

Proposal for Consultant Services: Master Agreement for Strategic Planning and Related Services

Submitted to:



**Mr. James Hazlett, Master Agreement Program Administrator
Office of Strategic Initiatives
Chief Executive Office
500 W. Temple, Room 750
Los Angeles, CA 90012
jhazlett@ceo.lacounty.gov**

Submitted by:



**Heather Menninger, Principal
393 Two Trees Road
Riverside, CA 92507
V. (951) 784-1333
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Heather@AmmaTransitPlanning.com**

July 17, 2012

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393 Two Trees Road
Riverside, CA 92507

July 11, 2012

Mr. James Hazlett
Master Agreement Program Administrator
Office of Strategic Initiatives
500 W. Temple, Room 750
Los Angeles, CA. 90012

Voice: (951) 784-133
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Mail@AmmaTransitPlanning.com
www.AmmaTransitPlanning.com

Dear Mr. Hazlett:

On behalf of AMMA Transit Planning, I respectfully request consideration of this proposal for execution of a Master Agreement for Strategic Planning Services with the County of Los Angeles. AMMA Transit Planning is very specifically qualified to provide strategic planning related to **public transit and specialized transportation programs** operated by or on behalf of the County of Los Angeles. Furthermore, AMMA's business philosophy parallels the Los Angeles County mission "to enrich lives through effective and caring services." AMMA's 25-year focus has been on improvement of transportation, thereby improving the mobility of groups such as low income-families, older adults and persons with disabilities.

AMMA Transit Planning has directly relevant skills and experience in strategic planning, as it relates to public transportation and specialized transportation. Such services are used by transit dependent populations that include frail elderly and other older persons, persons with disabilities seeking employment, low-income single parents or homeless persons and newly returning veterans seeking to reintegrate into civilian lifestyles. As detailed in this proposal, AMMA Transit Planning is experienced on behalf of public transit and specialized transportation providers in the areas of:

- Strategic planning
- Performance measurement
- Customer services

AMMA has prepared numerous **strategic plans** that include the 2010 **County of Los Angeles Door Assistance Transportation Needs Assessment** for the County's Community Services Department's Aging and Adult Services. Other parallel efforts include development of **San Diego County's Strategic Transportation Business Plan** for its Aging and Independence Services; **Orange County's Non-Emergency Medical Transportation Strategic Plan and Implementation Plan** for Orange County Dept. of Health Services; and the preparation of the first strategic plan and five-year operations plan for the **Western Placer County Consolidated Transportation Services Agency**, on behalf of the Placer County Transportation Planning Agency. These are a few among others, including short range transit plans and comprehensive operational analyses which have strategic planning dimensions.

AMMA is currently preparing a new **transit performance measurement and monitoring program** for neighboring Riverside County. The anticipated **Riverside County Transportation Commission Performance Improvement Program** is built up from a reporting program AMMA developed for the County's specialized transportation providers. AMMA is now defining a program for use by the County's regional and municipal public transit operators. For adjacent San Bernardino County, AMMA articulated a strategic plan for communications and wrote the grant to secure Federal funding for the **Inland Empire One-Call/ One Click Veterans Transportation Project**.

Page two, July 2, 2012, Mr. James Hazlett

This communications project was one of just two such projects awarded in the State of California in the recent VTCLI projects, FTA's Veterans Transportation Community Living Initiative. AMMA is currently leading the Steering Committee that has oversight of implementation of this two-county effort, a dimension of which is to measure impacts upon and improvements to veterans transportation options.

Finally, AMMA has long-standing background in **training and customer-service oriented activities**. AMMA recently concluded a three-year contract to provide travel training through **Los Angeles Metro's Seniors on the Move (SOM)** program. The SOM provided transit familiarization training directly to hundreds of older adults across Los Angeles County. AMMA followed-up with survey contacts to trainees, to invite feedback and to measure training impacts and training satisfaction. AMMA has prepared other consumer-oriented tools to train new transit users or other transit advocates, including preparation of **AARP's Rural Transportation Toolkit** for its volunteers and **Trinity County Transit's web-based travel training** program to assist agency gatekeeper personnel and individual riders. Also of relevance, AMMA has a long-standing contract with the San Bernardino Associated Governments, since the early 1990's, with staffing and periodic consumer surveying associated with SANBAG's **Public and Specialized Transportation Advisory and Coordination Council**.

More information about the firm's experience and the qualifications of AMMA team members are detailed within this proposal, with additional information found at: www.AmmaTransitPlanning.com Three work samples are appended, including excerpts from the Riverside County Coordinated Transportation Plan Update, Placer County's Dial-a-Ride evaluation and the Los Angeles Metro Seniors On the Move Program Final Report.

While we have done our best to fully comply with your proposal submission requirements, as we understand them, I am happy to address any questions or provide any additional information that may be required. As a sole proprietorship, AMMA Transit Planning is certified by Los Angeles Metro as a small business enterprise/ disadvantaged business enterprise and has been since its formation in 1987. As owner and Principal, I am authorized to bind the firm:

Heather Menninger, Principal
AMMA Transit Planning
393 Two Trees Road
Riverside, CA. 92507
EIN 95-4205527

Heather@AmmaTransitPlanning.com
V (951) 784-1333 F (951) 784-1212

The AMMA team looks forward to hearing from you. We have rich and tested experience *in improving transit and transportation services through strategic planning* that is "implementable," and sustained through *effective performance measurement* and by *development of responsive customer services*. We propose to bring this skill set honed over years of experience and in settings throughout the western United States to the County of Los Angeles transportation services. Thank you for the opportunity to present AMMA's qualifications.

Sincerely,

Heather Menninger
Principal



PROPOSAL FOR CONSULTANT SERVICES: MASTER AGREEMENT FOR STRATEGIC PLANNING AND RELATED SERVICES

Table of Contents

	Transmittal Letter	iii-iv
3.	Firm Information	1
	A – C: Firm Information and Experience	1
	D: Current and Previous Contracts with Los Angeles County	2
	E: Contract Manager and Project Team	3
	F: Health Insurance	8
	G – K: Required Statements	8
4.	Work Statements	12
5.	Fee Schedule	19
6.	Financial Statements	20
7.	Additional Information	22
8.	Exceptions	38
	A. Exceptions to the RFP (Parts A, B, and C only)	38
	B. Exceptions to the Sample Contract (Part D only)	38
9.	Certifications and Assurances	39
	Form A – Proposer’s/ Bidder’s Certification	40
	Form B – Firm/ Organization Information, Los Angeles County / Community Business Enterprise (LAC/CBE) Sanctions	41
	Form C – Certification of Lobbyist Requirements	42
	Form D – Child Support Compliance Program Certification	43
	Form E – Consultant Services Client Reference	45
	Form F – County of Los Angeles Contractor Employee Jury Service Program Application for Exception and Certification	50
10.	Appendices – Work Samples	51
	A. Riverside County Public Transit-Human Services Coordinated Transportation Plan Update, Executive Summary	
	B. Placer County Dial-A-Ride Study, Chapter 4 - Evaluation of Existing Services	
	C. Los Angeles Metro Seniors On the Move Program, Final Report	



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PROPOSAL FOR CONSULTANT SERVICES: MASTER AGREEMENT FOR STRATEGIC PLANNING AND RELATED SERVICES

3. Firm Information

A – C: Firm Information and Experience:



AMMA Transit Planning is highly qualified to assist Los Angeles County in strategic planning, performance measurement and Training and Customer-Service Oriented Activities as it relates to specialized transit and transportation. A sole proprietor transit planning firm, AMMA has focused on community-level, public transit for 25 years, since 1987, particularly on paratransit and specialized transportations services. AMMA has provided consulting direction to dozens of studies and plans over more than two decades, ranging from regional and county-wide planning efforts to local service delivery operational analyses in urbanized, small urban and rural settings. Please visit our website to view additional information about AMMA's expertise: www.AmmaTransitPlanning.com.

Although based in Riverside, CA., since 2009, AMMA was in Claremont, CA. from 1987 until 2009 and has many rich working relationships with the numerous transit providers of Los Angeles County. AMMA's client base, although largely California, does include projects in Oregon, Arizona, Kansas and North Carolina. AMMA has participated in several national research projects including a current national Transit Cooperative Research Project on veterans transportation and development of a toolkit for AARP [American Association of Retired Persons].

Working most frequently with rural and small urban community transportation providers, AMMA's strengths lie particularly with the challenges of operating paratransit programs, Americans with Disabilities Act service and service modes to compliment main-line, fixed route transit service. AMMA's consulting engagements have largely focused on paratransit service planning, defining and improving specialized transportation services and encouraging public transit managers and policy-makers to address the requirements of their special needs users – albeit within cost-effective frameworks. Such users may be persons in wheelchairs, low-income single parents, consumers with behavioral health programs, frail and isolated older adults or able-bodied older persons interested in exploring local mobility options.

AMMA's projects often involve constructing mobility management and non-traditional transit strategies for specialized populations to improve mobility and increase access to job opportunities, schooling, health and human services and various life-enhancing activities.



Finally, AMMA’s background in human services has relevance to Los Angeles County’s concern for this “effective and caring services.” AMMA has developed strategic direction for human services organizations on transportation issues, including Ventura County and San Diego County behavioral health departments, San Bernardino County home delivered meals program, and Orange County Health Care Agency, among others. AMMA has provided analysis and support services to consolidated transportation services agencies (CTSAs) in the California counties of San Bernardino, Riverside, San Luis Obispo, Los Angeles, Butte and Placer, groups that are particularly consumer focused by design. In Placer County, AMMA designed a new strategic CTSA structure and menu of services which were promptly initiated and soon providing trips to consumers. We have just completed the first SRTP of this new organization, evaluating the projects the earlier study had proposed for implementation.

Organization

- AMMA Transit Planning is a woman-owned sole proprietorship, with Heather Menninger as its principal and owner. AMMA Transit Planning was a partnership from 1987 until 2003, when it evolved to a sole proprietorship following the death of Ms. Menninger’s husband and partner Tadashi Mayeda. Originally based in Los Angeles County from 1987 until 2009, the firm now operates from Riverside, CA.
- DBE: AMMA is certified as a disadvantaged business enterprise in the states of California, North Carolina, Kansas, Missouri, and Ohio and is certified as small business enterprise and women business enterprise in California.
- Business License: AMMA holds a current business license with the City of Riverside, CA.
- Insurance: AMMA holds general liability insurance, including comprehensive automobile insurance; and workers compensation insurances at required levels. AMMA’s professional liability policy is in the amount of \$500,000 coverage limits and we are requesting revision to the contract to reflect that, as further detailed in Section 8: Exceptions.

D: Current and Previous Contracts with Los Angeles County

AMMA has held one contract for similar services with Los Angeles County in the last three years. Details about this contract are provided below:

Los Angeles County Area Agency on Aging

Countywide Door-to-Door and Door-through-Door Mobility Needs Assessment and Operating Plan

Time Period: July 2009 – April 2010

Contract Amount: \$74,993

Project Manager: Alex McSweyn, Special Projects Director – Community Senior Services

(213) 738-2600 Office

(213) 220-4511 Cell



E: Contract Manager and Project Team

Contract Manager:

Heather Menninger, *Principal*, AMMA Transit Planning - Riverside, CA

Full-time, 1987 - Present



Expertise: Heather Menninger is principal and sole proprietor of AMMA Transit Planning, which since 1987 has specialized in improving small urban and rural transit programs for the range of constituencies they serve. She has undertaken dozens of consulting efforts related to smaller transit programs, usually focused on providing cost-effective demand responsive transit services to a breadth of rider groups. She he has also undertaken large county-wide transit planning efforts. Ms. Menninger has a deep understanding of public paratransit operations, from years of planning and performance assessment of services, conduct of comprehensive operational analyses and extensive work with the functions of providing demand response services. In numerous engagements on the inter-relationship of fixed-route and paratransit programs, she has worked to improve the mobility of the constituencies of demand responsive services, including ADA complementary paratransit and human services specialized transportation. Ms. Menninger has a *Master's Degree in Urban and Regional Planning* from California Polytechnic University at Pomona, a *Master's Degree in Human Services Management* from Brandeis University, Heller School of Social Welfare and a *Bachelor of Arts Degree* from Hampshire College, Amherst, MA.

Project Responsibilities: As Contract Manager for this project, Ms. Menninger will be responsible for all project deliverables and be the primary contact with Los Angeles County, except as specific project activities warrant direct interaction with other team members. With Mr. Glauthier, she will be responsible for policy-level presentations. Her specific responsibilities will relate to strategic planning – the construct, research and writing of deliverables, as well as project management and budgeting. Quality assurance is important to clean, effective products. AMMA's quality assurance process will be generally assured by Ms. Menninger, as she personally reviews all project deliverables.

Roy Glauthier, *Principal*, Transportation Planning and Policy, Costa Mesa, CA

AMMA Senior Associate, *Transit Operations, Policies and Procedures Specialist*, as needed based on project deliverables



Expertise: Roy Glauthier has consulted to the public transportation industry since the mid-1980's, undertaking hundreds of consulting projects across the country for large and small transit operators. Until 1996, Roy was with the DAVE Transportation organization as a Vice President, responsible for vehicle operations and performance in transit contracts that ranged from a half dozen to several hundred vehicles. Mr. Glauthier is well-versed in all aspects of effective and safe public transportation provision. He has a



particular facility for development of policy and procedures by which to ensure such effectiveness and safety. He has often detailed the path from strategic visioning to board adopted policy to the practice implemented on the road by drivers in relation to their passengers. Such a path is usually facilitated by clear, well-articulated procedures that are rigorously maintained.

Project Responsibilities: Mr. Glauthier will be the Co-Project Manager. He will have lead responsibility for transit operations/transit performance analysis and all such related activities. He will be responsible for strategic planning as it relates to transit budgeting or financial forecasting, working with Dennis Brooks on critical revenue and expenditure deliverables. He will have lead responsibility in reviewing and developing policies and procedures. With Ms. Menninger, he will be responsible for policy-level presentations.

Dennis Brooks, *Financial Analyst / Program Manager, AMMA Transit Planning – Riverside, CA*
Full-time, 2006 - Present



Expertise: AMMA Transit Planning's Financial Analyst / Program Manager, Dennis Brooks comes from a private sector background of sales and distribution where, among other responsibilities, he supervised and was responsible for the daily dispatching of 15 drivers and their on-time delivery of product. He has considerable financial and mathematical abilities which, coupled with his own highly organized style, enable him to provide strong analytic products that support the project efforts. Recent assignments include his ongoing monthly invoice concurrence responsibilities for Riverside County Transportation Commission's twenty two JARC and New Freedom projects, ensuring regulatory compliance and assurance of basic accounting practices for these specialized transportation projects.

He has been an employee of AMMA Transit Planning for nearly six years, since June 2006. Mr. Brooks has taken various community college-level courses, completed the Pepperdine University's *Transit and Paratransit Management Certificate* program and is an active participant in CalAct workshops.

Project Responsibilities: Dennis Brooks will provide critical support in a number of project areas and to project team members. Mr. Brooks will be responsible for quantitative evaluation of operating and budget data. Mr. Brooks has had lead responsibility for the collection and analysis of transit system data and for reviewing system budgets to develop assumptions for projecting expenses and revenues. Mr. Brooks will develop the demographics analysis and the financial analyses of possible project solutions. Finally, he will assist Ms. Menninger in the production of each project deliverable, responsible for quality assurance of AMMA's quantitative products. Mr. Brooks' personable style enables him to work easily and effectively with others, even at geographic distances, helping to keep the project moving forward and on-schedule.



Valerie Sedig, Analyst / Community Outreach Specialist, AMMA Transit Planning – San Francisco, CA
Part-time, 2009 – Present (Full-time May 2010- June 2012)



Expertise: AMMA's newest team member, Ms. Sedig, is a writer and public outreach coordinator/ facilitator. She brings experience from a range of service and technical settings, several involving working with the public. These taught her the rudimentary beginnings of cultural competency skills, the challenges of serving the public and an orientation to the value of procedure in ensuring work quality. In addition to development of written reports, Valerie supports AMMA through many coordination activities, survey development and written analyses of outreach and survey work. Ms. Sedig's recent AMMA assignments include assisting in the development of a Rural Transportation Advocacy Toolkit for the AARP; staff support to San Bernardino Associated Governments (SANBAG) in coordinating its 35 member technical advisory committee; and support to the Steering Committee of the Inland Empire Veterans Transportation Initiative One-Click/One-Call project. Ms. Sedig's strong analytic skills coupled with her friendly personality make her an effective and articulate communicator. Ms. Sedig received her Bachelor of Arts degree in World Literature and Cultural Studies from the University of California at Santa Cruz. She recently completed NTI's certificate course – Public Involvement in Transportation Decision-making. Ms. Sedig is currently pursuing a Master's Degree in Creative Writing at the University of San Francisco.

Project Responsibilities: As AMMA's Community Outreach Specialist, Ms. Sedig will coordinate and assist in facilitating customer service activities. She will play a key role in the development of qualitative analyses, including development and testing of surveys; conduct of survey efforts and contribute to their analysis. She may undertake interviews, consumer focus groups or special group discussions to invite feedback on services delivered.

Selena Barlow, Owner, Transit Marketing LLC - Tucson, AZ
Senior AMMA Associate, Marketing and Coordination Specialist, as needed based on project deliverables



Expertise: Ms. Barlow, the owner and manager of Transit Marketing LLC, has more than 25 years of experience marketing and developing public transportation services. Selena Barlow works exclusively within the public transportation industry and has clients throughout the U.S. Ms. Barlow's areas of expertise include: Community Outreach, Market Research, Development of Transit Marketing Plans and Campaigns, and Design and Production of Passenger Information Materials. Since the founding of Transit Marketing in 1988, Ms. Barlow has worked with more than 100 transit systems, urban, suburban and rural, always with the objective of making public transportation more accessible, easier to use and more attractive to a wide variety of target markets.



In recent years Ms. Barlow has put her communications and outreach skills to work in service of coordination efforts in Oregon and California. In San Bernardino County, California, an area that includes seven sub-regions ranging from urban, to small urban to rural, Ms. Barlow led an extensive county-wide outreach effort that expanded the reach and participation from that achieved by previous coordination efforts. She has also coordinated outreach and market research for coordination efforts in Orange County (CA), the Columbia Gorge region and Northeast Oregon.

Prior to the establishment of Transit Marketing, Ms. Barlow was Chief of Marketing for Metro Dade Transit Agency in Miami, FL, where she headed a comprehensive bus and rail marketing division which included advertising, promotion, public affairs, community services and passenger information branches. She also served as Director of Marketing for Sun Tran in Tucson, AZ where she was responsible for all aspects of marketing for a 150 bus system.

Ms. Barlow holds a Master of Business Administration, with focus on marketing, from the University of Arizona, and a Bachelor of Science in Advertising, from the School of Journalism at the University of Florida. She has been recognized for her transit marketing expertise with numerous APTA AdWheel Awards.

Project Responsibilities: For Los Angeles County efforts, Ms. Barlow will have several roles. She can devise the communications tools that help to communicate strategic plans or the specific marketing pieces that describe services and their parameters. With her well-honed communications skills, she may assist with customer-oriented activities that may help to define or modify services.

John Johnson, Owner, GIS Workshop – Encinitas, CA

AMMA Associate, GIS Mapping Specialist, as needed based on project deliverables



Expertise: John Johnson, owner of GIS Workshop, has a Master's Degrees in Urban & Regional Planning and Business Administration, an Undergraduate Degree in Geography and is a Certified ESRI ArcGIS Instructor. Since 1999 he has been the owner and operator of the GIS Workshop providing Geographic Information Systems consulting services (custom mapping, cartography, spatial analysis & training). Prior to this, he was employed as a land use planner, policy manager, real estate economist and teacher. Mr. Johnson has helped to develop two Community College GIS programs and is currently assisting the U.S. Department of Labor in defining workforce competencies for occupations in the new Geospatial Technology Competency Model (GTCM). He is currently the DACUM facilitator for the National Geospatial Technology Center.

Mr. Johnson has worked with AMMA since 2005, more than six years of experiences together to refine GIS tools that will inform transit and specialized transportation planning activities.



Project Responsibilities: Mr. Johnson will be responsible for geographic information mapping and 2010 Census related research as needed for agreed upon project deliverables. Mr. Johnson will also be available to assist AMMA in providing any additional research, data analysis and mapping support services that may support the proposed tasks.

