X         |
|  |   |       |                       | Mar 2016    | →FTA moved to TRAMs from TEAM program.  | X         |
|  |   |       |                       | July 2017   | → <u>RFP for active signalization project on street. Board award in July. Queue Jump project to follow active signalization project.</u>              |           |
| <p><i>Goal:</i> Marketing and Public Awareness</p> <p><i>Strategies (those highlighted in bold indicate highest Board priority)</i></p> <ol style="list-style-type: none"> <li><b>1. Continue to build the Wheels brand image, identity and value for customers</b></li> <li>2. Improve the public image and awareness of Wheels</li> <li>3. Increase two-way communication between Wheels and its customers</li> <li><b>4. Increase ridership, particularly on the Rapid, to fully attain benefits achieved through optimum utilization of our transit system</b></li> <li>5. Promote Wheels to New Businesses and residents</li> </ol> |   |       |                       |             |   |           |
| Projects   | Action Required   | Staff | Board Committee       | Target Date | Status  | Task Done |

Underlined text indicates changes since last report.

| Projects                    | Action Required  | Staff | Board Committee    | Target Date                       | Status   | Task Done |
|-----------------------------|--|-------|--------------------|-----------------------------------|--|-----------|
| Website Redesign            | <ul style="list-style-type: none"> <li>Develop/Advertise RFP/Evaluate proposals/execute contract</li> <li>New website goes live</li> </ul>                       | DP    | Projects/ Services | Mar 2015                          | →RFP advertised. Planeteria awarded contract   | X         |
|                             |  |       |                    | Dec 2015                          | → Draft final version of website reviewed by staff. Final graphics and design work being performed. New website is live.   | X         |
| Social Media Engagement     | <ul style="list-style-type: none"> <li>Development of LAVTA goals with Facebook/Twitter</li> </ul>   | DP    | Projects/ Services | Jun 2016                          | → <u>Recrafting goals with Social Media engagement. Interns posting on Facebook with staff. Goal is 3 to 5 posts/week.</u>   | X         |
| Phone App w/Real Time Info  | <ul style="list-style-type: none"> <li>MTC reviewing funding availability on secured grant.</li> <li>Create scope of work/RFP</li> <li>Phone app live</li> </ul> | DP    | Projects/ Services | Mar 2015<br>Jul 2016<br>Sept 2016 | → Funding has been allocated and staff is awaiting MTC clearance to begin project. <u>Release of phone app RFP this summer for fall launch.</u>                                      | X         |
| Google Transit Trip Planner | <ul style="list-style-type: none"> <li>Submit data for review/approval to Google</li> <li>Go live with planner on new website</li> </ul>                         | DP    | Projects/ Services | Sept 2015                         | → Most trip planning in US is done through Google Trip Planner. Google Trip Planner available online. Will be on homepage of new website, which is scheduled to go live in December. | X         |
|                             |  |       |                    | Oct 2015                          |  | X         |

Underlined text indicates changes since last report.

| Projects                                    | Action Required  | Staff | Board Committee    | Target Date          | Status  | Task Done |
|---|--|-------|--------------------|----------------------|---|-----------|
| Wayfinding at BART Stations                 | <ul style="list-style-type: none"> <li>Plan new wayfinding signage</li> <li>Seek funding</li> </ul>  | DP    | Projects/ Services | Feb 2015             | → Staff has taken pictures and provided conceptual of wayfinding signage to BART.   | X         |
|   |  |       |                    | Jun 2016             | → <u>Signage budgeted in FY2017 budget.</u>   | X         |
| High School Ambassador Project              | <ul style="list-style-type: none"> <li>Finalize program</li> <li>Appoint ambassadors and train</li> <li>Implementation of program</li> </ul> | DP    | Projects/ Services | April 2015           | → Applications for Ambassadors being developed for all high schools. No students signed up for program. Regrouping for sign-ups in September.<br><br>→ Five applicants selected. Training of ambassadors performed in December. 50 students mentored on how to ride the bus thus far. | X         |
|   |  |       |                    | Aug/Sept 2015        |   | X         |
|   |  |       |                    | Oct 2015             |   | X         |
| LAVTA Rebranding Project                    | <ul style="list-style-type: none"> <li>Create RFP</li> <li>Award consultant</li> <li>Finish project</li> </ul>                               | DP    | Projects/ Services | Jan 2016             | → Project to look at agency logo, naming and logos of services, and bus paint/graphics design. <u>PAVLOV awarded contract. Kick off mtg held. Surveys currently be taken. First meeting with Board held in June. Draft rebranding ideas to be presented to LAVTA Board in Sept.</u>   | X         |
|   |  |       |                    | Mar 2016             |   | X         |
|   |  |       |                    | Jun 2016             |   |           |
| Comprehensive Dial-A-Ride Rider Publication | <ul style="list-style-type: none"> <li>Review dial-a-ride policies</li> <li>Publisher to design and create publication.</li> </ul>           | DP    | Projects/ Services | May 2017<br>Jun 2017 | → <u>Project moved to FY17 following the comprehensive study of paratransit services.</u>   |           |
|   |  |       |                    |                      |   |           |