Ellen Blackman, Principal, Ellen Blackman Consulting – Culver City, CA

AMMA Associate, Community Involvement Specialist, as needed based on project deliverables



Expertise: AMMA Associate Ellen Blackman has more than 20 years of experience focusing on transportation for older adults and persons with disabilities. For two years she developed a new transportation program for older adults in the greater Santa Monica area. A major part of this project-development involved community outreach and presentations to large and small groups of older adults discussing the new program and other forms of transportation available for older adults. Earlier, as a Metro employee, she initiated Metro funding for the Seniors on the Move program, worked with the Los Angeles County Commission on Aging Transportation Committee in the early development of the program, and made presentations on transportation options for seniors and persons with disabilities at workshops and meetings of seniors and persons with disabilities. She also participated on the Los Angeles County Long Term Care Coordinating Council, serving as co-chair of the Transportation Work Group. As a consultant, she has coordinated and led transportation orientation workshops at 18 senior centers, has assisted agencies in the preparation of applications for federal funding for capital grants for transportation of older adults and persons with disabilities, participated in the development of public transit-human service transportation coordination plans, and conducted research on information needs of persons with vision disabilities using public transportation.

Project Responsibilities: Ms. Blackman will be assist with various community outreach activities, including interviews, facilitating focus groups, and soliciting agency participation.

Terri Litchfield, Delaware, OH

AMMA Database and Website Support Associate, as needed based on project deliverables



Expertise: An AMMA associate since 1990, Terri Litchfield has been responsible for the design of numerous relational databases to facilitate analysis of collected survey data on behalf of AMMA clients that include County of San Diego, Santa Monica Municipal Bus Lines, Norwalk Transit System, City of Mission Viejo, and Riverside County Transportation Commission, among others. She has developed various special applications related to management of transportation-related information. Some major projects include database design and maintenance for the publication of the San Bernardino County Specialized Transportation Inventory published over a fifteen year period for the County Transportation Commission, a Paratransit Information Service for the Los Angeles County Transportation Commission (now LACMTA), and



development of various paratransit ADA rider registries for: City of Whittier, City of Barstow, Victor Valley Transit Authority, City of Downey. Terri holds a Bachelor of Arts in Mathematics from Anderson College and a Master's Degree in Mathematical Statistics and Computer Science from Ball State University.

Project Responsibilities: Ms. Litchfield will provide website and database support to the project, designing the on-line data entry capability for potential survey efforts, constructing the various project databases that will support the project's reporting capabilities, and setting up a possible project website should that become an agreed upon project deliverables.

F: Health Insurance

AMMA Transit Planning's Employee Policy Manual details AMMA's Health Insurance Policy as:

AMMA participates in a group health and dental plan through Kaiser Permanente and Delta Dental of California for small businesses. AMMA pays half of health insurance coverage through Kaiser Permanente for employees who have worked 32 hours or more per week for a period of at least four weeks.

G – K: Required Statements

G: Consideration of Gain Participants for Employment

AMMA Transit Planning is willing to comply with and provide for employment consideration of GAIN participants. AMMA is currently utilizing individuals who are re-entering the workforce, providing them with entry-level work and work experience by which to build both their resumes and their skill levels. AMMA has a long history of doing so. AMMA often has data entry requirements and periodic survey assistance requirements. While these are typically part-time, temporary positions, AMMA has a history of moving temporary, part-time individuals into continuing employment that is at and well above "living wage" levels. AMMA anticipates continuing to do so and actively seeking ways in which to coordinate with the GAIN and other similar programs around project-specific work opportunities.

H: Insurance and/or Performance Bond requirements

AMMA Transit Planning is will comply with the Insurance requirements noted in the Sample Contract: Part D, except for the exception regarding Section 36.4 as further detailed in Section 8 of this Proposal. No performance bond requirement was identified nor does AMMA expect to procure one.



I: Child Support Compliance Program

AMMA Transit Planning is willing to comply with the Child Support Compliance Program requirements as detailed in the Sample Contract, Part D.

J: Small Business Certification

AMMA Transit Planning is certified a DBE, SBE, and WBE by Los Angeles County Metropolitan Transit Authority (Metro), one of California's Unified Certification Program (UCP's) Certifying Agency. Our most recent certification letter follows.

K: Pending or Threatened Litigation

AMMA Transit Planning attests that there is no pending or threatened litigation against AMMA Transit Planning, nor has there ever been any litigation against AMMA.



SBE & WBE Letter



Los Angeles County
Metropolitan Transportation Authority

One Gateway Plaza
Los Angeles, CA 90012-2952

213.922.2000 Tel
metro.net

Metro

October 15, 2010

Metro File # 1107
Extension of Other Certifications

Heather Menninger
AMMA Transit Planning
393 Two Trees Road
Riverside, CA 92507

SUBJECT: Certification Extension

Dear Heather Menninger:

Please be advised of the extension of the following certification(s) for your firm to **December 31, 2013** to expire at the same time as your DBE:

- Small Business Enterprise (SBE)**
- Women Business Enterprise (WBE)**
- Minority Business Enterprise (MBE)**

You have the following NAICS 2007 code(s):

- 541611 - Administrative Management and General Management Consulting Services
- 485111 - Mixed Mode Transit Systems
- 485210 - Interurban and Rural Bus Transportation
- 485113 - Bus and Motor Vehicle Transit Systems
- 485991 - Special Needs Transportation
- 541720 - Research and Development in the Social Sciences and Humanities

If you have any questions, please contact us at (213) 922-2000.

Sincerely,

L. B. Wright
for Linda B. Wright

Deputy Executive Officer
Diversity & Economic Opportunity Dept.

Small Business Certification Unit
One Gateway Plaza, Mail Stop 90-132, Los Angeles, CA 90012-2952
Tel: 213-922-2000 Fax: 213-922-7969



DBE letter

CALIFORNIA UNIFIED CERTIFICATION PROGRAM DISADVANTAGED BUSINESS ENTERPRISE CERTIFICATE

A-M-M-A TRANSIT PLANNING

306 LEE AVENUE
CLAREMONT, CA 91711

Owner: **HEATHER MENNINGER-MAYEDA**
Business Structure: **SOLE PROPRIETORSHIP**

This certificate acknowledges that said firm is approved by the California Unified Certification Program (CUCP) as a Disadvantaged Business Enterprise (DBE) as defined by the U.S. Department of Transportation (DOT) CFR 49 Part 26, as may be amended, for the following NAICS codes:

NAICS Code(s) * Indicates primary NAICS code

- | | |
|---|--|
| * 485113 Bus and Other Motor Vehicle Transit Systems | 541611 Administrative Management and General Management Consulting Ser |
| 485111 Mixed Mode Transit Systems | 485991 Special Needs Transportation |
| 541720 Research and Development in the Social Sciences and Humanities | 485210 Interurban and Rural Bus Transportation |

Work Category Code(s)

- | | |
|--|---------------------------------------|
| C8700 CONSULTANT | E4110 LOCAL & SUBURBAN TRANSPORTATION |
| E4130 INTERCITY & RURAL BUS TRANSPORTATION | 18730 RESEARCH & TESTING SERVICES |

Licenses

CERTIFYING AGENCY:
LOS ANGELES COUNTY METRO TRANSPORTATION AUTHORITY (MTA)
ONE GATEWAY PLAZA
LOS ANGELES, CA 90012 0000
(213) 922-2600

UCP Firm Number : 29978



CUCP OFFICER November 13, 2008



4. Work Statements

Requested Services

Project Understanding

Los Angeles County is seeking assistance in helping to bring its multi-faceted departments and services into alignment with its adopted countywide Mission, Vision and Goals. This document sets forth the qualifications of AMMA Transit Planning and some general information as to the approach by which this firm would assist **Los Angeles County public transit and specialized transportation programs** with strategic planning, transit performance measurement and customer satisfaction assessment.

Just as the County as a whole operates many types of services and programs, so too are the transportation programs operated under the behest of the County. The Public Works Dept. has some level of funding and oversight responsibility for dozens of programs, as shown in Exhibit 1. These include fixed-route and shuttle type services, dial-a-ride programs, several recreational transportation services, a capital improvement program and a bus fare subsidy program.

The County has varying levels of responsibility for these services. In some cases it contracts directly for the program, with more direct oversight or supervision of the service. In other cases, County funds contribute to the operation of existing municipally operated transit programs, while County agreements and MOUs (memoranda of understanding) shape the County's expectations of the transit program, its

Exhibit 1, LA County Dept. of Public Works - LA GO BUS Programs

Los Angeles County Shuttle Routes	
Acton/Agua Dulce	Palos Verdes Peninsula Shuttle
Antelope Valley Transit	Santa Clarita transit
Avacado Heights/ Bassett/ W. Valinda Shuttle	South Bay's MAX Service
DASH Boyle Heights/ East LA	Sunshine Shuttle (South Whittier)
East Valinda Shuttle	Link: Athen
Edmund D. Edleman Children's Court	Link: Florence-Firestone/Walnut Park
El Sol (East Los Angeles) Shuttle	Link: King Medical Cener/ Willowbrook
Los Neitos Shuttle	Link: Lennox
Los Angeles County Dial-A-Ride Services	
<i>Directly Operated Services:</i>	
East Los Angeles	Whitter
Walnut Park	Willowbrook
<i>City Contracted Services:</i>	
Agoura Hills	Ladera Heights/ Baldwin Hills/ Viw Prk/ Windsor
Alondra Park/ Del Aire/ Camino Village	Lennox
Altadena/Kinelo Mesa/ E. San Gabriel	Marina Del Rey
Antelope Valley	Palos Verdes Peninsula
Avacado Heights/ Bassett/ Hacienda Hts.	Rancho Dominguez
Azusa/ Citrus/ Glendora	Rowland Heights
Calabasas/ East Malibu/ Topanga Cyn	Santa Clarita Valley
East Los Angeles/ City Terrace/ Belvedere Garden	South San Gabriel
Carson/ Long Beach	Valinda/Charter Oak/W. Covina/La Puente
Chatsworth/ West Hills/Kagel Cyn	Walnut Partk/ South Whittier
La Crescenta/ Montrose	Willowbrook/ Rosewood
Los Angeles County Recreational Transit Services	
Hollywood Bowl Park & Ride	Beach Shuttle
Ford Theatre Shuttle	Beach Bus
Transit Capital Projects	
Park & Ride Lots	Bus Stop Amenities Program
Bus Stop Improvemetnt Program	MetroLink Stations
Transit Bus Pass Subsidy Program	
Los Angeles County Transit Pass Subsidy Program Guidelines & Eligibility	



actual delivery is administered by other entities. This array of programs and of operating authority and responsibility in diverse areas across this large county makes it complicated to ensure that the County's vision, mission and goals are a dimension of transit service planning.

Similarly, transit performance measurement practices – and even goals associated with this important function – are likely to show considerable variety across these numerous services and programs. Assisting the County Dept. of Public Works in standardizing practices, where possible and appropriate, to conform with the County's overarching vision can have value. Importantly, effective performance measurement can contribute to improved customer services.



Additionally, other Departments within the County operate transportation programs, a number of which have secured federal transportation funding to support their services. For example, programs in the **Department of Community and Senior Services** secured Los Angeles Metro funding in two cycles under its Federal Transit Administration (FTA) New Freedom program (Section 5317) and the Job Access and Reverse Commute program (Section 5316). The **County's Aging and Adult Services Branch** have examined door-to-door and door-through-door transportation issues and needs. The **County's Workforce and Community Services Branch** was funded by the same process for a transportation needs assessment of lowest income county residents, seeking ways to help them secure employment transportation.

Also, for years smaller agencies that are either County contractors or are operating County programs have secured FTA vehicle capital grants under the Section 5310 program. Such programs operate a variety of transportation services – ***usually termed specialized transportation***. They may include senior center nutrition shuttles, community service programs, volunteer mileage reimbursement programs, door-through-door assistance services or Mobility Management functions.

Such specialized transportation programs share the same challenges as does the Dept. of Public Works programs, in that alignment with Countywide vision, mission and goals may be difficult. Strategic planning may be limited. Common performance measurement is unlikely and determining outcomes usually is limited or constrained. Assurance of customer satisfaction may or may not be a part of the program design or of program evaluation processes.

As detailed further below, AMMA Transit Planning has significant qualifications by which to assist these various Los Angeles County transportation programs in:

1. development of ***transit services' strategic planning*** to ensure programs remain responsive to larger goals and purposes;
2. working with transit and ***transportation performance evaluation and monitoring***;
3. involving the various constituencies that are the focus of such services to improve or enhance services, using ***transit customer input and training to inform strategic planning*** of transportation services.



Strategic Planning

The County of Los Angeles seeks assistance in development of departmental strategic plans to reflect the goals, strategies and objectives of the County's Strategic Plan of Mission, County Values and Goals. AMMA Transit Planning has significant experience in development of comparable strategic planning efforts for public transit operators and county transportation commissions, for aging services departments, behavioral health services, public health agencies and health care districts and for veterans transportation services programs.

Developing a Picture of Existing Conditions AMMA's general approach is to begin with an understanding of Existing Conditions, to understand and document the particular department's or program's service environment and constraints. Identifying service needs and gaps, as well as the resources available by which to address those must be catalogued. Typically, AMMA relies upon a mix of quantitative and qualitative tools to build a rich picture of existing conditions. This often involves significant public outreach and involvement, including surveying of users and interviews with key stakeholders.

Public Involvement The AMMA Transit Planning team has developed well-honed skills at public outreach, which is a key dimension of the strategic planning process. Public outreach and community involvement to inform development of a strategic plan will rely upon the following principles that AMMA has come to understand as:

- **Ensuring multiple opportunities and methods** to secure public input by going to the places and locations where the target groups exist;
- **Using a range of techniques to secure input**, including intercept surveying, telephone and mail surveying, community meeting and focused group discussions;
- **Ensuring that the language utilized** is appropriate for non-English speaking populations.
- **Ensuring that the process has integrity** and includes some form of "reporting back" to the communities of interest.

AMMA has developed strong skills at compiling public involvement responses and discerning the content that may inform a strategic planning process. AMMA prepared *Public Transit-Human Services Transportation Coordination Plans* for most of the Southern California counties, including Los Angeles, Riverside, Orange, Ventura and San Diego, as well as central and northern California's San Luis Obispo, Placer and Butte Counties. AMMA is currently involved in, or has completed the *Coordinated Plan Updates* for Riverside, San Bernardino and Ventura Counties. These plans relied heavily upon considerable public involvement to help shape the strategic direction of the resultant Coordinated Plan. The Executive Summary of Riverside County's Coordinated Plan is included as Appendix A.

Key Stakeholder Involvement Also critical to an accurate Existing Conditions report, and to establishing a sound basis for strategic planning, are interviews with key stakeholders. These might be agency heads, department managers and often front-line personnel, such as vehicle operators.



Typically, the AMMA team constructs an in-depth interview processes to secure detailed information about current practices. The AMMA team seeks to answer the basic questions of:

- What is working well?
- What is working poorly?
- What are we unsure about?

Such simple questions, when posed to those most directly involved in the delivery of these services, can provide a rich, starting-point picture of the operating environment. These key stakeholders are usually acutely aware of agency practice and this provides opportunity to assess any incongruence between adopted policy and how policy is implemented through day-to-day procedures. Such congruence – or the lack thereof – is important information to developing effective strategic planning.

Technical Analyses of Operations To inform a deeper picture of present operations, AMMA always seeks available quantitative information. This supplements and validates the softer, qualitative information sought from interviews and customer survey activities. Often documenting operations trends, and existing pattern of utilization point to the strategic goals to be embraced.

AMMA has long experience with solid technical analyses of transit operations. Such analyses may involve Geographic Information Systems (GIS) analysis to show where services are provided spatially, such as where passengers are traveling from or to, origin and destination analyses. They may involve descriptive statistical analyses, typically trend analyses to depict services over time such as ridership, unit costs, or revenue service hours. Appendix B shows an excerpt from a paratransit program evaluation in Placer County, including a number of technical analyses to help determine program effectiveness and define strategic direction for the next seven years.

Reviewing Service Goals to Establish Objectives and Implementation Guidelines These preceding steps help set the stage for creation of an effective strategic plan direction moving forward. The County of Los Angeles has done the difficult work of defining its five strategic goals, of:

1. Operational Effectiveness
2. Children, Family and Adult Well-Being
3. Community and Municipal Services
4. Health and Mental Health
5. Public Safety

A strategic planning process for transportation services must arrive at a direction that works from these goals towards improvement of services. Hopefully that entails moving forward existing “working” practices, while pulling into alignment any areas that distanced from the County’s larger mission and values or the process may point to where improvement and administrative attention are required. AMMA has done this in almost every study –hundreds of study products – over its twenty-five years in the business of evaluating community-level transportation programs. Every project, from the smallest agency-based assessment to large scale, countywide projects, requires that a direction be established



and the steps for getting there be delineated. Appendix D provides the executive summary for a *Door Assistance Needs Assessment AMMA* conducted for Los Angeles County. This document details an operating plan designed to meet goal statements that summarized the needs and gaps identified during the various process described above.

Performance Measurement

The effectiveness of any strategic plan will be assessed by the effectiveness of its performance measurement program. If it can be measured, it can be monitored. If it can be monitored, it can be improved. But there are important considerations. These include what information can be readily collected? What data is reliable? What indicators are meaningful in terms of the County goals and the program's objectives? What performance measurement will readily communicate to key stakeholders? And what happens when performance is going poorly, when indicators are not being met?

AMMA Transit Planning is currently assisting Riverside County Transportation Commission in developing a countywide performance improvement program, replacing a system that has been in place since the mid-1990s but is no longer very functional or reflective of current conditions. This new program is designed for greatest effectiveness, addressing such effective performance measurement attributes as:¹

- Stakeholder acceptance
- Linkage to agency goals
- Clarity
- Reliability and credibility
- Variety of measures; variety of dimensions measured
- Level of detail is appropriate
- Number of measures reasonable
- Flexibility
- Realistic ability to achieve goals or targets
- Timeliness
- Integrated into agency decision-making

Again, it becomes important to examine current operating practice in relation to these attributes. What is being measured now? What performance goals or targets exist and how is the program doing in relation to those? How realistic are these targets? Do the measurements best reflect the goals and objectives, as set forth historically or anticipated for a new strategic direction? Is the data that is collected reliable and valid? Are there mechanisms by which to use this information in on-going program administration and decision-making, thereby helping to ensure that the data collected and the performance reported is accurate?

¹ Adapted from TCRP Report 88: Guidebook for Developing a Transit Performance Measurement System (2009)



These are key issues to be addressed, both historically in terms of what has been in place, and for the future in the design of a new or improved performance measurement program that will help County of Los Angeles transportation programs achieve the outcomes they desire. AMMA's breadth of experience will contribute to design and implementation of effective performance measurement and reporting programs. Such effectiveness of the program will be informed by AMMA's experiences, as detailed in Section 3 of this proposal, that include:

- Working with large and small transportation programs;
- Working for traditional fixed-route and demand responsive modes and non-traditional specialized transportation programs;
- Working in rural settings, suburban communities and urban neighborhoods;
- Working for public agencies, non-profit organizations and private, for-profit entities.

Training and Customer-Service Oriented Activities

AMMA Transit Planning has consistently led with development of a customer-based understanding of services for purposes of improving transit and transportation programs. Identifying needs from the rider's viewpoint is a critical building block in designing improved services. Most of AMMA's projects have included one or all of the following:

- rider surveys, conducted either on-board or in intercept settings,
- rider focus group discussions, for small-group and targeted discussions
- rider telephone surveys, to solicit statistically-valid customer viewpoints
- rider advisory group input, to invite comment through the process of developing improvement plans or strategic planning direction.

Establishing an effective customer service feedback mechanism is an important element of any on-going program. Customer comments help to determine whether or not, in fact, operational objectives are being met. Customer complaints and compliments help to inform the system about its strengths and weaknesses. There must be formalized means for inviting customer comment. There must also be recognized mechanisms for responding to these comments.

For more than two decades, AMMA Transit Planning has provided staffing support to the San Bernardino County transportation commission, SANBAG, for the County's **annual unmet transit needs hearing process**. This involves the design and conduct of procedures to: facilitate annual hearings in three or four locations around the county; notice and outreach to help get people to these hearings or commenting via other means; the careful recording of comments received; the construct of meaningful responses to comments received; and the distribution back to hearing participants of the SANBAG's deliberations.



Training is a critical element of performance reporting generally, and of implementation of effective procedures that involve customer service input specifically. During this past year, for the City of Greensboro, North Carolina, the AMMA team **developed and then conducted training for revised operating procedures** by which the City's transit programs were to operate. This overall effort was prompted by significant customer concern and complaint about Greensboro Transit's operational practices. Critical steps to designing new services included formalizing certain practices into Board-adopted policy and procedure and involving the public through a variety of workshops, public meetings and focus group discussions throughout the process. There were training and orientation activities related to the new practices throughout the system. AMMA designed and conducted workshops for the Board of Directors, administrative staff and for riders and their advocates. AMMA's resultant *Greensboro Transit Policy and Procedure Manual* – with each policy individually posted on the agency's website to facilitate updating – can be found at:

<http://www.greensboro-nc.gov/index.aspx?page=3005>

Other types of customer-feedback may be more episodic and related to specific events. For example, during AMMA's administration of Los Angeles Metro's Seniors on the Move program, SOM trainees were routinely surveyed. Feedback received during the pre, post and post-post evaluation cycles helped to improve these training programs, as well as to provide information on training outcomes. Appendix C presents an SOM annual report that describes customer-reported outcomes and experience of these training sessions.

Training that is oriented to the program management is equally critical. AMMA has long experience in working with drivers, line staff that includes dispatchers and call-takers, and immediate supervisors who will be interacting with customers. This training must be focused on adopted policies and implementing procedures, to help ensure the best possible customer experience.

Coordination of Services

A final area of importance to the Strategic Planning process is that of Coordination. Coordination has been part of the public policy fabric since the early 1970's when Congress encouraged the sharing of resources around transportation services and programs. Of late, it has been cast as the responsibility of newly emerging Mobility Managers and Mobility Management Programs. In largely urbanized areas, such as Los Angeles County, coordination may be about not duplicating transportation services and getting more trips for dollars invested through judicious partnerships. It may also be about working with consumer groups to coordinate information and help them access services that are available and can meet their needs.

There are new opportunities around transportation coordination at present. This is in part because of new Federal funding support through the Job Access and Reverse Commute program and the New Freedom program. It is also due to increased policy attention to particular populations who use transit, including newly returning Veterans. AMMA Transit Planning has extensive credentials in relation to the potential of coordination and the practicalities of realizing that for public transit and non-profit agency



transportation programs. Where appropriate, AMMA can ensure that coordinated transportation planning is incorporated into a strategic planning process on behalf of County departments and operators.

Summary

In conclusion, AMMA Transit Planning brings both a strong skill set and a philosophy of planning that can enable Los Angeles County transportation programs -- in their many forms-- to conduct strategic planning of value and align program with the County's mission and values. The AMMA team stands ready and willing to develop a Work Plan in relation to a specific Request for Proposal the County may present. This can show with greater specificity than possible here just how the AMMA team would assist County transportation programs in developing Strategic Planning processes that are related to the County's mission, values, goals and strategies to craft appropriate plans for service improvement.

5. Fee Schedule

Below are the fully loaded hourly rates which would be billed to LA County monthly in arrears, in relation to agreed-upon projects. If projects were to be multi-year in duration, AMMA employee-based rates would increase by the CPI index for Los Angeles County.

AMMA Transit Planning

Fully-burdened hourly rates (includes benefits and G&A at 110%)

FY 2011/2012-

Heather Menninger, Project Director	\$135.00
Dennis, Program Administrator / Financial Analyst	\$ 82.58
Valerie Sedig, Community Outreach Specialist/Analyst	\$ 45.00

For these individuals, annual hourly rate increases at regional consumer price index levels are anticipated, unless otherwise negotiated with the County of Los Angeles.

AMMA hourly billing rates for associates who are not hourly employees are:

Roy Glauthier	\$130.00
Selena Barlow	\$135.00
Terri Litchfield	\$ 75.00
John Johnson	\$ 85.00
Ellen Blackman	\$ 85.00



6. Financial Statements

[REDACTED]

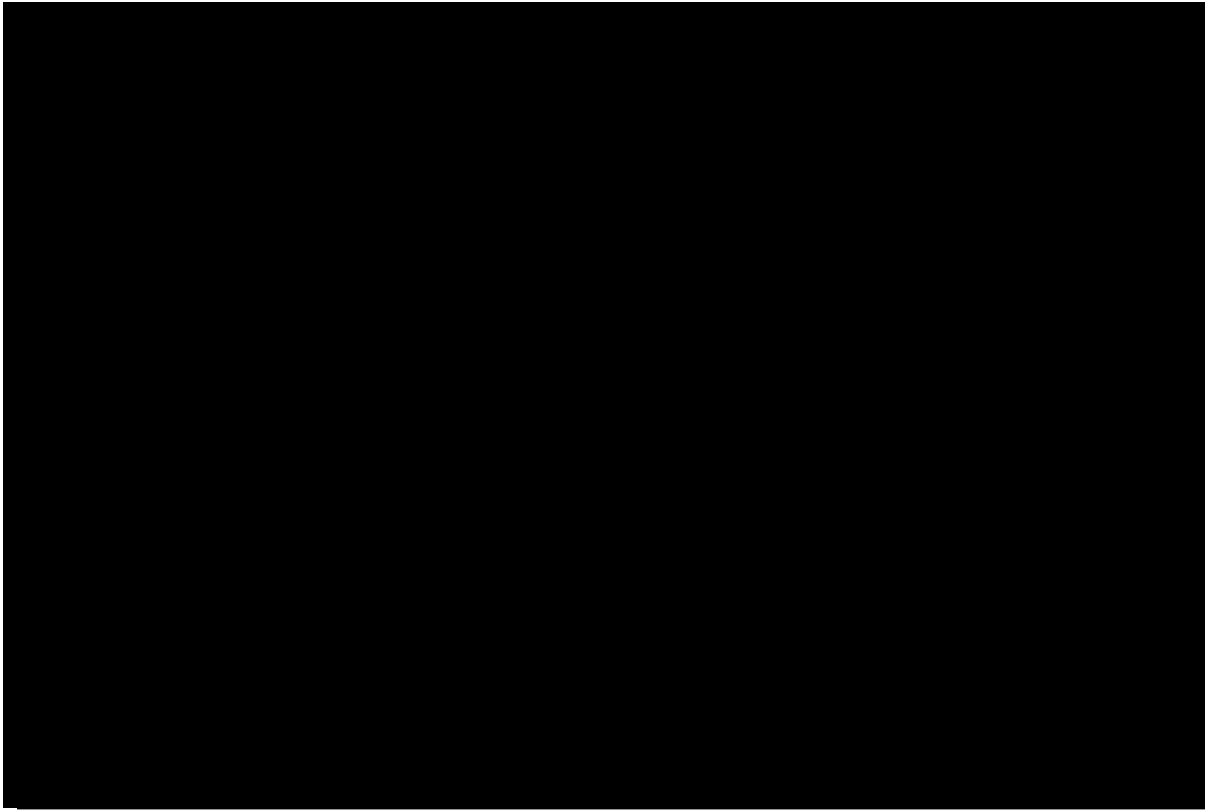
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**FINANCIAL STATEMENT INFORMATION
REMOVED BY LA COUNTY**

[REDACTED]





7. Additional Information

AMMA Team Member Resumes

Heather Menninger, Contract Manager

Roy Glauthier, Co-Project Manager, Transit Operations, Policies and Procedures
Specialist

Dennis Brooks, Financial Analyst / Program Manager

Valerie Sedig, Analyst / Community Outreach Specialist

Selena Barlow, Marketing and Coordination Specialist

Jon Johnson, GIS Mapping Associate

Ellen Blackman, Community Involvement Associate

Terri Litchfield, Database and Website Support Associate



HEATHER MENNINGER
PRINCIPAL, AMMA TRANSIT PLANNING

EXPERTISE

Ms. Menninger has more than 25 years' experience planning for improvement of community-based public transit and paratransit programs, particularly those serving disadvantaged populations, seniors, persons with disabilities and low income families. Working in rural, small urban and larger urbanized settings with projects largely in the Western United States, her areas of expertise include:

- Rural and Small Urban Mobility Needs Assessments and Transit Plan Development
- Americans with Disabilities Act Complementary Paratransit Operations
- Travel Training
- Senior/Non-Emergency Medical Transportation
- Public Transportation-Human Services Transportation Coordination Plans
- Paratransit and Specialized Transportation Performance Measurement and Comprehensive Operational Analyses

Additional details of Ms. Menninger's experience can be found at: www.ammatransitplanning.com

EDUCATION

California State Polytechnic University at Pomona, California

College of Environmental Science - Master's in Urban and Regional Planning, 2002

Brandeis University, Waltham, Massachusetts

Florence Heller School of Social Welfare - Master's Management of Human Services, 1981

Hampshire College, Amherst, Massachusetts

American Studies Major (Literature and Philosophy) - Bachelor of Arts, 1977

PROFESSIONAL EXPERIENCE

AMMA Transit Planning [A Menninger Mayeda Alternative] Riverside, CA (1987 - present)

Principal. Partnership, now sole-proprietorship, formed to bring professional evaluation and problem solving resources, skills and expertise to analysis and evaluation of human services, including public transit programs. Lead responsibilities, project management and project support in the following projects.

Rural and small urban transit innovation – Transportation Research Board's *Transit Cooperative Research Program* [A-21]. Team leader responsible for research in Western United States.

Performance assessment, management and comprehensive operations evaluation – Orange County Transportation Authority; Omnitrans; Cities of Montebello, Claremont, Santa Monica, Downey, Pasadena, Glendale, Whittier, Rancho Mirage, Barstow, Morongo Basin Transit.

Fixed-route transit and paratransit planning – Imperial County Transportation Commission; Trinity Transit; Western Placer County Consolidated Transportation Services Agency; Greensboro Transit Agency; OCTA *Go Local* Planning for: City of Mission Viejo, Dana Point-San Juan Capistrano-San Clemente, City of Irvine; Orange County Transportation Authority; Antelope Valley Transit Authority; Placer County Transportation Planning Agency; SCAG Southeast Gateway Cities, Los Angeles DOT/Los Angeles County MTA, Phoenix, AZ., Riverside Transit Agency, Riverside County Transportation Commission, Cities of Downey, Torrance, Huntington Beach, Pasadena, Santa Monica, La Canada Flintridge, La Crescenta.

Transit performance measures, monitoring, reporting and contracting -- San Bernardino Associated Governments; Riverside County Transportation Commission; Orange County Transportation Authority, Southern California Association of Governments, County of Los Angeles, cities of Downey, Glendale, Barstow.

Senior transportation/ non-emergency medical transportation planning studies – Lake County, San Bernardino/ Riverside Counties 5313 Non-Emergency Medical Study; County of Orange; San Diego County Aging Services; San Diego Association of Governments; City of Huntington Beach.



Heather Menninger, Continued, page two

Bus stop amenities study – Omnitrans; Mountain Area Regional Transit (MBTA).

Coordinated transportation plan development – San Luis Obispo County – SLOG: Butte County- BCAG; Los Angeles County-ASI; Ventura County Transportation Commission; North San Diego County; Maricopa County, AZ-Phoenix Valley Metro; County of San Bernardino; Riverside County Transportation Commission; San Bernardino Associated Governments; Riverside County's SunLine Transit, Los Angeles County Transportation Authority [INFOLINE].

Human service evaluation studies – Western Riverside County Measure A Specialized Transit Evaluation; Blindness Support Services/ The California Endowment; Los Angeles County Early Infant Intervention Program; San Bernardino County Home Delivered Meals Program.

Americans with Disabilities Act trip modeling, planning and service monitoring – City of Greensboro, North Carolina; University of Kansas, Lawrence, KS.; Orange County Transportation Authority, Omnitrans, Victor Valley Transit Authority, Mountains Area Regional Transit Authority, Cities of Downey, Barstow, Rancho Mirage; Ventura County's SCAT.

Staffing coordination councils -- San Bernardino County's Public and Specialized Transportation Advisory Council (1990 to present); City of Downey Citizens' Ad Hoc Transportation; others.

Frank D. Lanterman Regional Center, Los Angeles, CA ('83 – '87)

Transportation Project Director, Independent Contractor. Multi-regional center project to manage the client transportation services of eight L.A. region agencies, serving persons with developmental disabilities.

Planning & Evaluation Div., California Dept. of Developmental Services, Sacramento, CA (81-82)

Project Director. Caltrans planning grant to increase the cost effectiveness and efficiency of transportation purchased by the 21 Regional Centers serving persons with developmental disabilities across California.

Health Care Financing Administration, Federal Dept. of Health and Human Services, Region I, Boston, MA (9/80-7/81); Headquarters, Baltimore, MD. (1980)

Special Assistant to the Bureau Chief. Preparation of decertification packages to terminate two State Medicare/Medicaid institutions; certification analyses and application of statutory authority.

Massachusetts Department of Mental Health, Boston, MA ('79 – '80)

Management Consultant. Cost and program evaluation of the community residential care systems.

New England Rehabilitation Hospital, Woburn, MA ('77 – '80)

Program Coordinator. Grant to provide rehabilitation training to long-term care providers.

PUBLICATIONS AND PRESENTATIONS:

TRB – Related Papers, Guidebook and Presentations:

Transportation Research Board 90th Annual Meeting—Presentation-Session 534 “Quantifying and Meeting Door Assistance Transportation Needs in the ADA Paratransit Environment: Los Angeles County, California,” H. Menninger, V. Sedig. , January 25, 2011

Transportation Research Record # 2034 “Measuring Demand Management Impacts in a Sustainable Compliance Environment for the Americans with Disabilities Act”. H. Menninger-Mayeda, E. Rogers, D. Wiemiller, P. Sampson, G. Davis., National Research Council, Washington DC, 2007, pp. 123-133.

Transportation Research Record #1884 “ADA Demand Forecasting for Orange County Transportation Authority’s ACCESS Program” H. Menninger-Mayeda, P. Berger, D. Berger, B. McCormick, D. Boyle. Transportation Research Board, National Research Council, Washington DC, 2004, pp. 55-64.

Transit Cooperative Research Report 70: Guidebook for Change and Innovation at Rural and Small Urban Transit Systems. KFH Group and AMMA. Transportation Research Board, National Academy Press, Washington DC, 2001.

Transportation Research Record #231 - “The Sacramento Mobility Training Project: Early Results”, Starks, J., Simpson, C.; Menninger, H., pp. 630-638, May 1985.



Heather Menninger, Continued, page three

Other Presentations and Publications:

Presentation at CalAct, Spring Conference. Non-Emergency Medical Transportation Study Findings and Recommendations for Rural Lake County, Indian Wells, CA. April 20, 2011.

Evaluation of Six San Diego County Senior Transportation Programs: Transit Planning for the Graying of America, Master's Degree Thesis, Urban and Regional Planning Dept., Cal Poly Pomona, June 2002.

Presentation at the 14th *National Rural Public and Intercity Bus Transportation Conference*, "Status Report on TCRP A-21 – Innovation in Rural and Small Urban Transit", Lake Tahoe, CA. November 2002.

Presentation at the *Aging Summit – Senior Issues into the Next Century*: Sponsored by the County of San Diego, Aging and Independence Services. "Senior Mobility and Senior Transit Issues in San Diego County", San Diego, CA. February 2000.

Workshop Proceedings on Transportation and the Elderly: San Bernardino and Riverside Counties, Ontario, CA, February 14, 1995, 15 pages.

Presentation at the *American Association of Homes for the Aging*: "Transportation Services to the Rural Elderly," San Diego, CA, October 22, 1993.

Presentation at the *Transportation Research Board Conference*: "Transit Professionals and Consumers Jointly Developing Service Guidelines", Phoenix, AZ, May 1993.

"Transportation Implications of Supported Employment Programs", Menninger, H., Mayeda T. California Regional Centers Journal, 23 pages, July 1988.

PROFESSIONAL and VOLUNTARY AFFILIATIONS

American Planning Association (since '98).

California Association for Coordinated Transportation [CALACT] (since '91).

Community Transportation Association of America (since '95).

Transportation Research Board (since 2000).

Women's Transportation Seminar ('89-95, 2011).

California Transit Association (since 1994).

Los Angeles County Metropolitan Transportation Authority, Local Transit Systems Subcommittee ('94-'98).

Los Angeles County Transportation Commission, Paratransit Operations Subcommittee ('84-'93). *Other Voluntary Boards*: Foothill Philharmonic Committee/ Affiliate of the Los Angeles Philharmonic ('93-'05). Crippled Children's Society of Southern California, Board of Directors ('92-'98).



ROY E. GLAUTHIER
PRINCIPAL, TRANSPORTATION PLANNING & POLICY

Mr. Glauthier offers a unique combination of hands-on experience with local public transit management. In over 30 years of consulting and management of community transit and paratransit services, Glauthier has assisted transit agencies across the U.S. in the design and operation of regular and specialized transportation.

Since October 1996, as Principal of *Transportation Planning and Policy*, Mr. Glauthier has provided planning and policy assistance to government and transit agencies in the areas of general administration and management of community-level transit services and specialized services for individuals with disabilities. Projects and client agencies have included:

- Management and Operation Assessments: Pomona Valley Transportation Authority [La Verne CA], City of Fresno [CA], City of Rosemead [CA], City of La Mirada [CA], Orange County Transportation Authority [Orange County, CA], Palm Beach County [FL]; Regional Public Transportation Authority [Phoenix, AZ], Riverside County Transportation Commission [Riverside, CA], and City of Claremont [CA].
- Assessment and Planning for Senior Transportation Needs: County of Orange Health Care Agency [Santa Ana, CA], City of Huntington Beach [CA], County of San Diego, Aging and Independence Services Agency [San Diego, CA], San Diego Association of Governments [San Diego, CA];
- ADA Compliance, Policies and Procedures: Orange County Transportation Authority [CA], Washington Metropolitan Area Transit Authority [Washington, D.C.], Regional Transit Authority [New Orleans, LA], Long Beach Transit [Long Beach, CA];
- Human Service Transportation Coordination: Riverside County Transportation Commission [CA], Placer County Transportation Planning Agency [CA], Orange County Transportation Authority [CA];
- Transit & Paratransit Procurement Assistance: City of Rosemead [CA], City of Fresno [CA], City of Arcadia [CA], City of Colorado Springs [CO], City of Vallejo [CA], Orange County Transportation Authority [Orange County, CA];
- Assessment of Paratransit Scheduling Procedures: Pomona Valley Transportation Authority [La Verne, CA], City of La Mirada [CA], Kansas City Area Transit Authority [Kansas City, MO], Metropolitan Transportation Commission [Oakland, CA];
- Mobile Data Terminal/Automatic Vehicle Location Requirements and Specifications: King County Department of Transportation [Seattle, WA];
- Organizational Analysis and Restructuring: City of Colorado Springs [CO], City of Torrance, Transit Division [Torrance, CA];
- Interim Transportation Staffing: Orange County Transportation Authority, City of Arcadia [CA], City of Redondo Beach [CA], Orange County Office on Aging [CA].

For almost twenty years, from December 1976 through September 1996, Mr. Glauthier was a member of the corporate staff and Senior Management of DAVE Transportation Services, Inc. a national leader in contract management of public transit and paratransit services. During his tenure with the DAVE organization, Mr. Glauthier held a number of key positions with the company in the areas of consulting, administration and operations, and, from 1990 through August 1996, was one of five Principal Partners of the firm.

As Vice President of Management Services through 1994, Mr. Glauthier was responsible for DAVE's Consulting Division where he managed or served as senior consultant for the majority of DAVE's consulting engagements as well as providing technical assistance to DAVE-managed systems nationwide.



Roy Glauthier, Continued, page two

From mid-1994 through August 1996, Mr. Glauthier served as Regional Manager for DAVE's Northern Region, where he was responsible for 23 contracts and 18 operating locations in Northern California, Oregon, Washington State and Utah operating a total of 269 vehicles and transporting over 4 million annual passengers. As Regional Manager, Mr. Glauthier had responsibility for financial performance and operations, including direct client interface, contract compliance, hiring and training of new management staff and start-up of new projects. These systems ranged from a 6-bus fixed-route service in Petaluma, CA, to 26 paratransit vans operated for Tri-Met in Portland, OR, to 60 paratransit vans operated for King County, Seattle, WA.

Mr. Glauthier holds a Masters in Business Administration from the University of California, Irvine, and a Bachelor of Arts in Political Science from Claremont McKenna College, Claremont, CA.



DENNIS BROOKS

FINANCIAL ANALYST / PROGRAMS MANAGER, AMMA TRANSIT PLANNING

Mr. Brooks comes from a private sector background of sales and distribution where, among other responsibilities, he supervised and was responsible for the daily dispatching of drivers and coordination of their on-time delivery of product. His considerable financial and mathematical abilities are coupled with his own highly organized style, enabling him to provide strong analytic products that support project efforts. He is also responsible for the management of AMMA's multiple inventory databases as they relate to survey data collection, contacts management, and trip data analysis. Mr. Brooks has lead responsibility for the collection and analysis of transit system data and for reviewing system budgets to develop assumptions for projecting expenses and revenues.