Underlined text indicates changes since last report.

| <i>Projects</i>  | <i>Action Required</i>  | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i>   | <i>Task Done</i> |
|--|---|--------------|------------------------|--------------------|---|------------------|
| Dial-A-Ride Customer Service Survey  | <ul style="list-style-type: none"> <li>Hire consultant/Develop Survey/Conduct Survey</li> </ul>   | DP           | Projects/ Services     | Oct 2015           | → Scope of work finalized. RFQ will be issued the week of 9/21. Awarded to Invictus. Survey completed and being presented in Nov committee meeting.   | X                |
|  | <ul style="list-style-type: none"> <li>Report to Board survey results</li> </ul>  |              |                        | Nov 2015           |   | X                |
| <p><b>Goal: Community and Economic Development</b></p> <p><b>Strategies (those highlighted in bold indicate highest Board priority)</b></p> <p>1. Integrate transit into local economic development plans</p> <p>2. Advocate for increased TOD from member agencies and MTC</p> <p><b>3. Partner with employers in the use of transit to meet TDM goals &amp; requirements</b></p> |   |              |                        |                    |   |                  |
| <i>Projects</i>  | <i>Action Required</i>  | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i>   | <i>Task Done</i> |
| ACTC: Measure BB Transit Student Pass Program  | <ul style="list-style-type: none"> <li>Attend ACTC meetings on student pass program development.</li> <li>Assist in the development of a timeline for policy and project implementation</li> </ul>  | DP           | Projects/ Services     | Jun 2016           | → Staff assisted ACTC in interviewing/scoring the potential consultants. Contract awarded to Nelson/Nygaard. <u>Livermore HS, East Middle School chosen. Program to begin in the fall. Free pass based on income. All others can receive a discount.</u>  | X                |
|  |   |              |                        | Sept 2016          |   | X                |
| Las Positas College Student, Faculty, Staff Pass Program   | <ul style="list-style-type: none"> <li>Discuss financing of pass program, including student fee and potential demonstration project</li> <li>Implementation of pass demonstration project to coincide with implementation of COA improvements.</li> </ul> | Exec Dir     | Projects/ Services     | Nov 2015           | → Researching appropriate method to introduce easy pass. 9,000 students. Chabot college vote failed. Made presentation to Student Senate in Sept. Met with administration in Dec to discuss Easy Pass 1-year pilot program that could coincide with implementation of improvements. <u>Easy Pass demonstration project moving forward, LAVTA to front Easy Pass for 1-year, with goal being to explore ridership potential and find long term funding for permanent pass.</u> | X                |
|  |   |              |                        | Apr 2016           |   | X                |

| Projects | Action Required | Staff | Board Committee | Target Date | Status | Task Done |
|----------|-----------------|-------|-----------------|-------------|--------|-----------|
|----------|-----------------|-------|-----------------|-------------|--------|-----------|