Mr. Brooks' personable style and project management abilities enable him to work easily and effectively with others, even at geographic distances, helping to keep projects moving forward and on-schedule. He has been an employee of AMMA Transit Planning for over five years and has taken various community college-level courses and completed the University of the Pacific's Transit and Paratransit Management Certificate program and a CTAA – RTAP Cost Allocation Seminar.

RELEVANT TRANSIT PLANNING EXPERIENCE

- Recently completed the **Short Range Transit Plan for the Western Placer CTSA** on behalf of the **Placer County Transportation Planning Agency (PCTPA)**, which included a seven year operating and capital financial plan and incorporated estimated costs for new and innovative pilot project initiatives to be added to the CTSA's umbrella of services. The financial plan also included a revenue analysis that projected increases in LTF Article 4.5 allocations to fund new projects. The final financial plan was presented with detailed assumptions for projecting operating and capital costs, as well as assumptions for estimating revenue levels from partner agency match and from various state and local funding streams.
- Lead responsibility on updates to the Short Range Transit Plans for three rural regions of San Bernardino County on behalf of the **San Bernardino Associated Governments (SANBAG)**, the County Transportation Commission. For this effort Mr. Brooks evaluated both the fixed-route and paratransit services' costs and projected expenditures for the **Morongo Basin Transit Authority (MBTA)**, **Mountain Area Regional Transit Authority (MARTA)**, and the **City of Needles**. The resultant financial plan updates involved the collection of system performance data service characteristics, demographics analyses, and five year operating and capital financial plans that utilized a variable cost allocation model designed to track expenses by service mode.

ADDITIONAL RELEVANT EXPERIENCE

- Entering the third year of ongoing monthly invoice concurrence and performance monitoring for the **Riverside County Transportation Commission's (RCTC)** twenty-two JARC and New Freedom projects, including several mobility management projects, ensuring compliance with program regulations and with basic accounting practices of grant recipients for their specialized transportation projects.
- Assisted in the analysis of system performance data and rider survey results for the Comprehensive Operational Analysis of the **Greensboro Transit Authority's** Dial-A-Ride service. Responsibilities also included an in-depth examination of the agency's dispatch techniques and utilization of Trapeze dispatching and fleet management software.



VALERIE SEDIG

ANALYST/ COMMUNITY OUTREACH SPECIALIST, AMMA TRANSIT PLANNING

Valerie Sedig supports AMMA as a writer and public outreach coordinator/facilitator. Ms. Sedig brings experience in qualitative thinking and community involvement from a range of technical and service backgrounds, several involving working with the public. These taught her the rudimentary beginnings of cultural competency skills, the challenges of serving the public and an orientation to the value of procedure in ensuring work quality. In addition to development of written reports, Ms. Sedig supports AMMA through coordination activities, survey development and written analyses of outreach and survey work and recently earned a certificate from the National Transit Institute's course in *Public Involvement in Transportation Decision-making*. As a writer, she is responsible for AMMA's Quality Assurance for project deliverables. Ms. Sedig earned a Bachelor of Arts in World Literature from the University of California, Santa Cruz and earned College Honors, Honors in the Major and was inducted into the Phi Beta Kappa Honor Society.

RELEVANT PUBLIC OUTREACH AND INVOLVEMENT EXPERIENCE

- Ms. Sedig routinely participates in public outreach efforts for multiple AMMA projects. For the 2011 Update to the Public Transit-Human Service Transportation Coordination Plan for San Bernardino County, Ms. Sedig coordinated, assisted with presentations and discussion materials, and assisted in the facilitation of six public meetings held across San Bernardino County.
- Ms. Sedig assists in survey development, design and analysis, including telephone, mail and internet-based surveys, as part of the public involvement process for various projects. For San Bernardino Associated Governments (SANBAG) and Riverside County Transportation Commission (RCTC), Ms. Sedig assists with survey development, distribution and analysis as part of maintaining the County Transportation Commissions' Transportation Network Databases. For rural Lake County, the Lake City/County Area Planning Council, Ms. Sedig assisted with an extensive consumer survey mailed to nearly 37,000 homes and an internet-based agency survey for the Non-Emergency Medical Plan for Lake County. In Placer County, Ms. Sedig, conducted stakeholder interviews and assisted with rider survey efforts, contributing to development of the first Short Range Transit Plan for Western Placer Consolidated Transportation Services Agency.
- Other recent public involvement efforts include an Accessibility Survey for a Metrolink's extension on behalf of RCTC and extensive survey efforts for Greensboro Transit Agency as part of AMMA's Comprehensive Operational Analysis of the city's ADA complementary paratransit program and Los Angeles County Area Agency on Aging 's Door Assistance Needs Assessment.

TRANSIT TRAVEL TRAINING / MOBILITY MANAGEMENT EXPERIENCE

- For rural Trinity Transit, Ms. Sedig prepared several Travel Training Tools, several self-guided Trip Plans as well as PowerPoint presentations for riders and for gatekeepers.
- For the AARP (American Association of Retired Persons), Ms. Sedig is currently developing a Transportation Toolkit oriented to rural transportation issues. Six planned transportation fact sheets will educate policy makers and advocates about meeting the mobility needs of rural older persons.
- Ms. Sedig was responsible for various training, coordination and evaluation activities for Los Angeles Metro's Seniors on the Move Travel Training Program during AMMA's three year administration of 18 workshops across Los Angeles County.



SELENA BARLOW
OWNER, TRANSIT MARKETING, LLC.

EXPERTISE

Ms. Barlow has more than 25 years of experience marketing public transportation services. She works exclusively within the public transportation industry and has clients throughout the US. Additional details regarding her experience can be found at www.transitmarketing.com. Ms. Barlow's areas of expertise include:

- Market Research
- Community Involvement in Support of Transit Planning and Coordination Efforts
- Marketing Plan Development
- Branding and System Identity Development
- Design and Production of Passenger Information Materials
- Creation of Promotional and Collateral Materials
- Development of General and Targeted Ridership Campaigns

RELEVANT EXPERIENCE

Selena Barlow, Owner, Transit Marketing, LLC (1988-present)

Provides marketing and market research consultation and services exclusively to public transportation agencies. Has worked for more than a hundred transit systems since 1988. Services include marketing plan development, market research coordination and analysis, development of marketing programs and materials. Certified WBE.

Transit Marketing Instructor/Trainer, University of the Pacific, CA (1997- present)

Teaches a one day course in Transit Marketing for UOP's Transit/Paratransit Management Certificate Program.

Chief of Marketing, Metro-Dade Transit Agency, Miami, FL (1985-87)

Headed a comprehensive marketing division which included advertising, promotion, public affairs, community services and passenger information branches. Responsible for all marketing activities for a tri-modal transit system (rail, bus and people-mover). Key accomplishments included:

Director of Marketing, Sun Tran, Tucson, AZ (1982-85)

Responsible for all aspects of marketing for a 150 bus system, including advertising, promotion, market research, media relations, community outreach and customer service/information. Involved in short range planning, development and implementation of new services and major capital projects.

EDUCATION AND TRAINING

- Master of Business Administration, Concentration: Marketing, University of Arizona, May 1988
- Bachelor of Science, School of Journalism, Major: Advertising, University of Florida, June 1977

SAMPLE OF SERVICE DEVELOPMENT & COORDINATION PROJECTS

- MCAG, Merced, CA, Short Range Transit Plan, Plan for Consolidation of County and University transit services and Marketing Plan for Merced County Transit (in progress)
- Mendocino Transit Authority, CA, Short Range Transit Development Plan (including Mobility Management section) and Marketing Plan (in progress)
- Yosemite Area Regional Transportation System, CA, SRTP and Marketing Plan (2010-11)
- Butte County Transit, Chico CA, Market Based Transit Study including extensive research and outreach efforts (2009-10)



Selena Barlow, Continued, page two

- OCTA, Orange, CA, Orange County Coordinated Public Transit-Human Services Transportation Plan (with AMMA Transit Planning) (2008)
- San Bernardino Association of Governments, Human Services-Public Transportation Coordination Plan, including extensive community outreach and public workshops and e-survey of agencies (2007)

SAMPLE OF TRANSIT MARKETING PLAN PROJECTS

- Trinity Transit, CA, Transit Mobility Awareness Plan, Marketing Toolkit and Travel Training Program (with AMMA Transit Planning) (2011)
- Northern Arizona Intergovernmental Public Transportation Authority, Flagstaff, AZ, Complete marketing support for transit services in three communities (on-going)
- Arizona Department of Transportation Rural Transit Program, Marketing Support for 12 Rural Transit Agencies (on-going)
- Morongo Basin Transit Authority, Joshua Tree, CA, Intercity Transit Marketing Plan and Campaign (2009)
- Alaska Mobility Coalition, Statewide Transit Awareness Campaign (2009-10)
- Charlottesville Transit Service, Charlottesville, VA, 4-Year Strategic Marketing Plan (2009)
- Marin Transit, San Rafael, CA, Transit Marketing Plan (2007)
- LAVTA, Livermore, CA, Market Research and Marketing Plan (2008)
- Arizona Department of Transportation, Marketing recommendations and materials for 12 rural transit systems within the State of Arizona (2009, on-going)
- Eastern Sierra Transit Authority, Bishop, CA, SRTP and Transit Marketing Plan (2008)
- Missouri Department of Transportation, Statewide Rural Transit Marketing Campaign (2004 and 2007) *APTA Award Winning Campaign & Video*
- The Bus, Merced, CA, Transit Marketing Plan, Rebranding (2005)
- Durango Transit, Durango, CO, Transit Marketing Plan, Re-branding, Passenger Guide (2005)

SAMPLE OF TRANSIT MARKET RESEARCH PROJECTS (WITH CJI RESEARCH)

- DATA, Durham, NC, Passenger Survey (2011)
- COTA, Columbus OH, Passenger Survey (2010)
- Triangle Transit, Durham, NC, Passenger Survey (2009)
- Ann Arbor Transit Authority, Ann Arbor, MI, Passenger Survey (2009)
- Beeline, Westchester County, NY, On-board Survey of nearly 10,000 Beeline riders (2004 and 2007)
- Sacramento Regional Transit, Sacramento, CA, On-board Survey, Telephone Survey of Paratransit Customers, Ad Awareness Survey, Community Segmentation Survey (2006); Focus Groups (2007-2008)
- Intercity Transit, Olympia, WA, Customer Satisfaction Survey, Segmentation Study, Worksite E-mail Survey of Commuters (2005 and 2008)
- Ride On, Montgomery County, MD, On-board Passenger and Fare Surveys (2004-5)
- LTD, Eugene, OR, Passenger Surveys (1999, 2004 and 2008), E-Survey of UO Students (2007)
- LAVTA, Livermore, CA, Community Telephone Surveys, On-Board Passenger Surveys, Dial-a-Ride Survey, Focus Groups and Marketing Plan Development (2003 and 2007)



JOHN JAY JOHNSON
Principal, GIS Workshop, Encinitas, CA est. 1999

EXPERTISE

Cartography, Spatial Analysis, ArcGIS Certified Training

EDUCATION

Master of Business Administration, University of California, Irvine, 1987

Master of Urban & Regional Planning, University of Oregon, 1983

Bachelor of Arts, Geography, University of British Columbia, 1977

RECENT PROFESSIONAL EXPERIENCE

2012

- **Texas Region 10 Health Care Partnership mapping/analysis**, Cope Health Solutions, Los Angeles, CA
- **Los Angeles Medicare-Medical Dual Beneficiaries mapping/analysis**, Cope Health Solutions, Los Angeles, CA
- **San Diego Health Care Facilities mapping**, Cope Health Solutions, Los Angeles, CA
- **Ventura County Work Area Profile & Employment mapping**, AMMA, Riverside, CA
- **Consolidation of 12 DACUM Job Analyses into a ‘National Inventory of Geospatial Workforce Competencies,’** National GeoTech Center, Corpus Christi, TX

2011

- **Long Island Bus Service Route Reduction mapping**, Nassau County, NY, Veolia Transportation, NY
- **Placer County-Health Express, Trip Origin and Destination Patterns**, AMMA, Riverside, CA
- **Downey Southwest Route Alignment Alternatives**, AMMA, Riverside, CA
- **Adult Day Care Centers, San Diego County**, Cope Health Solutions, Los Angeles, CA
- **San Sedro Health Center Locations**, Cope Health Solutions, Los Angeles, CA
- **AltaMed Medical Facilities, Los Angeles, CA**, Cope Health Solutions, Los Angeles, CA
- **Regional ANC Partners, Southern California**, Cope Health Solutions, Los Angeles, CA
- **Community Health Centers & Physicians of Southeastern San Diego**, Cope Health Solutions, Los Angeles, CA
- **Dental Practices of Southeastern San Diego**, Cope Health Solutions, Los Angeles, CA
- **DSH Hospitals, California & Los Angeles County**, Cope Health Solutions, Los Angeles, CA
- **Clinic Development Sites, Chula Vista, CA**, Cope Health Solutions, Los Angeles, CA
- **Potential Community Partners – White Memorial Hospital, Los Angeles, CA**, Cope Health Solutions, Los Angeles, CA
- **Antelope Valley Transit System Routes & Minority & Low Income Resident Population**, Dan Boyle & Associates, San Diego CA.
- **Tri-City Trolley Routes**, Dan Boyle & Associates, San Diego CA.
- **Beach City Transit System Routes & Residential Transit Orientation Index**, Dan Boyle & Associates, San Diego CA.

2010

- **Dana Point Shuttle – Alternate Routes**, Dan Boyle & Associates, San Diego CA.
- **Calculate & map door to door & door thru door indicators of agency services, AAA Los Angeles Count**, AMMA, Riverside, CA
- **Quantify supply and demand for specialized transportation services and project future demand and its spatial distribution, ASI Los Angeles**, Judith Norman Transportation Consultant, Carson, CA.
- **White Memorial, Citrus Valley, Hollywood Presbyterian & St. Mary’s Medical Center Service Areas, Clinics & medical beneficiaries**, Cope Health Solutions, Los Angeles, CA
- **Individual fixed-route and system maps, loading & unloading of passengers by stop & route changes, Antelope Valley Transit Authority**, Dan Boyle & Associates, San Diego CA.



John Johnson, Continued, page two

2009

- **Calculate & map population estimates & route miles in urbanized area of Antelope Valley Transit Authority Service Area, Dan Boyle & Associates, San Diego CA.**
- **Calculate & map commuter travel patterns for Victor Valley & Lancaster/Palmdale residents, Antelope Valley Transit Authority, Dan Boyle & Associates, San Diego CA.**
- **Calculate and map passenger boardings & alightings, transit routes, commuter travel patterns & MTA routes for revised Beeline transit system, City of Glendale, Dan Boyle & Associates, San Diego CA.**
- **Map new routes, boardings by stop, and residential transit orientation index (RTOI) for revised system analysis, City of Monterey Park, Dan Boyle & Associates, San Diego CA**
- **Generate and map population projections by age, race & ethnicity for Victor Valley Study Area, City of San Bernardino, AMMA., Riverside, CA**

2008

- **Analyze and map Palmdale/Lancaster stops by city, Antelope Valley Transit Authority, Dan Boyle & Associates, San Diego CA**
- **Analyze, map & discuss population density, income, poverty level & disabilities by gender and age group, Butte County, AMMA, Riverside, CA**
- **Map Laguna Woods Extension/Laguna Hills Go Local routes, boardings & alightings by stop & regional connectors, City of Laguna Woods, Dan Boyle & Associates, San Diego CA**
- **Conduct spatial data analysis of 200,000 origin & destination locations including maps, tables, address geocoding & discussion, Care More Health Plan, Judith Norman Transportation Consultant, Carson, CA.**
- **Calculate and map residential transit orientation index for City, City of Irvine, Dan Boyle & Associates, San Diego CA**
- **Calculate ridership by area (Assembly, Congressional, Senate, City). Prepare maps for Dial-A-Taxi brochure. Prepare 36 “boardings by stop” maps, calculate alternate percent route lengths by City, City of Montebello, Dan Boyle & Associates, San Diego CA**
- **Conduct a quantitative analysis of fixed route, ACCESS & Senior Mobility boardings using “trip utilization ratios”. Create maps showing the trip utilization ratio for cities in Orange County for each of the 3 modes of transportation. Orange County Transportation Authority, AMMA, Riverside, CA**
- **Prepare Transit District Service Area brochure maps, PVTA, Dan Boyle & Associates, San Diego CA**
- **Analyze and map day care, work locations, routes and mileage for HOPE Bus Survey. Map county apportionment areas, Riverside County Transportation Commission, AMMA, Riverside, CA**
- **Map consumer destinations and program sites, San Diego Mental Health Facility, AMMA, Riverside, CA**
- **Geocode and map addresses for workshops, Seniors on the Move, AMMA, Riverside, CA**

2007

- **Update route maps & calculate bi-directional mileage, Antelope Valley Transit Authority, Dan Boyle & Associates, San Diego CA**
- **Conduct analysis and mapping for Coordination Inventory & Action Plan, ACCESS Services, Inc, L.A., Judith Norman Transportation Consultant, Carson, CA.**
- **Update route maps, City of Whittier: Dan Boyle & Associates, San Diego CA**
- **Prepare revised system and route maps, City of Lawrence, Kansas, Dan Boyle & Associates, San Diego CA**
- **Update route maps, City of Montebello: Dan Boyle & Associates, San Diego CA**
- **Conduct analysis, mapping and interpretation for S. Placer Dial-A-Ride Study, Placer County, AMMA, Riverside, CA**
- **Generate alternate route maps for proposed Tri-City Trolley, Dana Point, San Juan Capistrano, San Clemente, Dan Boyle & Associates, San Diego CA**



John Johnson, Continued, page three

- **Conduct analysis, mapping and interpretation for VCTC Human Service & Transit Service Coordination Study – Paratransit Ridership, Ventura County Transit Commission, Judith Norman Transportation Consultant, Carson, CA.**

RECENT PUBLICATIONS

- **National DACUM Job Analysis: Remote Sensing Specialist**, Inc. National Survey of Remote Sensing professionals, National GeoTech Center, Corpus Christi, TX, 2011.
- **What GIS Technicians Do: A Synthesis of DACUM Job Analyses**, Journal of the Urban and Regional Information Systems Association (URISA), Vol. 22, No. 2, 2010.
- **Curriculum Development for a Community College, Skills-Based GIS Certificate Program using DACUM/SCID and the UCGIS Body of Knowledge**, EdUC, 2008.



ELLEN BLACKMAN
AMMA COMMUNITY INVOLVEMENT ASSOCIATE

SUMMARY

Ellen Blackman has worked for more than 20 years to improve transportation for and use of transportation by older adults and persons with disabilities. This work included development of a transportation project using volunteer drivers to provide transportation for older adults, presentations on transportation options for seniors and people with disabilities, technical assistance on accessibility requirements, and participation with County Commission on Aging in development of transit orientation programs for older adults.

PROFESSIONAL EXPERIENCE : CONSULTANT

Ellen Blackman Consulting Services
CONSULTANT (2004-Present)

- Coordinated and led 18 Seniors on the Move programs, working with senior centers to schedule programs, preparing presentation outlines and handouts, and leading program discussions
- Provided technical advice to agencies serving persons with disabilities and older adults on submitting applications under Section 5310 program, and on the potential strengths and weaknesses of proposed applications
- Worked with eight agencies to prepare successful applications for funding for vehicles and related equipment for transportation of seniors and persons with disabilities
- Conducted research on the provision of transit information for riders with vision disabilities
- Prepared sections of public transit/human service transportation coordination reports

PROFESSIONAL EXPERIENCE

Center for Healthy Aging

PROJECT COORDINATOR (2005-2007) (part time)

- Developed new transportation program for older adults, through community outreach and project development
- Recruited, screened, and trained twelve volunteer drivers
- Organized public forums to provide information about the program and receive input on the needs and concerns of the community
- Developed fact sheets on different aspects of program
- Provided information to older adults, families of older adults, and program supporters

Los Angeles County Metropolitan Transportation Authority (MTA)

ACTING ADA COMPLIANCE ADMINISTRATOR (2007-2008) (As-Needed)

TRANSPORTATION PLANNING MANAGER III (2000-2004)

TRANSPORTATION PLANNER II (1993-2000)

- Participated with County Commission on Aging in the development of a transit orientation program for older adults
- Led evaluations of local applications for Section 5310 funding (capital grants for transportation of seniors and persons with disabilities)
- Provided technical assistance to MTA staff and staff of local public agencies on accessibility regulations
- Made presentations on accessible transportation and MTA policies to agencies and at workshops for people with disabilities
- Organized Accessibility Advisory Committee, ensuring representation from diverse disability and senior groups and facilitating communication between MTA and advocacy groups



Ellen Blackman, Continues, page three

ADDITIONAL PROFESSIONAL EXPERIENCE

- Participated on Los Angeles County Long Term Care Coordinating Council developing strategies for implementing Long Term Care Strategic Plan for Aged and Disabled Adults, and served as Co-Chair of Council's Transportation Work Group (2003-2006)
- Participated on Orange County Office on Aging review panel which evaluated proposals for Non Emergency Medical Transportation for seniors (2003)
- Participated on Metro Technical Advisory Committee, as Americans with Disabilities Act representative (2006-Present)



TERRI R. LITCHFIELD
AMMA DATABASE AND WEBSITE SUPPORT ASSOCIATE

EDUCATION

Ball State University, Muncie, Indiana

M.A. - Mathematical Statistics and Computer Science 1987

Anderson College, Anderson, Indiana

B.A. - Mathematics 1981

Honors - Kappa Mu Epsilon, President; Sigma Zeta, Member; National Dean's List

EMPLOYMENT HISTORY

AMMA, Claremont, CA (1990 to present, part-time)

Computer Software Design Consultant. Responsible for design of numerous relational databases to facilitate analysis of collected survey data on behalf of AMMA clients that include *County of San Diego*, *Santa Monica Municipal Bus Lines*, *Norwalk Transit System*, *City of Mission Viejo*, and *Riverside County Transportation Commission*, among others. Developed various special applications related to management of transportation-related information. Major projects include database design and maintenance for the publication of the San Bernardino County Specialized Transportation Inventory, now in its tenth year of publication; a Paratransit Information Service for the *Los Angeles County Transportation Commission* (now LACMTA) and development of various paratransit ADA rider registries for: *City of Whittier*, *City of Barstow*, *Victor Valley Transit Authority*, *City of Downey*.

Stratford Ecological Center, Delaware, OH (2002 to present, part-time)

Office Manager. Responsible for all aspects of office management including the design and maintenance of numerous internal and grant-related databases, payroll and bookkeeping.

City of Hope, National Medical Center, Duarte, CA (1987 to 1990)

Biostatistician/Database Consultant. Statistical consulting responsibilities on various research projects using SAS and BMDP software to analyze data; participated in the design, quality control and analysis of clinical trials within the Medical Center. Local area network administrator; participated in database design for departmental projects; liaison responsibilities between other hospital users and the outside computer consultant designers.

Anderson University, Anderson, IN (1984 - 1987, 1992-1994, part-time)

Mathematics Department Instructor. Taught algebra and finite mathematics courses. Taught algebra/geometry, trigonometry, calculus for Purdue Engineering Technology extension at Anderson.

ADDITIONAL DATABASE CONSULTING PROJECTS

Methodist Theological School in Ohio, Delaware, OH (2004, 2005)

Simply Living, Columbus, OH (2004, 2005)

Columbus Community Market Bookstore, Columbus, OH (2005, 2006)

Innovative Farmers of Ohio, Delaware, OH (2002, 2003)

TECHNICAL EXPERTISE

Microsoft Office Professional Applications: Access, Excel, Word, Publisher, PowerPoint

Website Design: FrontPage



8. Exceptions

A. Exceptions to the RFP (Parts A, B, and C only)

AMMA Transit Planning will comply with the requirements set forth in Parts A, B, and C of the RFP with the exception the insurance requirements stated in Part A, #3, page A-3:

“Proposer must have the ability to comply with all insurance provisions as set forth in Section 34, “Insurance Coverage Requirements,” of the Sample Contract in Part D of this RFP.”

AMMA maintains Professional Liability/Errors and Omissions Insurance at the \$500,000 coverage level and proposes this level is sufficient for the study-type projects anticipated by this RFP. Should a higher level of Errors and Omissions Insurance be required for subsequent work effort, AMMA would charge the increase in premium to the new project cost.

B. Exceptions to the Sample Contract (Part D only)

AMMA Transit Planning will comply with the requirements set forth in Part D, the Sample Contract, with the exception the insurance requirement stated in section 36.4, page 21:

“Professional Liability/Errors and Omissions Insurance covering CONTRACTOR’s liability arising from or related to this Contract, with limits of not less than \$1 million per claim and \$2 million aggregate. Further, CONTRACTOR understands and agrees it shall maintain such coverage for a period of not less than three (3) years following this Agreement’s expiration, termination or cancellation.”

AMMA maintains Professional Liability/Errors and Omissions Insurance at the \$500,000 coverage level and proposes this level is sufficient for the study-type projects anticipated by this RFP. Should a higher level of Errors and Omissions Insurance be required for subsequent work effort, AMMA would charge the increase in premium to the new project cost.



9. Certifications and Assurances

- Form A – Proposer’s/ Bidder’s Certification
- Form B – Firm/ Organization Information, Los Angeles County / Community Business Enterprise (LAC/CBE) Sanctions
- Form C – Certification of Lobbyist Requirements
- Form D – Child Support Compliance Program Certification
- Form E – Consultant Services Client Reference
- Form F – County of Los Angeles Contractor Employee Jury Service Program Application for Exception and Certification



FORM A

PROPOSER'S/BIDDER'S CERTIFICATION

THE UNDERSIGNED HEREBY CERTIFIES:

(a) That the only persons or parties interested in this bid as principals are the following:

Heather Menninger, Principal, AMMA Transit Planning

Note: If the Proposer/Bidder is a corporation, give the name of the corporation and the name of its president, secretary, treasurer, and manager. If a co-partnership, give the name under which the co-partnership does business and the names and addresses of all co-partners. If an individual, state the name under which the contract is to be drawn.

- (b) That this Proposal/Bid is made without collusion with any other person, firm or corporation. That the prices quoted herein have been arrived at independently without consultation, communication, or agreement with any other Proposer/Bidder or competitor for the purpose of restricting competition.
- (c) That the Proposer/Bidder has carefully examined the entire solicitation document, and makes this bid in accordance therewith.
- (d) That, if this Proposal/Bid is accepted, the Proposer/Bidder will enter into a written contract for the performance of the proposed work with the County of Los Angeles.
- (e) That the Proposer/Bidder proposes to enter into such contract and to accept in full payment for the work actually done thereunder the prices shown in this bid.

In accordance with Section 4.32.010 of the Los Angeles County Code, the undersigned hereby certifies and agrees that all persons employed by such firm, its affiliates, subsidiaries, or holding companies are and will be treated equally by the firm without regard to or because of race, religion, ancestry, national origin, or sex and in compliance with all anti-discrimination laws of the United States of America and the State of California.

BIDDER/PROPOSER CERTIFICATION

(Please circle)

- | | | |
|--|--------------------------------------|----|
| 1. The Proposer/Bidder has a written policy statement prohibiting discrimination in all phases of employment. | <input checked="" type="radio"/> Yes | No |
| 2. The Proposer/Bidder periodically conducts a self-analysis or utilization of its work force. | <input checked="" type="radio"/> Yes | No |
| 3. The Proposer/Bidder has a system for determining if its employment practices are discriminatory against protected groups. | <input checked="" type="radio"/> Yes | No |
| 4. Where problem areas are identified in employment practices, the Proposer/Bidder has a system for taking reasonable corrective action to include establishment of goals or timetables. | <input checked="" type="radio"/> Yes | No |

FIRM/CORPORATE NAME AMMA Transit Planning

Signed: _____

Name: Heather Menninger Title Principal

Address: 393 Two Trees Rd. Riverside, CA 92508

Employer ID No. 95-4205527



FORM B

LOS ANGELES COUNTY/COMMUNITY BUSINESS ENTERPRISE (LAC/CBE) SANCTIONS

1. A person or business shall not:
 - a. Knowingly and with the intent to defraud, fraudulently obtain, retain, attempt to obtain or retain, or aid another in fraudulently obtaining or retaining or attempting to obtain or retain, acceptance or certification as a minority or women business enterprise, or both, for the purposes of this article.
 - b. Willfully and knowingly make a false statement with the intent to defraud, whether by affidavit, report, or other representation, to a County official or employee for the purpose of influencing the acceptance or certification or denial of acceptance or certification of any entity as a minority or women business enterprise, or both.
 - c. Willfully and knowingly obstruct, impede, or attempt to obstruct or impede, any County official or employee who is investigating the qualifications of a business entity which has requested acceptance or certification as a minority or women business enterprise, or both.
 - d. Knowingly and with intent to defraud, fraudulently obtain, attempt or obtain, or aid another person or business in fraudulently obtaining or attempting to obtain, public moneys to which the person or business is not entitled under this article.
2. Any person or business that violates paragraph one (1) shall be suspended from bidding on, or participating as contractor, subcontractor, or supplier in, any county contract or project for a period of three years.
3. No County agency with the powers to award contracts shall enter into any contract with any person or business suspended for violating this section during the period of the person's or business' suspension. No awarding department shall award a contract to any contractor utilizing the services of any person or business as a subcontractor suspended for violating this section during the period of the person's or business suspension

I acknowledge that the undersigned, on behalf of himself or herself individually and on behalf of his or her business or organization, if any, is fully aware of the above policy of the County of Los Angeles and I declare under penalty of perjury that the foregoing Firm/Organization Information is true and correct.

FIRM NAME: AMMA Transit Planning

SIGNED: _____

TITLE: Principal

DATE: _____

KR/INFOFORM:REV. 2/95



FORM C

CERTIFICATION OF LOBBYIST REQUIREMENTS

(County Ordinance No. 96-0045)

Los Angeles County Lobbyist Ordinance No. 96-0045 became effective October 11, 1996 and requires each person who applies for a County contract, license, permit, grant or franchise to certify that he is familiar with the requirements of the Ordinance. All persons acting on behalf of the applicant must also certify that they have complied and will continue to comply with the requirements of this Ordinance through the application process.

Please submit this certification form with your application for a County contract, license, permit, grant or franchise.

I hereby certify that I am familiar with the requirements of Ordinance No. 96-0045. I further understand that the making of such a certification, and compliance with this Ordinance, is required before the granting of the requested contract, license, permit, grant or franchise.

Applicant's Signature _____

Applicant's Name Heather Menninger
(please print)

Date _____

PERMIT or LICENSE NUMBER(s) _____

The following applies to lobbyist, lobby firms, and lobbyist employers:

LOBBYIST NAME: _____

LOBBYIST ADDRESS: _____



FORM D

CHILD SUPPORT COMPLIANCE PROGRAM CERTIFICATION

Los Angeles County Code Chapter 2.200 establishes the Los Angeles County Child Support Compliance Program. This Program requires the County to provide certain information to the Child Support Services Department (CSSD) concerning its employees and business licensees. It further requires that bidders or proposers for County contracts submit certifications of Program compliance to the soliciting County department along with their bids or proposals. (In an emergency procurement, as determined by the soliciting County department, these certifications may be provided immediately following the procurement.)

IN ORDER TO COMPLY WITH THIS REQUIREMENT, COMPLETE THIS FORM AND SUBMIT IT DIRECTLY TO THE SOLICITING COUNTY DEPARTMENT ALONG WITH YOUR BID OR PROPOSAL. IN ADDITION, PROVIDE A COPY TO THE CHILD SUPPORT SERVICES DEPARTMENT AT THE ADDRESS OR FAX NUMBER SHOWN BELOW. SOLE PRACTITIONER MEMBERS OF AN ASSOCIATION MUST COMPLETE AND SUBMIT INDIVIDUAL FORMS.

I, (print name as shown in bid or proposal) Heather Menninger, hereby submit this certification to the (County department) Chief Executive Office, pursuant to the provisions of County Code Section 2.200.060, and hereby certify that (contractor or association name as shown in bid or proposal) AMMA Transit Planning, an independently-owned or franchiser-owned business (circle one), located at (contractor or, if an association, associated member address) 393 Two Trees Rd. Riverside, CA 92508

is in compliance with Los Angeles County's Child Support Compliance Program and has met the following requirements:

- 1) Submitted a completed Principal Owner Information Form to the Child Support Services Department;
- 2) Fully complied with employment and wage reporting requirements as required by the Federal Social Security Act (42 USC Section 653a) and/or California Unemployment Insurance Code Section 1088.5 and will continue to comply with such reporting requirements;
- 3) Fully complied with all lawfully served Wage and Earnings Withholding Orders or Notices of Wage and Earnings Assignment, pursuant to Code of Civil Procedure Section 706.031 and Family Code Section 5246(b) or pursuant to applicable provisions of the Uniform Interstate Family Support Act, and will continue to comply with such Orders or Notices.

I declare under penalty of perjury that the foregoing is true and correct.

Executed this _____ day of _____

at: Riverside, CA (Month and Year) (951) 784-1333
(City/State) (Telephone No.)

by: _____
(Signature of a principal owner, an officer, or manager responsible for submission of the bid or proposal to the County.)

Copy to: Child Support Services Department
Special Projects
P.O. Box 911009
Los Angeles, CA 90091-1009
FAX: (323) 869-0634 Telephone: (323) 832-7277 or (323) 832-7276



PRINCIPAL OWNER INFORMATION FORM

Los Angeles County Code Chapter 2.200 establishes the Los Angeles County Child Support Compliance Program. This Program requires the County to provide certain information to the Child Support Services Department (CSSD) concerning its employees and business licensees. It further requires that bidders or proposers for County contracts provide directly to the Child Support Services Department information concerning their "Principal Owners," that is, those natural persons who own an interest of 10 percent or more in the Contractor. For each "Principal Owner," the information which must be provided to the Child Support Services Department is: 1) the Principal Owner's name, 2) his or her title, and 3) whether or not the Contractor has made a payment of any sort to the Principal Owner.

IN ORDER TO COMPLY WITH THIS REQUIREMENT, COMPLETE THIS FORM AND SUBMIT IT DIRECTLY TO THE CHILD SUPPORT SERVICES DEPARTMENT AT THE ADDRESS OR FAX NUMBER SHOWN BELOW ON OR BEFORE THE DATE YOU SUBMIT A BID OR PROPOSAL TO A COUNTY DEPARTMENT. MAINTAIN DOCUMENTATION OF SUBMISSION. SOLE PRACTITIONER MEMBERS OF AN ASSOCIATION MUST COMPLETE AND SUBMIT INDIVIDUAL FORMS.

In addition, bidders or proposers must certify to the soliciting County department that they are in full compliance with the Program requirements by submitting the Child Support Compliance Program Certification along with the bid or proposal.

To: Child Support Services Department
Special Projects
P.O. Box 911009
Los Angeles, CA 90091-1009
FAX: (323) 869-0634

Telephone: (323) 832-7277 or (323) 832-7276

Contractor or Association Name as Shown on Bid or Proposal: AMMA Transit Planning

Contractor or Associated Member Name, if Contractor is an Association:

Contractor or Associated Member Address: 393 Two Trees Rd. Riverside, CA 92508

Telephone: (951) 784-1333 FAX: (951) 784-1212

County Department Receiving Bid or Proposal: Chief Executive Office, Master Agreements

Type of Goods or Services To Be Provided: Consulting Services

Contract or Purchase Order No. (if applicable): _____

Principal Owners: Please check appropriate box. If box I is checked, no further information is required. Please sign and date the form below.

- I. No natural person owns an interest of 10 percent or more in this Contractor.
- II. Required principal owner information is provided below. (Use a separate sheet if necessary.)

	Name of Principal Owner	Title	Payment Received From Contractor	
1.	<u>Heather Menninger</u>	<u>Principal</u>	[YES]	[NO]
2.	_____	_____	[YES]	[NO]
3.	_____	_____	[YES]	[NO]

I declare under penalty of perjury that the foregoing information is true and correct.


By: _____ Date: _____
(Signature of a principal owner, an officer, or manager responsible for submission of the bid or proposal to the County.)

(Print Name)
Heather Menninger

(Title/Position)
Principal



**CONSULTANT SERVICES
CLIENT REFERENCE FORM
(Submit at least three references)**

Proposer Firm: <i>AMMA Transit Planning</i>	
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ADDRESS <i>3175 West 6th Street Los Angeles, CA. 90020</i>	FAX
CONTACT PERSON <i>Alex McSweyn</i>	TITLE <i>Special Projects Manager</i>
PHONE NUMBER <i>(213) 738-2682</i>	
PERIOD OF SERVICE <i>July 2009- May 2010</i>	

Types of Services Provided: (indicate types of service proposer provided to the above reference, scope of project, and time frames given in which to complete work. References should clearly relate to the services Proposer would provide in response to this RFP.)

Countywide Door Assistance Transportation Needs Assessment


This countywide needs assessment involved considerable community outreach, through a series of agency interviews, consumer focus groups and a 3,000 agency mailing to assess the quantity and types of needs for door-to-door, door-through-door and portal-to-portal assistance required by seniors, persons with disabilities and persons of low-income. The project developed an understanding of need that the county AAA could address in the form of New Freedom and JARC [Job Access and Reverse Commute] grant applications. This included quantifying door-to-door and door-through-door need throughout Los Angeles County. The recommended operating plan described a "program of projects" approach, inviting projects of volunteer mileage reimbursement, taxi subsidy, escorts on paratransit and mobility management activities and detailing estimated project costs. Legal and liability issues as well as various management issues, particularly those associated with volunteer-based projects, were examined. The resultant New Freedom proposal to Los Angeles Metro was fully funded to establish five pilot door assistance projects and an AAA regional mobility manager. Project came in below budgeted amounts and on-time.

ADDITIONAL COMMENTS:

Key Staff: H. Menninger, D. Brooks, V. Sedig, E. Blackman



**CONSULTANT SERVICES
CLIENT REFERENCE FORM
(Submit at least three references)**

Proposer Firm: <i>AMMA Transit Planning</i>	
NAME OF COMPANY TO PROVIDE REFERENCE <i>Placer County Transportation Planning Agency (PCTPA)</i>	PHONE <i>(530) 823-4030</i>
ADDRESS <i>299 Nevada Street Auburn, CA 95603</i>	FAX <i>(530) 823-4036</i>
CONTACT PERSON <i>David Melko</i>	TITLE <i>Senior Transportation Planner</i>
PHONE NUMBER <i>(530) 823-4090</i>	
PERIOD OF SERVICE <i>2006-2008; 2010-October 2011</i>	

Types of Services Provided: (indicate types of service proposer provided to the above reference, scope of project, and time frames given in which to complete work. References should clearly relate to the services Proposer would provide in response to this RFP.)

**Short Range Transit Plan Development for WPCTSA
South Placer County Regional Dial-a-Ride Evaluation**

During 2006 through early in 2008, for this rural and small urban northern California County, AMMA conducted a regional evaluation of the five-paratransit programs, one deviated fixed-route service, and one human services provider in order to identify strategies for regional coordination or consolidation, and improved service effectiveness. Numerous data collection activities (surveying, interviewing, ride-alongs, trend analyses and GIS trip analyses) formed the basis for the recommendations subsequently developed. A ridership demand estimate for South County residents who might use dial-a-ride services was developed and, using alternative methodology, validated other PCTPA demand estimates. As a consequence of the study findings, the CTSA resigned its long-standing operation. PCTPA contracted with AMMA to provide subsequent technical assistance to transition to a new operating plan that included establishing a new joint powers authority with PCTPA as the new CTSA and a range of new programs and services. Among those were implementation of AMMA recommendations for coordinating selective functions of the individual dial-a-ride programs and countywide information.


AMMA also just completed, in October 2011, the first short range transit plan for this newly formed consolidated transportation services agency (CTSA), a joint powers authority responsible for provision of various coordinated services across western Placer County. Both traditional public transit and non-traditional services of this county are supported by the CTSA. Its coordinated service mix includes a non-emergency medical transportation component, volunteer door-to-door transportation, a taxi-based, trip-of-last-resort and a vehicle procurement program, among others. AMMA undertook various statistical and performance-based analyses and a series of public involvement activities to develop both operating direction and strategic direction for this program. Key among the recommendations is to continue development of various partnership arrangements that bring in non-transit funding to extend a slightly increased allocation of state Local Transportation (LTF) funding.

ADDITIONAL COMMENTS:

Key Staff: Heather Menninger, Dennis Brooks, Valerie Sedig



**CONSULTANT SERVICES
CLIENT REFERENCE FORM
(Submit at least three references)**

Proposer Firm: <i>AMMA Transit Planning</i>	
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ADDRESS <i>1963 E. Anaheim Street. Long Beach, CA 90801</i>	FAX
CONTACT PERSON <i>Shirley Hsiao</i>	TITLE <i>Service Development Manager</i>
PHONE NUMBER <i>(562) 599-8540</i>	 LONG BEACH TRANSIT
PERIOD OF SERVICE <i>2009</i>	

Types of Services Provided: (indicate types of service proposer provided to the above reference, scope of project, and time frames given in which to complete work. References should clearly relate to the services Proposer would provide in response to this RFP.)