**Goal: Regional Leadership**

*Strategies (those highlighted in bold indicate highest Board priority)*

- 1. Advocate for local, regional, state, and federal policies that support mission of Wheels**
2. Support staff involvement in leadership roles representing regional, state, and federal forums
3. Promote transit priority initiatives with member agencies
4. Support regional initiatives that support mobility convenience

| Projects                             | Action Required  | Staff    | Board Committee    | Target Date | Status   | Task Done |
|--------------------------------------|--|----------|--------------------|-------------|--|-----------|
| Altamont Regional Rail Working Group | <ul style="list-style-type: none"> <li>• Creation of Advocacy Group</li> </ul>   | Exec Dir | Projects/ Services | Oct 2015    | → <u>Second ARRWG meeting held. Presentation by Foothill Gold Line Extension. Next meeting in July.</u>  | X         |
|                                      | <ul style="list-style-type: none"> <li>• Establish goals and regular meeting schedule</li> </ul>                                     |          |                    | Jan 2016    |  | X         |
| 2016 Legislative Plan                | <ul style="list-style-type: none"> <li>• Research on common issues within regional planning agencies and transit agencies</li> </ul> | Exec Dir | Finance/ Admin     | Dec 2015    | → Research being done on emerging priorities at state and federal level. 2016 Legislative Plan approved by Board in January. Staff monitoring new legislative cycle. | X         |
|                                      | <ul style="list-style-type: none"> <li>• Creation of 2016 Legislative Plan and review/approval by the Board</li> </ul>               |          |                    | Jan 2016    |  | X         |

**Goal: Organizational Effectiveness**

*Strategies (those highlighted in bold indicate highest Board priority)*

1. Promote system wide continuous quality improvement initiatives
2. Continue to expand the partnership with contract staff to strengthen teamwork and morale and enhance the quality of service
- 3. Establish performance based metrics with action plans for improvement; monitor, improve, and report on-time performance and productivity**
4. HR development with focus on employee quality of life and strengthening of technical resources
5. Enhance and improve organizational structures, processes and procedures to increase system effectiveness
6. Develop policies that hold Board and staff accountable, providing clear direction through sound policy making decisions

| <i>Projects</i> | <i>Action Required</i> | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i> | <i>Task Done</i> |
|-----------------|------------------------|--------------|------------------------|--------------------|---------------|------------------|
|-----------------|------------------------|--------------|------------------------|--------------------|---------------|------------------|

| <i>Projects</i>                 | <i>Action Required</i>   | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i>  | <i>Task Done</i> |
|---------------------------------|--|--------------|------------------------|--------------------|--|------------------|
| Trapeze Viewpoint Software      | <ul style="list-style-type: none"> <li>Work through custom software issues</li> </ul>  | DP           | Projects/ Services     | Dec 2015           | → Software installed at LAVTA. Custom reports being created with assistance of Trapeze. Bugs identified and fixed. Staff actively using software to monitor OTP and for planning activities. | X                |
| Performance Metrics Improvement | <ul style="list-style-type: none"> <li>Staff setting up aggressive monitoring of key performance metrics. <i>Focus on actions to improve on time performance (OTP).</i></li> </ul> | DP           | Projects/ Services     | July 2016          | → Changes made to routes 70X, 15, 53, 54, 3. Incentive program established with drivers. Tracking of OTP and operators leaving yard on-time happening on a daily basis.                      | X                |

**Goal: Financial Management**

*Strategies (those highlighted in bold indicate highest Board priority)*

- 1. Develop budget in accordance with strategic Plan, integrating fiscal review processes into all decisions**
2. Explore and develop revenue generating opportunities
3. Maintain fiscally responsible long range capital and operating plans

| <i>Projects</i>                   | <i>Action Required</i>  | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i>  | <i>Task Done</i> |
|-----------------------------------|---|--------------|------------------------|--------------------|--|------------------|
| Leasing Opportunities at Atlantis | <ul style="list-style-type: none"> <li>Conduct outreach to private and non-profit organizations.</li> <li>Work with agency attorney to bring good offers to the Board for consideration.</li> </ul> | Exec Dir     | Finance/ Admin         | Nov 2015           | → LAVTA and Google staff working on final version of lease agreement. Attorneys have approved agreement. Agreement signed in December. Google has begun to use the facility. | X<br>X           |