Dial-A-Lift Paratransit Service Operational Analysis

AMMA Transit Planning conducted a comprehensive operational analysis of this 14-vehicle, dedicated taxi program for people with mobility impairments or those unable to use the Long Beach Transit fixed-route system. Long Beach Public Transportation Company’s Dial-a-Lift program is a curb-to-curb, shared-ride service providing 46,000 rider trips annually to 1,422 enrolled clients, as of FY 2009. Based in Long Beach, CA, with a current population of 400,060, this service is available to eligible clients who live and travel throughout Long Beach, Lakewood, and Signal Hill.

AMMA’s extensive quantitative assessment involved an in-depth analysis of trip utilization by time of day, as well as vehicle utilization and trip origin and destination patterns. We documented vehicle scheduling procedures; trip reservation, scheduling, dispatching, and reporting procedures; the program’s cost-reimbursement method; eligibility and certification process. A focus group with long-time drivers was conducted.


Operational recommendations provided strategic direction in seven areas including, revising operating policies, vehicle utilization practices, trip reimbursement procedures and better integration into the fixed-route transit system. These recommendations contributed to the agency’s rebidding of its Dial-a-Lift program.

ADDITIONAL COMMENTS:

AMMA Transit Planning, lead consultant, assisted by Total Contract Solutions, Inc., Charles Johnson



**CONSULTANT SERVICES
CLIENT REFERENCE FORM
(Submit at least three references)**

Proposer Firm: <i>AMMA Transit Planning</i>	
NAME OF COMPANY TO PROVIDE REFERENCE <i>County of San Diego, Behavioral Health Department</i>	PHONE
ADDRESS <i>3255 Camino del Rio South San Diego, CA 92108</i>	FAX <i>(619) 563-2760</i>
CONTACT PERSON <i>Piedad Garcia, EdD, LCSW</i>	TITLE <i>Director of System of Care</i>
PHONE NUMBER <i>(619) 563-2757</i>	
PERIOD OF SERVICE <i>2008-2009</i>	

Types of Services Provided: (indicate types of service proposer provided to the above reference, scope of project, and time frames given in which to complete work. References should clearly relate to the services Proposer would provide in response to this RFP.)

Transportation Needs Assessment – North County Pilot

The County of San Diego, Health and Human Services Agency, Behavioral Health Services was concerned about the mobility needs and concerns of its consumers. Individuals with behavioral health issues have unique problems in navigating public transit. These may include higher levels of anxiety about missing buses or getting lost and difficulties navigating a complex system. They share with the general public a strong desire for independent travel and the problems of car ownership on limited incomes. Field data collection involved site visits with 15 County behavioral health programs to document existing transportation services for approximately 2,700 enrolled consumers. Four consumer focus group discussions were held in two areas of the county with seniors and with non-senior adults to invite direct consumer input about existing transportation barriers.

New program initiatives were recommended, supported by considerable enthusiasm directly from consumers for mobility management/ information tools and volunteerism among and between consumers to increase transit ridership and mobility choices. Transit travel buddies, ridesharing opportunities and volunteer drivers with modest mileage reimbursement were among the consumer-oriented options identified.

Direction to the Agency prioritized strengthened communication with the public transit services system through improved information as critical, including with the countywide CTSA [consolidated transportation services agency], known as FACT and North County Transit District, the public transit operator. Other recommendations focused on consumer programs to use the abilities and knowledge transit-using clients in aiding other consumers. Four goal areas and eight programming strategies were detailed, including costs and discussion of implementation issues to provide guidance for Agency next-steps.

ADDITIONAL COMMENTS:


Key Staff: Heather Menninger, Dennis Brooks



CONSULTANT SERVICES
CLIENT REFERENCE FORM
(Submit at least three references)

Proposer Firm:

AMMA Transit Planning

NAME OF COMPANY TO PROVIDE REFERENCE <i>Riverside County Transportation Commission</i>	PHONE <i>(951) 787-7181</i>
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PHONE NUMBER <i>(951) 787-7905</i>	
PERIOD OF SERVICE <i>2007-Present</i>	

Types of Services Provided: (indicate types of service proposer provided to the above reference, scope of project, and time frames given in which to complete work. References should clearly relate to the services Proposer would provide in response to this RFP.)

Staff Support on Public Transportation Plans and Programs

AMMA Transit Planning has assisted staff in implementing its Specialized Transportation Program, an outgrowth of the 2008 Coordinated Public Transit-Human Services Transportation Plan which was developed by AMMA. That plan, which included extensive outreach, analysis of resources and gaps, the development of priority project areas and design of its first Universal Call for Projects of the Specialized Transportation Program. AMMA conducted the initial call (2007) by designing the solicitation and application forms, as well as subsequent reporting procedures. Following an over-subscribed response to the Call, with proposals for almost two times the \$8 million available, awards were made to 22 community-based and public transit-led projects across the County.

On-going staff support has involved preparing three-party agreements, developing and refining reporting forms and procedures, problem solving around key implementation issues and providing sufficient technical assistance to ensure that these small, community-based programs to comply with the Federal program requirements. Critical compliance issues AMMA team members addressed included defining drug and alcohol testing requirements for vehicle operators, ensuring that appropriate driver licensing by the DMV and vehicle terminal inspections by the California Highway Patrol were in place. AMMA continues to oversee the ongoing concurrence activities of the Universal Call program, now anticipating its third Call for Projects.

As part of the current 2012 Update to the Coordinated Public Transit Human Services Transportation Plan for Riverside County, AMMA undertook an extensive outreach process that included public workshop and community meetings. One evening workshop was held in the North Shore area of the Salton Sea, a transportation disadvantaged community, comprised largely of agricultural workers, to better understand the community's transportation needs. This Update process also included prioritizing new and continuing goals and strengthening project evaluation criteria based on the findings from the community outreach process.

ADDITIONAL COMMENTS:

Key Staff: Heather Menninger, Roy Glauthier, Dennis Brooks, Valerie Sedig



FORM F

COUNTY OF LOS ANGELES CONTRACTOR EMPLOYEE JURY SERVICE PROGRAM
APPLICATION FOR EXCEPTION AND CERTIFICATION FORM

The County's solicitation for this contract/purchase order (Request for Proposal or Invitation for Bid) is subject to the County of Los Angeles Contractor Employee Jury Service Program (Program) (Los Angeles County Code, Chapter 2.203). All bidders or proposers, whether a contractor or subcontractor, must complete this form to either 1) request an exception from the Program requirements or 2) certify compliance. Upon review of the submitted form, the County department will determine, in its sole discretion, whether the bidder or proposer is excepted from the Program.

Company Name: AMMA Transit Planning		
Company Address: 393 Two Trees Rd		
City: Riverside	State: CA	Zip Code: 92508
Telephone Number: (951) 784-1333		
Solicitation For (Type of Goods or Services): Strategic Planning Master Agreement		

If you believe the Jury Service Program does not apply to your business, check the appropriate box in Part I (attach documentation to support your claim); or, complete Part II to certify compliance with the Program. Whether you complete Part I or Part II, please sign and date this form below.

Part I: Jury Service Program Is Not Applicable to My Business

- My business does not meet the definition of "contractor," as defined in the Program as it has not received an aggregate sum of \$50,000 or more in any 12-month period under one or more County contracts or subcontracts (this exception is not available if the contract/purchase order itself will exceed \$50,000). I understand that the exception will be lost and I must comply with the Program if my revenues from the County exceed an aggregate sum of \$50,000 in any 12-month period.
- My business is a small business as defined in the Program. It 1) has ten or fewer employees; and, 2) has annual gross revenues in the preceding twelve months which, if added to the annual amount of this contract, are \$500,000 or less; and, 3) is not an affiliate or subsidiary of a business dominant in its field of operation, as defined below. I understand that the exemption will be lost and I must comply with the Program if the number of employees in my business and my gross annual revenues exceed the above limits.

"Dominant in its field of operation" means having more than ten employees, including full-time and part-time employees, and annual gross revenues in the preceding twelve months, which, if added to the annual amount of the contract awarded, exceed \$500,000.

"Affiliate or subsidiary of a business dominant in its field of operation" means a business which is at least 20 percent owned by a business dominant in its field of operation, or by partners, officers, directors, majority stockholders, or their equivalent, of a business dominant in that field of operation.

- My business is subject to a Collective Bargaining Agreement (attach agreement) that expressly provides that it supersedes all provisions of the Program.

OR

Part II: Certification of Compliance

- My business has and adheres to a written policy that provides, on an annual basis, no less than five days of regular pay for actual jury service for full-time employees of the business who are also California residents, or my company will have and adhere to such a policy prior to award of the contract.

I declare under penalty of perjury under the laws of the State of California that the information stated above is true and correct.

Print Name: Heather Menninger	Title: Principal
Signature:	Date:



2012 Update to the Public Transit – Human Services Transportation Coordination Plan for Riverside County

Prepared for:



**Robert Yates, Multi Modal Services Director
Riverside County Transportation Commission**

Prepared by:



Final May 16, 2012

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2012 Update to the Public Transit – Human Services Transportation Coordination Plan for Riverside County

Executive Summary

Plan Update Requirement

This document brings current the *2008 Public Transit-Human Services Transportation Coordination Plan for Riverside County*. Required for update every four years, this augments but doesn't replace the extensive work done for Riverside County's first coordinated plan. These Coordinated Plans are intended to promote mobility by identifying needs and transportation service gaps of three targeted populations:

- older persons
- persons with disabilities, and
- persons of limited means.

The Coordinated Plan does not provide for funding, but helps to guide funding decisions, specifically those related to FTA 5316-*Job Access and Reverse Commute (JARC)*, 5317-*New Freedom* program and the 5310 *Capital Program for Seniors and Persons with Disabilities*. Projects funded from these programs must be “derived from a locally developed, coordinated public transit-human services transportation plan.” This plan can also help support and provide rationale for additional funding requests, both by public transit providers and by its human services partners.

Population and Demographic Changes

Exhibit ES-1, Percent Change in Population by California Counties

Most notably, Riverside County has grown by almost 40% in the past decade, adding another 600,000 new residents. The 2010 Census identified Riverside County as among the two fastest growing counties in the State of California, growing from 1.5 million persons to 2.1 million residents.

Within this growth, there have been important changes among the target group populations:

- **Low-income adults**, ages 18 to 64, are a fast growing sub-group, increasing by 46% over the past decade and adding 52,000 individuals.
- **Adults with disabilities**, ages 18 to 64, represent 8.5 percent of the adult population or 110,000 persons.
- **Older adults**, ages 65 and up, are now 11.7 percent of the County's total population, or 253,000 persons.



- **Oldest adults**, ages 85 and older are the fastest growing sub-group, increasing to 1.4% of the County’s total population, over 30,000 individuals.

Analysis of work area profiles from 2010 Census information reported Riverside County had a total of 564,071 jobs, with the heaviest concentration of these, not surprisingly, in the urbanized areas and along the County’s major travel corridors. The distribution of jobs by industry shows the largest proportion of these jobs were in **Retail (13.2%)**, followed by **Educational Services (12.4%)** and by **Health Care and Social Assistance (12.3%)**.

Actions Since 2008 Coordinated Plan

The 2008 Plan called out four goals by which to improve the mobility of the three target groups, along with eighteen objectives and dozens of possible implementing strategies. This Update reports on a wide range to activities – spearheaded by RCTC and its many partners – and undertaken during these past four years, responsive to the 2008 Coordinated Plan direction. Among many, two important initiatives include:

- **RCTC’s Specialized Transportation Program** – Growing by over 300% and now providing 2% of all public transportation trips, this mix of Federal and local funding provided for 257,000 trips in FY 10-11 through community shuttles, mileage reimbursement, bus pass and rideshare projects, and special fixed-route services. Travel training and mobility management projects were also supported.
- **IE 511 Program** – Initiated on February 1, 2011 this telephone and web-based information capability provides real-time information for Riverside and San Bernardino Counties, with 302,498 unique web visits and 838,657 total phone calls in its first 15 months of operation.

Exhibit ES-2, Riverside County Comparison of Trips Provided

Public Transit and Other Specialized Transportation Trips Provided	2008 Coordinated Plan		2012 Plan Update		% Increase
	FY 05-06		FY 10-11		
Service by Mode	Trips	%of Total Trips	Trips	%of Total Trips	
Rail [1]	2,700,117	19%	2,909,872	18%	8%
RCTC Commuter Rail - Riverside	1,101,646		1,304,219		
RCTC Commuter Rail - Inland Empire Orange County	1,066,541		1,025,883		
RCTC Commuter Rail - 91	531,930		579,770		
Public Bus, Fixed Route [1]	10,575,445	76%	12,264,950	76%	16%
RTA FR	5,718,234		6,299,800		
SunLine FR	3,474,361		4,045,018		
RTA Contract FR	916,366		1,462,330		
Banning FR	183,265		120,018		
Corona FR	146,983		152,568		
Beaumont FR	89,962		148,099		
Palo Verde Valley FR	46,274		37,117		
Public Demand Responsive [1]	548,845	4%	687,065	4%	25%
RTA DAR	199,322		322,611		
Riverside Special Transportation Services DAR	145,223		161,242		
Sunline DAR	83,956		110,462		
Corona DAR	58,892		58,153		
Beaumont DAR	28,656		18,892		
RTA Taxi	18,536		7,479		
Banning DAR	9,463		8,226		
Palo Verde Valley DAR	4,797		0		
Specialized Transportation Program [2]	61,859	0.4%	257,210	2%	316%
			Universal Call Projects		
ALL TRIPS: Including Rail, Public Transit, Measure A, JARC and New Freedom	13,886,266	100%	16,119,097	100%	16%
Trips per Capita for 2006 Total Population (2,005,477 persons) [3]	6.9		7.2		5%
Trips per Capita for 2011 Total Population (2,226,552 persons) [3]					

Notes:
 [1] RCTC Transtrack SRTP Service Summary - FY 05/06 Audited, FY 10/11
 [2] Specialized Transportation trips subsidized by The Volunteer Center are already reported in RTA fixed route trip data.
 [3] State of California, Department of Finance, July 2007, and July 2011

Across

Modes Over Four Years

This Update documents the overall volume of public transportation trips provided in Riverside County, compared to four years ago. The countywide total increased from almost 13.9 million trips to 16.1 million trips, a 16% increase. This is notable given that while population increased, the public transit funding base declined during this same period. It is, therefore, impressive that during this same period, **trips per capita increased 5%**, from 6.9 to 7.2 trips per capita for all modes across the county.

Current Mobility Needs

This Update involved five community workshops across the county, several stakeholders meetings and an invitation for comments from RCTC’s Transportation Stakeholders Database, with 661 organizational entries. Discussions identified needs by sub-areas of the County, by trip-type and within the target populations.

Despite the growing public transit ridership that this 2012 Update documents, there are continuing and some new unmet transportation needs and service gaps for the target populations. Numerous sub-groups were identified, some with unique trip needs and including several new groups:

- **homeless veterans** seeking employment
- **newly returning veterans** from the Iraq and Afghanistan theatres and their families
- **agricultural workers** traveling from isolated areas to social services and grocery stores
- **low-income workers** living in outlying rural areas, traveling to retail and hospitality employment
- **individuals without cars** traveling to regional destinations
- **unemployed parents** traveling to job interviews but also with day care needs
- **students** traveling to community college and high schools without funds for fuel
- **older adults** decreasing driving and exploring new mobility choices
- **persons with disabilities** living just beyond transit’s ¾ mile ADA boundaries
- **families seeking reunification with children** placed outside of the home.

Exhibit ES-3, Compiled Unmet Transportation Needs

1. Expanded transit service operating hours and frequencies .	Maintaining and Building Capacity to Meet Individualized Needs
2. Increasing transit’s speed so that trips to regional destinations (work, medical) are not so long.	
3. Addressing unserved geographic pockets , including areas where transit services were reduced.	
4. Improved interconnectivity .	
5. Services targeted to specialized needs : non-emergency medical transportation and other specialized shuttles and services.	
6. Improved connections between services: rail and transit; between jurisdictions.	
7. Building capacity of human service providers to address specialized populations’ trips through non-traditional modes.	
1. Maintaining and expanding existing transit information tools .	Promoting Transportation Access and Information Portals
2. Addressing safety and security concerns, through bus stop amenities, lighting and paths of access.	
3. Travel training to individuals and agency stakeholders to learn about and to use available public transit.	
4. Expanding information tools supporting specialized populations’ travel, including veterans, older adults decreasing driving and non-English speaking residents and other targeted sub-groups.	
5. Supporting vehicle equipment that ensures lift-equipped vehicle availability that is safe and reliable.	
6. Supporting technology innovations promoting service reliability, safety and cost-effectiveness.	

Establishing 2012 Coordinated Plan Priorities

This 2012 Coordinated Plan Update process identified a multiplicity of needs, consolidated into the previously presented, Exhibit E-3 and grouped in two areas: 1) **Maintaining and Building Capacity**, trip-related activities, and in 2) **Promoting Transportation Access and Information Portals**, various infrastructure-related activities. These two areas point to important priorities for this 2012 Update.

The Coordinated Plan is required by regulation to establish priorities that can guide future funding decisions. Exhibit ES-4 presents the three recommended priority areas with possible implementing objectives to provide Riverside County with direction for improving mobility of the three target populations. To the two priority areas developed through this Update process, a third is added, 3) **Coordination Leadership**, brought forward from the 2008 Coordinated Plan process. This third goal, and its three related objectives, provides for continuing leadership important to moving the other two goals ahead.

Exhibit ES-4, 2012 Coordinated Plan Update

Prioritized Transportation Goals and Objectives
<p>GOAL 1: MAINTAINING AND BUILDING CAPACITY TO MEET INDIVIDUALIZED NEEDS</p> <ul style="list-style-type: none"> 1.1 Expanded fixed-route services 1.2 Improved interconnectivity 1.3 Purpose-specific regional services 1.4 Expanded capacity of targeted human service transportation
<p>GOAL 2: PROMOTING TRANSPORTATION ACCESS AND INFORMATION PORTALS</p> <ul style="list-style-type: none"> 2.1 Expanded transit information portals 2.2 Promoting travel training 2.3 Targeted mobility management initiatives 2.4. Capital projects supporting transit accessibility or safety for use by the target populations 2.5 Capital projects for innovative technology to improve reliability or cost-effectiveness of services to the target populations
<p>GOAL 3: COORDINATION LEADERSHIP</p> <ul style="list-style-type: none"> 3.1 Continuing to promote coordination between public transit & human services organizations 3.2 Continuing Specialized Transportation Call for Project administration 3.3 Reporting on outcomes and successes for transit funding invested

RCTC anticipates a future Call for Projects for its Specialized Transportation Program, late in 2012, involving JARC, New Freedom and Measure A funds. This Coordinated Plan Update provides direction to those interested, willing and able partners who may be applying for funds available under the Call. These priority areas of Exhibit ES-4 suggest the types of project objectives that will be in line with Riverside County priorities. Prospective applicant agencies will want to carefully review Chapter V of this Coordinated Plan to help build projects and grant requests that are more likely to secure the always too-limited funding.