| Projects  | Action Required   | Staff | Board Committee    | Target Date          | Status   | Task Done |
|---|---|-------|--------------------|----------------------|--|-----------|
| FY15 Comprehensive Annual Financial Report                  | <ul style="list-style-type: none"> <li>Complete financial audit and all required reporting to Board, local, regional and state agencies.</li> </ul>   | DA    | Finance/ Admin     | Dec 2015             | → Audit completed Oct 2015. Final presentations to Board Dec 7, 2015. 19 <sup>th</sup> year of excellence in reporting.  | X         |
| <i>Other:</i>   |   |       |                    |                      |  |           |
| Bus Shelter Rehab/Replacement Project                       | <ul style="list-style-type: none"> <li>Refinish Rapid bus shelter benches</li> <li>Dozens of bus shelters throughout the system have reached their life expectancy and are in need of rehabilitation or replacement.</li> </ul> | DA    | Projects/ Services | Oct 2016<br>Dec 2016 | <p>→ Glass/stripping repair of Rapid shelters completed. 43 benches to be rehabbed in Spring, Summer, Fall of 2016. <u>Project pushed to 2017 to deal with COA changes.</u></p> <p>→ Bus stop inventory of current conditions completed. Planning underway to phase rehabilitation of shelters. <u>RFP to be posted in July for new shelter maintenance contact.</u></p> |           |
| Security Lighting at Transit Facilities (Bus Shelters)      | <ul style="list-style-type: none"> <li>Purchase security lighting in/at bus shelters in high priority areas</li> <li>Install lighting. Focusing on key corridors with a high level of evening service.</li> </ul>               | DA    | Projects/ Services | Mar 2016<br>Aug 2016 | <p>→ Funded through FY14 &amp; FY15 CalOES Security Program ,(Total \$73,392). Funds released Jan '16.</p> <p>Installation will focus on key corridors identified and programmed for night service in COA.</p>   |           |
| Replace Info Stations on Kiosks at Livermore Transit Center | <ul style="list-style-type: none"> <li>Get quotes for repairs and complete project</li> <li>Replace Info Stations at Kiosks</li> </ul>  | DA    | Projects/ Services | Dec 2015             | → Info kiosks at Livermore Transit Center have been vandalized over several years. Staff replacing 12 custom info stations on kiosks. Info stations arrived and were installed in October.   | X<br>X    |

| Projects  | Action Required   | Staff          | Board Committee    | Target Date           | Status   | Task Done |
|---|---|----------------|--------------------|-----------------------|--|-----------|
| Historic Train Depot Relocation at Livermore Transit Center | <ul style="list-style-type: none"> <li>Negotiate acceptable terms for rehab of Depot to be used for customer service.</li> <li>Create agreement</li> </ul>                            | Exec Dir / GPM | Projects/ Services | Sept 2015<br>Nov 2015 | →LAVTA has been meeting regularly with City staff. Environmental work nearing completion. Final location set for passenger island. Agreement signed in November. Working with A/E team on electrical, security, interior and circulation design issues. <u>FTA approved City contribution to pay off federal interest. Planning Commission approved project. City working on title transfer for property that will be under Depot.</u> | X<br>X    |
| 2016 Gillig Bus Purchase (20 buses)                         | <ul style="list-style-type: none"> <li>Board approval of purchase. Purchase order and notice to proceed to Gillig.</li> <li>Final details for buses performed with Gillig.</li> </ul> | DA             | Projects/ Services | Aug 2015<br>Aug 2016  | → Approval granted in mid-2014. Purchase order and notice to proceed provided to Gillig.<br>→LAVTA met with Gillig in Dec to finalize details on buses. <u>Buses scheduled for deliver in July and August of 2016.</u>   | X<br>X    |
| 2017 Gillig Bus Purchase (20 buses)                         | <ul style="list-style-type: none"> <li>LAVTA releases RFP for minimum of 20 hybrid replacement buses</li> <li>Board award to manufacturer</li> </ul>                                  | DA             | Projects/ Services | Jun 2016<br>Sept 2017 | → RFP has been advertised. Electric bus option within the RFP. <u>Four proposals received and being reviewed/scored. Anticipate Board consideration of award in September.</u>   | X         |