2012 Update to the Public Transit – Human Services Transportation Coordination Plan for Riverside County

Table of Contents

EXECUTIVE SUMMARY	III
I. WHAT IS THE PURPOSE OF THE UPDATE?	1
Federal Statute and Requirement	1
Riverside County’s 2008 Coordinated Plan	1
Update's Approach	2
II. WHAT POPULATIONS DOES THIS UPDATE CONSIDER?	3
Riverside County Population Changes	3
Riverside County Work Area Profiles	6
III. IMPLEMENTATION ACTIONS SINCE THE 2008 COORDINATED PLAN?	10
Actions Taken on 2008 Coordinated Plan Goals and Objectives	10
RCTC’s Specialized Transportation Program – Services, Trips Provided and Lessons Learned	15
Existing Public Transportation Resources	18
IV. WHAT NEEDS ARE REPORTED NOW?	19
Community Outreach Approach	19
What Did We Learn – What Needs Were Reported?	21
V. WHAT PRIORITIES WILL ADDRESS IDENTIFIED TRANSPORTATION GAPS?	28
Themes in Unmet Transportation Needs and Service Gaps	28
Establishing 2012 Coordinated Plan Priorities	30
Implementing 2012 Priorities	33
APPENDICES	35
Appendix A: 2010 Census, Riverside County Work Area Profile Report	36
Appendix B: RCTC’s Specialized Transportation Program FY 09/10 Trips and Cost Detail by Project	38
Appendix C: Workshop Announcement Invitation and Spanish-Language Flyer	39
Appendix D: Summary of Comments Received by RCTC Via Email	41
Appendix E: Riverside County Transportation Stakeholder Database Agencies, 2011	45

LIST OF EXHIBITS

Exhibit ES-1: Percent Change in Population by California Counties	
Exhibit ES-2: Riverside County Comparison of Trips Provided Across Modes Over Four Years	
Exhibit ES-3: Compiled Unmet Transportation Needs	
Exhibit ES-4: 2012 Coordinated Plan Update- Prioritized Goals and Objectives	
Exhibit 1: Percent Change of Population in California’s Counties	3
Exhibit 2: Target Populations for JARC, New Freedom, and Section 5310	4
Exhibit 3: Riverside County Target Populations, Proportions of Total Population and Percent Change	5
Exhibit 4: 2010 Riverside County Jobs by Industry Sector, US Census	7
Exhibit 5A: West Riverside County Employment Estimates Map	8
Exhibit 5B: East Riverside County Employment Estimates Map	9
Exhibit 6: Actions Taken Addressing 2008 Coordinated Transportation Plan	11
Exhibit 7: RCTC Specialized Transportation Program, Trips by Project Type	15
Exhibit 8: 2010 RCTC Subsidy per Trip by Project Type	15
Exhibit 9: Specialized Transportation Program Project Types and Trips Provided	16
Exhibit 10: Public Transit and Other Specialized Transportation Trips Provided	18
Exhibit 11: Compiled Unmet Transit Needs	30
Exhibit 12: Recommended 2012 Coordinated Plan Update Priority Areas	31

CHAPTER FOUR – DIAL-A-RIDE AND SPECIALIZED TRANSIT SERVICES IN PLACER COUNTY

4.1 OVERVIEW

This chapter establishes the public paratransit resources available to South Placer County residents in relation to a number of areas. Specifically discussed are operating characteristics in relation to operating authority, an analysis of available performance data, comment on facilities and equipment, operating hours and fares. Included also are qualitative comments from a series of ride-alongs with each service.

4.2 DIAL-A-RIDE AND SPECIALIZED TRANSIT SERVICES AVAILABLE IN THE COUNTY

The dial-a-ride service areas in South Placer County are shown on Figure 4-1. General public dial-a-ride service information comes from the cities of Roseville, Lincoln, Auburn and the County of Placer. Specialized transit information was obtained from PRIDE Industries, both for the services operated as the Consolidated Transportation Services Agency (CTSA) and on behalf of the County of Placer for its contracted services.

The dial-a-ride service area boundaries follow the city limits of Lincoln, Roseville and Auburn. For the County they are more generalized and include portions of Auburn, Rocklin, Loomis and Granite Bay. The area served by Auburn's Deviated Fixed Route is also shown because it extends beyond the City's NE boundary and carries passengers who might otherwise use the Auburn or CTSA Dial-A-Ride service. Finally, the location of the Auburn Transfer Center along with two transfer stations at the Galleria Shopping Center in Roseville, are also noted.

4.3 SOUTH PLACER COUNTY PUBLIC DIAL-A-RIDE OPERATING CHARACTERISTICS

Figure 4-1 presents the service areas and Table 4-1 the central characteristics of eight dial-a-ride services operating in South Placer County. Each program is detailed in terms of its operator, the area served, hours and days of service, eligibility, policies related to fare, trip reservations and wait time, and cancellation and no show policies. Of the eight programs presented, seven serve the general public. One, the Pride CTSA, serves only seniors and persons with disabilities. All are traditional dial-a-ride, demand response programs with the exception of the City of Auburn deviated fixed-route service which picks up or drops off riders within $\frac{3}{4}$ of a mile of the published route.

Fares vary considerably. For seniors and persons with disabilities, fares are 50 cents on the Placer County Dial-A-Rides, 60 cents on Auburn Transit and \$2 on Lincoln and Roseville Dial-A-Rides. Pride/CTSA has no published fare. Each of the services operates six days a week, Monday through Saturday, with the exception of Lincoln Dial-A-Ride and Granite Bay Dial-A-Ride for which there is no Saturday service. Hours of operation vary considerably, as do trip reservation and cancellation policies.

Figure 4-1

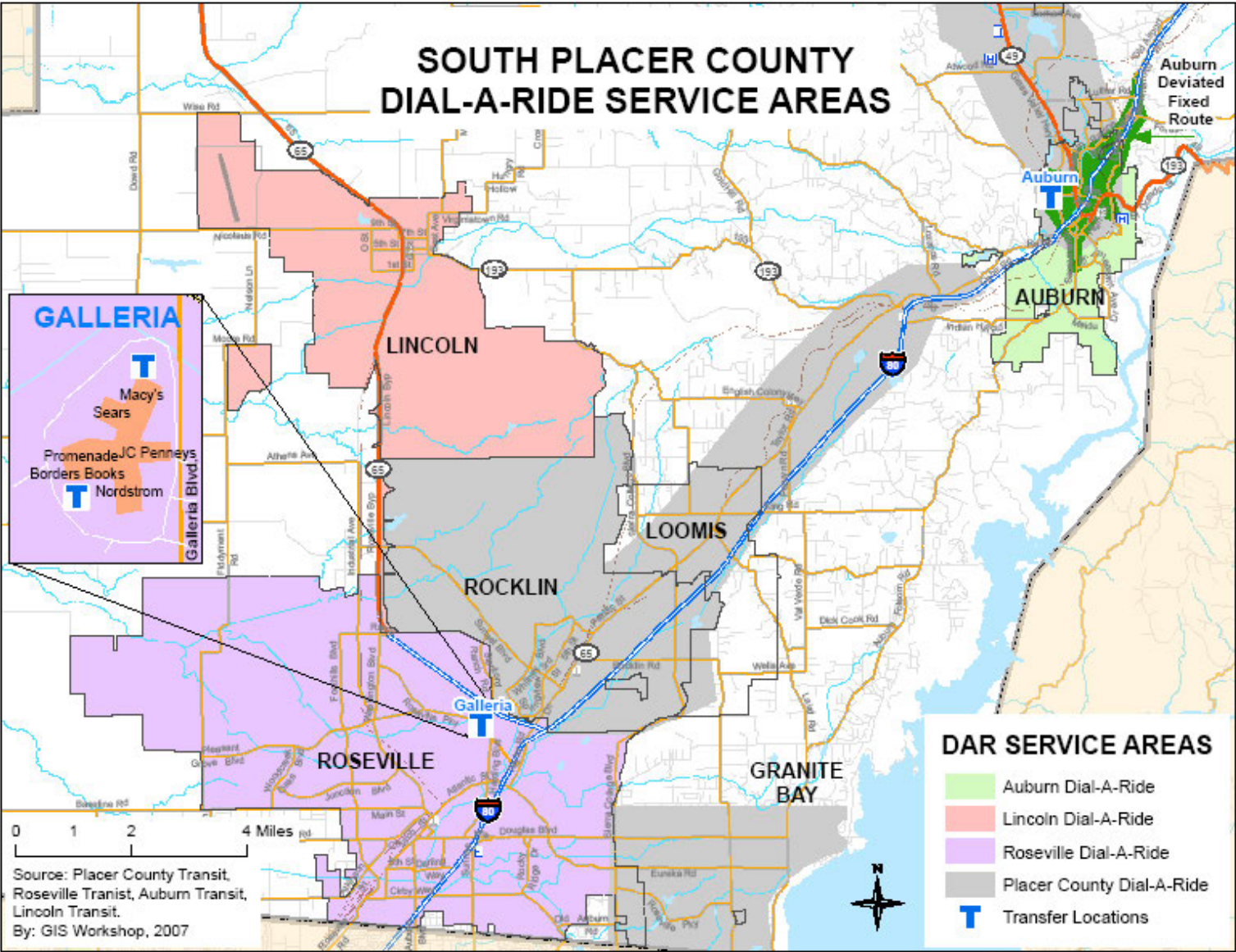


Table 4-1, South Placer County Dial-A-Ride Study -- Summary of System Operating Characteristics

System	Operating Organization	Area Served	Hours/Days of Service	Eligibility	Fare Policies	Trip Policies	Reservation Policies	Cancellation/ No-Show Policies
PLACER COUNTY TRANSIT (PCT)								
Rocklin/Loomis Dial-A-Ride	Contracted to PRIDE Industries	Rocklin and Loomis unincorporated areas; transfers at the Galleria and Sierra College.	M-F 6 a.m. to 7:55 p.m. Rocklin HS 6:45 & 7:45 a.m. & 3 p.m. Sat. 9 a.m. to 3:55 p.m.	General Public	-General Public \$2 -Disabled/ Senior/ Youth - \$0.50 -GP Day Pass \$2.50 -S/D/Y Day Pass \$1.25	10 to 15 minute window, before or after the scheduled pick-up time	(530) 885-BUSS (540) 745-7570 (916) 788-2324 CTSA (530)888-7433 24 hours in advance; same-day requests accommodated on a space available basis	Must call at least 2 hours prior to scheduled pick-up time not to be counted as no-show. After 3 no-shows, may suspend riding privilege.
Granite Bay Dial-A-Ride	Contracted to PRIDE Industries	Community of Granite Bay and to Galleria	M-F 9 a.m. to 11 a.m. M-F 2 p.m. to 4 p.m.	General Public	-Children <5 – free -Transfer to PCT fixed route. - free	Curb-to-curb service		
Highway 49/ Auburn Dial-A-Ride	Contracted to PRIDE Industries	Auburn, ¼ mile of Highway 49 Route; including Ophir Rd. by reservation	M-F 6 a.m. to 7:30 p.m. Sat. 8 a.m. to 6 p.m.	General Public				
Taylor Road Shuttle	Contracted to PRIDE Industries	Between Auburn & Sierra College; ¼ mile deviations of Taylor Road	M-F 6:30 to 7:15 p.m. Sat 9:45 a.m. to 5:30 p.m.	General Public	-General public - \$2 -Senior./ Disabled - \$1 20 Ride Passes	Reservation required for deviated pick-up	(916) 788-2324	
City of Auburn	City operated	City of Auburn, deviated fixed-route pickup within ¼ mile of two routes (Red and Blue)	M-F 6 a.m. to 6 p.m. Sat. 9 a.m. to 5 p.m.	General Public	-Adult \$0.80 -Senior/ Disabled/ Student - \$0.60 Day Pass \$2 -Children <5 – free -Transfers to PCT – free (only continuing riders)	Limited to 3 deviations per route. Real-time scheduling; rider can't book pick-up ahead. Deviated service curb-to-curb	530-906-3700 (driver) 530-823-4211 (info) Can call driver to request deviation pick-up or to ask questions about route.	Not applicable
City of Lincoln	City operated	City limits, connecting to Galleria	M-F 8 a.m. to 5 p.m.	General Public	-All riders \$2 11 trip punch pass for dial-a-ride - \$20	-Curb-to-curb; -2 min. to 15 dwell time -Possible 1 hour ride time	(916) 645-8576 Two hours up to two weeks. TTD (800) 735-2922	At least one hour in advance to cancel; within 15 minutes counted as no-show.
City of Roseville	Contracted to MV	City limits, connecting at Galleria and Louis Lane at Orlando; Sacramento or PCT.	M-F 6 a.m. to 8 p.m. Sat. and Sun. 8 a.m. - 6 p.m.	General Public ADA priority	-Adult - \$3.75 -Senior/Disabled/ ADA - \$2 -Children <5 – free	- 15 min. before or after - 1 hour ride time - Curb-to-curb - Subscription reservations	(916) 774-5757 TDD 774-5220 Call day before between 8 a.m. to 5 p.m. Same-day if available.	At least two hours in advance to cancel. Notice of possible suspension if 4 or more no-show
Pride/CTSA	PRIDE Industries	County areas, connecting at Galleria; pick-up or drop-off I to Sacto.	M-F 6 a.m. to 9 p.m. Sat 8 a.m. to 6 p.m.	Seniors & Persons w/Disabilities	A "nominal fee"; fares not published	Medical trips, work trips	(530) 888-7433 (916) 788-2330	Not published

4.4 CITY OF ROSEVILLE DIAL-A-RIDE

Operating Authority

The City of Roseville operates a general public dial-a-ride service, contracting its operations to MV Transit, a commercial operator.

Operating Characteristics

The City of Roseville Dial-A-Ride provides between 110 to 130 one-way trips per typical weekday. It operates a formalized ADA complementary paratransit program, providing same-day services to its riders which may include the general public. It has an ADA certification process with its application available on-line. Priority service is provided to ADA certified riders. Services operate seven days a week, starting at 6 a.m. on weekdays and at 8 a.m. on Saturday and Sundays. Service runs until 8 p.m. on weekdays and ends at 6 p.m. on Saturdays and Sundays.

Riders who are ADA certified, seniors or persons with disabilities are paying a \$2 fare while adult members of the general public are paying \$3.75. Children ages 5 and under are free.

The service is operating on an advance reservation basis but riders may call and request a ride for the same day and will be served if the trip can be scheduled. A performance standard of pickup within 15 minutes before and after the scheduled pick-up time is published. The operator reports that this is achieved 95 percent of the time.

Subscription services are estimated at between 30 and 50 percent overall but may run up to about 70 percent during selected peak periods, as reported by staff. It may be possible to manage a greater number of subscription trips and still handle demand response requests. This could increase efficiencies.

Major trip generators include medical facilities (Kaiser and Sutter clinics), the Galleria, RAC (a sheltered workshop) Imaging Dialysis, and UC Davis Professional Drive offices.

Trips that can't be served are estimated by staff at five to seven a day. These are mostly Lincoln to Roseville or Roseville to Auburn or the reverse of such trips.

Facilities and Equipment

The service is operated out of a 2,400 square foot office in the City yard, occupied by the contractor's staff. Trapeze software for computer-assisted dispatching has been in place for about one year and is leased by the contractor to the City. Two call taker/ dispatchers field calls and schedule trips during peak periods which are generally between 6 to 9 a.m. and between 12:30 p.m. until 3:30 p.m. Staff attempt to get to calls within one minute and if a caller is on-hold for more than one minute, a light on the console goes from green to red.

Twelve vehicles are dedicated to the Dial-A-Ride service, with eight to nine vehicles operating in peak service. The most recent California Highway Patrol terminal inspection was satisfactory after an unsatisfactory rating in a prior period. Maintenance is currently provided by City staff at the City's corporate yard. The Transit Master Plan for South Placer County has noted that there is "insufficient capacity to accommodate and promote efficient maintenance practices for the

Roseville Transit bus fleet in the short term.” (p. 36, April 2007 draft). This report also notes that the anticipated technology enhancements planned for vehicles (automatic vehicle locator systems, fare collection, closed circuit television and on-board data recorders, among other items) will require additional maintenance capabilities.

Drivers currently pick-up the Trapeze generated logs at the office, at the beginning of their shifts, and manually enter information about passenger pick-up and drop-off experiences.

Recommendations from the Roseville Transit Short Range Transit Plan (2005)

The most recent Short Range Transit Plan anticipated modest growth in demand for services, despite a slight decline in ridership over that previous reporting period, and forecast an additional 2,600 annual service hours, about a 4.7 percent increase. One service expansion vehicle was proposed in each of two successive years, with an additional back-up vehicle recommended as well. Among the issues suggested by this plan were:

- ***Increasing the efficiency of ADA services*** through increased fares for ADA riders, reducing the reservation window from 14 to seven days, instituting changes to the subscription policy, re-certifying ADA riders through increased in-person visits, providing free-fare trips on fixed-route for ADA riders and implementing an educational program for agency personnel to increase understanding about the limitations of dial-a-ride services.
- ***Expanding Roseville Dial-A-Ride***, in anticipation of city population increases, through an increase of almost 5 percent a year in revenue service hours or 2,600 annual service hours and expansion of one vehicle in each of two successive years, with an additional back-up vehicle recommended as well.
- ***Spanish-speaking trips scheduler*** was recommended to meet the needs of Spanish speaking consumers.

In terms of follow-up, the City of Roseville has continued to formalize its ADA program and is generally monitoring subscription service utilization. Dial-A-Ride fares were increased somewhat, although not to the level potentially set forth which would be two times the base fixed route fare. The vehicle fleet size has been modestly increasing. And a second call taking/dispatch position was added. The City has also worked with the TOWG and PCTPA to establish a Transit Ambassador program to train potential users of transit services.

Issues and Considerations

The following issues were identified as topics of concern through discussion with staff, dispatchers or with riders on the ride-along.

- ***Vehicle maintenance*** is an area of concern, potentially once a week or so experiencing difficulty in getting the paratransit vehicles into service. Transit vehicle maintenance is third in line behind police and trash, with paratransit vans coming after fixed-route.
- ***No ADA capacity problems*** appear to exist as staff report there are no trip denials for ADA riders or with denial of general public riders for that matter. It appears that a negotiated time can be developed satisfactorily for most riders, when trip requests are

made during peak periods. These are fairly long periods, about three hours, in the early a.m. and from mid-day (12:30 p.m.) until mid-afternoon. There is a road supervisor who is able to pick-up any stranded passengers.

- **The no-show policy may be too tight** as it is based upon a one-minute wait and this may be insufficient time for some more disabled, frail or slower-moving riders to make themselves known to the driver.
- **The morning peak period has greatest demand** and is the timeframe most likely to require road supervisor back-up with passenger pick-ups.
- **Need for smoother, easier mechanisms for transfer** between services was observed by staff; the multiple transit players in the County can be confusing.

Customer comments from riders on the “ride-along”:

- Industrial areas of Roseville are letting out earlier than 6 p.m. and others later than 8 p.m. Current service hours of Dial-A-Ride are a problem.
- Some vehicles breaking down.
- Appreciate service very much
- Need to be able to get to Sutter Terrace.
- Appreciate the service availability until 7 p.m.
- All of the drivers are nice and seem to like what they are doing; appreciate that as a rider.
- Riders were not aware of CTSA. “What is that?”

4.5 CITY OF LINCOLN DIAL-A-RIDE

Operating Authority

The City of Lincoln directly operates its municipal public transit program, including both fixed route and demand response services. Drivers and dispatch staff are employees of the City.

Operating Characteristics

Lincoln’s Dial-A-Ride program provides about 15 trips per day within the Lincoln city limits or connecting to with Roseville Dial-A-Ride at the Galleria.¹¹ Riders are generally seniors or persons with disabilities but members of the general public may also request rides. The service operates only on weekdays, between 8 a.m. and 5 p.m., hours roughly congruent with the fixed-route. Notably, this is not an ADA complementary paratransit program as the three Lincoln fixed-route services provide deviation, upon request, to pick up passengers within a ¾ mile band who cannot otherwise access the fixed-scheduled services.

Dial-A-Ride reservations may be made on the day of service, at least two hours before the trip is needed, or up to two weeks in advance. Riders can leave a message on the voice mail if they call in after hours. Staff report that there are no denials; that all requested trips within the

¹¹ Lincoln dial-a-ride supervisors report that trip-making levels doubled in FY 06, to almost 30 one-way trips per day.

service area can be served. Some group trips are presently scheduled on a dial-a-ride back-up vehicle, as availability permits, to destinations outside the service area.

Trip purposes are largely for medical reasons or for shopping, although there is no trip purpose restrictions are established for Lincoln Dial-A-Ride services.

Facilities and Equipment

The Lincoln program is dispatched out of a city-owned building adjacent to City hall, with vehicles maintained at the City yard. Six vehicles are available to the total Lincoln transit program, with two vehicles operating in the dial-a-ride service. All vehicles are lift-equipped. While riders are generally ambulatory persons, there are a number of individuals in wheelchairs at Lincoln Manor which has a large number of residents in wheelchairs. At Lincoln Manor there can be need for four wheelchair tie-downs at one time. Two vehicles can serve this need but it is difficult with potentially up to five passengers in wheelchairs requiring a trip at one time.

Dispatching is done manually, using a template that divides the hour into four 15-minute segments and enables the dispatcher to book trips, potentially adjusting the pick-up sequence as necessary as new requests come in during the day. Observation suggests that a significant majority of the reservations are same day trip requests. An informal registry of users is maintained and dispatchers are familiar with the names and home addresses of most riders.

One administrative FTE is currently assigned to the Lincoln transit program for oversight of day-to-day operations and dispatching, including responsibility for all dial-a-ride supervisory and reporting requirements. There are now two full-time dial-a-ride drivers with shifts from 8 a.m. to 5 p.m.