Underlined text indicates changes since last report.

| <i>Projects</i>  | <i>Action Required</i>   | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i>               | <i>Status</i>   | <i>Task Done</i> |
|--|--|--------------|------------------------|----------------------------------|---|------------------|
| Atlantis Phases I, II Fare Vault Project   | <ul style="list-style-type: none"> <li>• Phases I and II completed with exception of \$134,000 in miscellaneous projects (funded).</li> <li>• Select vendor for Fare Vault.</li> <li>• Select engineer for design</li> <li>• Bid and perform construction. Close grant.</li> </ul>                           | DA           | Projects/ Services     | Feb 2015                         | →\$134,000 left for future improvements. Fare vault is selected as project.   | X                |
|  |  |              |                        | Nov 2015                         | → Genfare GFI selected vendor. Will complete work in June.  | X                |
|  |  |              |                        | Nov 2015                         | → OLMM selected engineer. Engineering work completed.   | X                |
|  |  |              |                        | Jul 2016                         | → Vault delivered. Looking for installation date.   |                  |
| Atlantis Security Video Equipment Project  | <ul style="list-style-type: none"> <li>• Identify and spec the type of security system desired at Atlantis. To include license plate camera.</li> </ul>  | DA           | Projects/ Services     | Dec 2015<br>Jan 2016<br>Mar 2016 | → Cal OES transit security grant, funding by Prop 1B. - \$36,696. Project completed in first week of March.   | X                |
| Rutan Rehabilitation Projects (Shop Floor and Parking Lot Rehab/ADA Improvements). | <ul style="list-style-type: none"> <li>• \$537,000 grant awarded for shop floor replacement and for parking lot improvements.</li> <li>• Initiate and execute procurement for Shop Floor Replacement.</li> <li>• Initiate and execute procurement for parking lot slurry sealing and ADA upgrades</li> </ul> | DA<br>DA     | Projects/ Services     | Dec 2015<br>May 2016<br>Jun 2016 | <p>→ Grant funds available</p> <p>Shop Floor<br/>→ IFB issued. Ryan Co. awarded contract. Some delays with construction schedule. Expect Jun, Jul, Aug for 130 days construction timeline.</p> <p>Parking Lot Rehab/ADA Upgrades<br/>→Kimley Horn engineering work completed. Project out to bid. Anticipate Sept completion date for lowest price.</p> | X                |

| <i>Projects</i> | <i>Action Required</i>   | <i>Staff</i> | <i>Board Committee</i> | <i>Target Date</i> | <i>Status</i>  | <i>Task Done</i> |
|-----------------|--|--------------|------------------------|--------------------|--|------------------|
| Rapid Projects  | <ul style="list-style-type: none"> <li>Identify remaining projects to fix productivity issues on Rapid. Also complete Rapid shelters.</li> </ul> | Exec Dir     | Projects/ Services     | Jun 2016           | → Approximately \$300,000 in federal funding remaining for Rapid project. Staff working with FTA on moving the 8 Rapid shelters in Rapid realignment with funding. |                  |

**AGENDA**

**ITEM 9**



# LAVTA COMMITTEE ITEMS - JULY 2016 - NOVEMBER 2016

## Projects & Services Committee

### July

Minutes

Action      Info

X

\*Typically July committee meetings are cancelled

### August

Minutes

Action      Info

X

Quarterly Marketing

X

Quarterly Operations Report

X

Customer Satisfaction Report

X

### September

Minutes

Action      Info

X

Passenger Surveys

X

Fare Study Recommendations

X

Relocation of Livermore Historic Train Depot

X

### October

Minutes

Action      Info

X

Winter Service Changes

X

### December

Minutes

Action

X

### November

Minutes

Action      Info

X

SRTP or Mini SRTP

X