Transfers to and from the Roseville Dial-A-Ride can be aided by the Lincoln dispatcher, with meets between the vehicles set up for the trip in both directions. Staff reports an informal no-show policy with drivers waiting up to two minutes for riders and recording them as no-shows if they do not appear within that window.

Recommendations from the Lincoln Transit Short Range Transit Plan (2005)

The SRTP identified a fare box recovery issue related to the difficulty of the deviated fixed-route in making the minimum 10 percent required farebox return. This impacts the Dial-A-Ride program in that it requires it to achieve a higher farebox return in order to offset the lower deviated service farebox return. The SRTP consultants conclude that:

“This suggests that the City of Lincoln has not yet achieved the population density and concentration of activity centers that make an extensive fixed-route and deviated fixed-route service financially viable. Nonetheless, as the city continues to develop, the financial efficiency of the existing deviated fixed-route service will likely improve as ridership continues.”¹²

¹² Placer County Transportation Planning Agency Lincoln Transit Short Range Transit Plan Update, LSC Transportation Consultants, Inc., December 2004, pp. 9-4.

Recommendations at that time (late 2004) included eliminating deviated-fixed route in low demand areas and expanding service in developing areas:

- modifications to Route 203 to replace service to Lincoln Business Park and the airport with demand response service;
- reconfiguring deviated fixed-route services to a single route with two demand response vehicles;
- expand service over five years to meet planned major developments in the City's specific plan.

Lincoln Transit has developed maximum flexibility with its small fleet, operating now three deviated fixed-route service and a two-vehicle Dial-A-Ride service. The *Transit Master Plan for South Placer County* (June 1007) anticipates increases in the Lincoln Transit programming, including additional demand response vehicles, consistent with the planned development of the City.

Issues and Considerations

This program is clearly small, with one to two vehicles in Dial-A-Ride service, and seems to be managing well within its currently prescribed scale of operations. Long range planning clearly envisions growth in both fixed-route and demand response services in order to accommodate development both under construction and/or planned for the foreseeable future. To position itself for this growth, Lincoln Dial-A-Ride will likely have to accommodate more traditional demand response technologies and procedures that accompany increases in size.

Driver comments from the "ride along":

- There can be as many as 6 to 8 passengers a day who require use of the lift. Shift is 9 to 5 on week days.
- There are kids on the buses sometimes; a mix of seniors and general public.
- Carrying some riders to the Galleria regularly. Connecting there to Roseville. Need to get to and from Lincoln Hts. and to Sun City.
- Some riders have multiple trip needs, like rider previous day who had to go from home to Safeway, to City Hall, to the bank, back to City Hall and then home. The driver worked her in so that the passenger had a minimum of waiting time to make all these trips.
- Policy regarding bags is to carry them to the door. Door-to-door transportation is possible for those who need it.

Customer comments from riders on the "ride-along":

- Going shopping and down to the Galleria on Saturday.
- Need evening and weekend transportation.
- Needs to get to Kaiser for medical appointments on Tuesdays.
- Using friends for transportation when necessary but prefers the independence of using Dial-A-Ride.
- Desire to go to Wynco, near the Walmart in Roseville.
- No knowledge of CTSA or transportation by Pride.
- In order to connect with the Roseville Dial-A-Ride for trips around Roseville, had to set up the trip for Galleria on Roseville Dial-A-Ride oneself and then the return trip on Lincoln Dial-A-Ride. Rider reports it is possible but one must know how to arrange it.

Some concerns about Lincoln Dial-A-Ride have been received into the public record, through the unmet needs process, suggesting that it may be difficult for newcomers to the service to get onto the Dial-A-Ride. Although a zero trip denial rate has been reported, this is not documented and there is some concern that dispatch procedures may dissuade prospective new riders. Documentation of such issues will require further analysis.

4.6 CITY OF AUBURN DEVIATED FIXED ROUTE

Operating Authority

The City of Auburn Public Works Department operates a deviated fixed route service throughout the City. Auburn Transit's service is included in this review of South Placer County demand response services because of its capability to provide curb-to-curb service through deviations to pick up riders at their point of origin or to drop them at their destination.

Operating Characteristics

Auburn Transit provides between 180 and 200 trips per day on its deviated fixed route service. The Red Route and the Blue Route operate with hourly headways. Auburn Transit provides fixed-schedule service between checkpoints throughout Auburn and into North Auburn, deviating up to $\frac{3}{4}$ of a mile upon request. The service operates on weekdays between 6 a.m. and 6 p.m., with a more limited route operating on Saturdays, between 9 a.m. and 5 p.m. There is no service on Sundays.

Deviation policy is for requests that are received by the driver, through a cell phone on the vehicle. Passengers may request a deviated pick-up at the time of travel that is within the particular route timeframe as there is no mechanism for an advance reservation to be made through the driver. There is no separate fare for deviated pick-ups and the deviation pick-up option is not described on the Auburn Transit brochure. Noted only are the several "call-in" stops in the southern part of the city with the Call-In stop and the Auburn Transit Bus Driver numbers noted on that flyer.

Facilities and Equipment

The City fleet includes five (5) vehicles, all mid-sized 22 to 25 passenger buses. Vehicles are maintained at the Corporation Yard on Blocker Drive. The Maintenance Department provides transit vehicle maintenance, as well as to City Police, City Fire, City Public Works, City Wastewater Treatment and City Building Department vehicles.

Because the service is self-dispatching, with calls going directly into the driver, there is no dispatch position. Information about Auburn Transit is available through a recorded message that goes to a telephone number at City Hall. Transfer locations include the Nevada Street Auburn Transit Center. Auburn Transit staff includes one $\frac{3}{4}$ time administrator, three full-time drivers with one serving as supervisor, a permanent part-time driver and three part-time temporary drivers.

Recommendations from the Auburn Transit Short Range Transit Plan (2004)

The Short Range Transit Plan Update (December 2004) based its recommendations upon concerns about declining ridership and a too-low fare box return ratio. Recommendations included:

- Eliminating weekend service on both Saturdays and Sundays.
- Improving the consistency of checkpoint deviation services throughout the service day.
- Providing service to Gray Horse and Vintage Oaks Subdivisions
- Extending the daily span of Saturday service

Auburn Transit did work to improve the regularity, and therefore the reliability, of its deviation service, operating on hourly clock headways so that riders can find the service more predictable. Sunday service was eliminated. Saturday service was not eliminated but operating hours now go until 5 p.m., extending service one hour beyond the 8 a.m. to 4 p.m. service span.

Issues and Considerations

Driver log information does not currently record the number of deviations served. A maximum of three deviations can be picked up on every run. If this maximum were regularly achieved, about one-third of the trips or between 50 to 60 deviations could possibly be picked up or dropped off on a typical weekday. Probably this is high. The 2004 SRTP identified a total of 41 deviations during a sample week.

During the afternoon “ride along” in January 2007 the 2 o'clock to 3 o'clock *Blue Route*, three instances of deviation service were observed. Two deviations were at the pick-up end of the trip and at the drop-off trip in one instance. Auburn Transit staff estimates the service is picking up between 20 to 25 deviations per day, which is considerably higher than the SRTP estimate of just 41 deviations per week. A weekday average of 20 deviations per day represents 5,100 specialized transit trips annually, a significant number of trips and between 9 and 10 percent of all trips provided.

Observations from the ride-along:

- Calls to the driver included a regular rider calling to confirm that the bus was coming by his/ her home and a rider calling to ask where the nearest stop was to his/her home.
- There was an obvious high satisfaction level expressed by consumers about the service. The driver knew most passengers by name.
- Driver longevity was identified by the driver as a reason for the high levels of service provided to consumers, in terms of knowing the riders and their regular travel needs.
- The driver commented that maintenance priority for the transit vehicles seems adequate within the city yard as the vehicles are not held up long or unavailable when needed.
- A rider commented upon how helpful it was to get information about the service when she asks the drivers because she is unsure of stops or timing.
- Youth are using the bus regularly, traveling home from school or after-school activities.
- Some concern expressed by riders about the reliability and on-time performance of Auburn Transit, if it grows into new areas where there is housing development (Valley Oaks, North Auburn).

4.7 Placer County Transit (PCT) Dial-A-Ride and Deviated Fixed-Route Services

Operating Authority

The County of Placer contracts for provision of its demand response service. Pride Industries provides the three services discussed here, as the CTSA, under contract to the County of Placer, through Placer County Transit (PCT).

Operating Characteristics

General public dial-a-ride services are operated on behalf of the County in three geographic areas, with the Taylor Road Shuttle operating as a deviated fixed route between Auburn and Sierra College in Rocklin. These services are referred to as:

- Rocklin/ Loomis Dial-A-Ride
- Granite Bay Dial-A-Ride
- Highway 49/ Auburn Dial-A-Ride
- Taylor Road Shuttle

The Highway 49/ Auburn Dial-A-Ride is the most heavily utilized of these services, carrying about 60 passengers on a typical weekday. The Rocklin/Loomis Dial-A-Ride and Taylor Road Shuttle each carry around 30 to 35 passengers per weekday. The Granite Bay service is the smallest of the four, carrying about 3 to 5 riders on an average weekday.

The first three programs, Rocklin/ Loomis, Granite Bay and the Highway 49/ Auburn Dial-A-Ride are traditional demand response services, with advance reservations required. Riders request the trip 24 hours in advance but may place a same-day request which will be served if space is available on the vehicle.

The Taylor Road Shuttle is a deviated fixed-route service that runs every two hours between Auburn Station and Sierra College in Rocklin along Taylor Road, with stops at Ophir Park and Ride, Newcastle, Penryn and Loomis. The service will deviate, upon request, to pick up or drop off a rider within $\frac{3}{4}$ of a mile of the route.

The Rocklin/Loomis, Taylor Road Shuttle and the Highway 49 Dial-A-Ride each operate on weekdays, starting at 6 a.m. and ending between 7:30 and 8 p.m. Both have Saturday service, running from 9 a.m. to 4 p.m. for Rocklin/Loomis and from 8 a.m. to 6 p.m. in Auburn. The Taylor Road Shuttle begins service at 6:35 a.m. and completes its last run by 7:15 p.m. Saturday service operates between 8:35 and 5:15.

The Granite Bay program operates more limited service, with just two hours of service, from 9 a.m. to 11 a.m. in the mornings, and another two hours of service, from 2 p.m. to 4 p.m. in the afternoons. Service is only available on weekdays.

Service policies are published in a flyer by the County that describes the service areas, fares, and the schedule for the Taylor Road Shuttle and for the dial-a-ride services, the 15 minute pick-up window, before and after the promised time and noting the cancellation and no-show policies.

Review of PCT Operating Contract with Pride Industries

Appendix A presents an analysis of the terms and conditions of the operating contract that PCT holds with Pride Industries related to its Taylor Road Shuttle service. This service was competitively bid and, with Pride Industries winning this procurement, represents a restructured way in which PCT and Pride Industries are doing business which is in relation to the terms of a well-structured agreement. Various comments are offered with respect to the contracts clauses and the enforceability of some of these (Appendix A).

Recommendations from SRTP Update for Placer County Transit (June 2005)

Although the SRTP recommendations related to Placer County Transit were extensive, largely in anticipation of growth in the county and continuing demand for services, specific dial-a-ride recommendations were more limited. These two recommendations were:

- Increase Highway 49 DAR service to match Highway 49 fixed-route span service
- Provide Granite Bay DAR using Roseville DAR

The Highway 49 service has been extended to ensure fully compliant ADA complementary paratransit service are provided. At present, the Granite Bay DAR remains the contractual responsibility of PCT's contractor, Pride Industries.

Issues and Considerations

PCT is clearly providing many of the "missing links" in South Placer County with respect to specialized transportation, with its services between Auburn and Roseville, and to and from various unincorporated communities of Rocklin, Loomis, Penryn and others. There may, however, be insufficient information available to members of the public about the reach of PCT services as there is a perception that you cannot readily get from Auburn to Roseville or travel the north-south corridor easily. Although the trip can be made in both directions, issues of frequency and the potential need for transfers make it a potentially discouraging trip to make.

Of some significance, even door-to-door service is potentially available if consumers need or request it. Many public transit programs have pulled this service back, providing only curb-to-curb service in order to ensure maximum efficiencies. The value of this was noted on the "ride-along" when the boarding of a single passenger took more than 20 minutes and required a high level of assistance from the driver. The dwell time necessary for this single rider was not a problem as it occurred during a mid-morning, low period of demand in the Rocklin area. The passenger, well-known to the driver, was using the service for his single weekly outing to an area shopping center where he would spend several hours doing grocery shopping and eating at a restaurant. The driver commented that she understood that the Dept. of Public Social Services was monitoring this individual to see whether he could appropriately continue to live independently. Clearly the PCT dial-a-ride was helping to make that possible, but so too was the policy of door-to-door assistance from the driver.

4.8 PRIDE INDUSTRIES – CTSA

Operating Authority

Pride Industries acts as a contractor to Placer County Transit, operating its dial-a-ride programs and the Taylor Road Shuttle. Additionally, Pride Industries is the *designated consolidated transportation services agency* (CTSA) with operating authority established through a resolution between PCTPA and under a Memorandum of Understanding, initially executed in 1983 and reauthorized in 1997.

Operating Characteristics

Pride Industries provides a number of services, including transportation services to persons with disabilities. Under contract to PCT, Pride provide general public dial-a-ride service, as the CTSA discussed above, operating in Auburn, Rocklin and Loomis, Granite Bay and the Taylor Road Shuttle

The organization's published mission statement reads:

“CTSA is dedicated to providing transportation services to people with disabilities, senior citizens, social service agencies, health care providers, various organizations and individuals within South Placer County.”

There was difficulty through the course of the study in enumerating what services the CTSA is providing. Included as Appendix B is the flyer that is published by Pride Industries to describe its CTSA transportation services. Two telephone numbers are available to consumers who request trips. The following statements can be made, based upon information provided in the flyer:

- Fares are not enumerated, but identified as “for a nominal fee...”
- Eligible persons are identified as seniors or persons with disabilities.
- Medi-Cal clients are accepted.
- The service areas for which services are offered are not identified, except for a statement that public transportation is available between Foresthill and Auburn, leaving each morning and returning in mid-afternoon. Specific time for the “scheduled service” are not identified.

- CTSA Services provided may include:
 - Trips to “primary” destinations of training or educations
 - Lifeline service, involving a volunteer who can assist qualified persons who need to travel to medical appointments
 - Trips for visiting convalescent homes

Facilities and Equipment

Varying vehicle counts are documented for the CTSA. Pride Industries reports availability of 60 vehicles to support CTSA activities in the survey activity conducted in the early phase of this study. The PCTPA Master Plan identifies a total of 33 vehicles associated with CTSA (April 2007). The CTSA Triennial Performance Audit (May 2007) identifies 43 vehicles, enumerating detail on these vehicles. The SRTP Update (December 2004) identified a 38 vehicle fleet, noting that all vehicles are accessible and all have been purchased with § 5310 funding.

Trapeze is used for computer-aided dispatching, although staff indicate that it is an older version of Trapeze and has not been updated. A consequence of this is that it is very difficult for staff to develop reports on trips provided.

Vehicle maintenance is provided on-site at Pride with two maintenance service bays and parking for vehicles in a fence-enclosed, protected area.

Staffing positions, as identified in the Triennial Audit, include a transportation manager position, a dispatch supervisor and 5 dispatcher positions, an office manager, a senior database analyst, a maintenance supervisor and 2 maintenance positions, a road supervisor and 29 driver positions. In terms of total FTEs (full time equivalent positions) this represents approximately 42 positions, plus the CTSA Transportation Manager.

Summary of CTSA Audits

1. CTSA Transportation Development Act Funds Audit Report, June 30, 2006

This annual certified financial audit was conducted pursuant to the requirement of § 99245 and § 99276, California Public Utilities Code, Chapter 4, Transportation Development.

As a certified financial audit, the objective of this analysis is to test and report on the validity of the financial statements and accounting practices of the Consolidated Transportation Service Agency and not specifically of its compliance with other requirements associated with receipt of TDA funds.

The audit found nothing to cause the auditors to believe that the TDA funds allocated for transit purposes by the CTSA failed to comply with the Statutes, Rules, and Regulations of the Transportation Development Act and the allocation instructions and resolutions of the Placer County Transportation Planning Agency. "However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion." [Draft Audit Report, Compliance Letter]

Notwithstanding that statement, review of the "Notes to Financial Statement" does lead to a question about Note 2, Fare Box Revenue. This note states that "The Agency is required to maintain a *Farebox Revenue to Operating Cost Ratio* of 10% in unrestricted operations in order to comply with the Transportation Development Act." For 2006, the note lists "Fare-box revenue" of \$960,183 against Net Operating Cost of \$1,710,494, for a "Fare revenue percentage" of 56%. Analysis of the fare revenue figure cited, however, indicates that this figure includes the total value of the contract with Placer County Transit in the amount of \$903,465 for operation of the Hwy 49, Rocklin-Loomis and Granite Bay demand responsive services, which may not be "fare revenues" according to the definitions of the National Transit Database. Reclassification of these contract revenues would significantly lower the CTSA's farebox revenue ratio below the required level of 10%.

2. CTSA Triennial Performance Audit

Triennial performance audits of all operators are required by § 99246 of California Public Utilities Code, Chapter 4, Transportation Development Act, to "...evaluate the efficiency, effectiveness, and economy of the operation of the entity being audited..." The most current

Triennial Performance Audit of the CTSA covers the period through June 30, 2006 and is just in the process of being completed by Moore & Associates.

With regard to this South Placer County Dial-A-Ride Study, the audit reported significant findings in two areas: data accounting and reporting and fare revenues.

Data Accounting and Reporting

The audit found that CTSA transportation expenditures could not be segregated according to the service being operated; that data relating to Placer County Transit contract services has been included in the CTSA statistics reported to the State Controller for many years; and that CTSA data has also included data relating to contract services operated for Sonoma County. Furthermore, the audit was unable to analyze CTSA performance indicators due to persistent inaccuracies in reporting by Pride Industries. The audit recommends that a high priority be placed on engaging an independent consultant to establish proper accounting and reporting systems and procedures.

Fare Revenue Requirements

Pursuant to Public Utilities Code § 99268.4, the audit notes that the CTSA is required to achieve a ratio of fare revenues to operating cost at least equal to one-tenth (or 10 percent). The audit found that the CTSA failed to satisfy this requirement, achieving only 7.0 percent in FY 2005/06 and 6.3 percent and 8.0 percent in the preceding two years. Failure to meet this requirement could result in a reduction of the CTSA's allocation of funding by an amount equal to the shortfall in fare revenues.

Further, the failure to achieve the required fare revenue ratio triggers a requirement under § 99268 that limits the TDA funds received to no more than 50 percent operating costs. The CTSA was found to fail in meeting this requirement in the past two fiscal years, FY 2004/05 and FY 2005/06.

Other Issues and Considerations

Comments from Interview with Pride Industries/ CTSA Staff

As CTSA staff report it, the history of the CTSA function in South Placer County was that initially it was an entity unto itself which was then absorbed by Pride Industries in 1997. The contract for TDA funding was not let competitively but granted to Pride Industries as, at that time it was the only entity expressing interest in providing specialized transportation services to South Placer County residents.

The CTSA was seen as a way to serve the unserved riders, as Pride Industries/ CTSA staff describe the situation. CTSA services were not constrained by the same boundaries and service areas of the municipally-operated paratransit programs that operate within city jurisdictions. The ethos here, as staff indicate, was to serve farther away trips and the unserved trip, everywhere. Additionally, Pride Industries staff hoped that the CTSA might provide a platform for job creation for Pride consumers with disabilities. It was thought too that the CTSA umbrella might be able to serve Kaiser trips and other medical trips and destinations where the rider did not live in the local community of near the medical facility.

Pride Industries/ CTSA staff report a solid working with other municipal providers, notably a working partnership with Roseville to start and stop in the vicinity of the Galleria. Staff indicated a mutual desire to extend both the CTSA and the Roseville services by establishing a “meet” there. Boundaries were understood to be important though. This has been, reportedly, somewhat confusing to riders. CTSA staff indicated that riders understand the two meets at the Galleria, but with the Walmart and Target less than 200 yards away, and riders unable to be transported there, riders have expressed confusion and frustration.

Staff indicted too that vehicle maintenance and driver training were areas of potential coordination as these are challenging functions for all operators and may offer opportunity for reduced costs through economies of scale on collaborative efforts.

4.9 ANALYSIS OF PRIDE INDUSTRIES CTSA-OPERATED TRANSPORTATION SERVICES

Through the course of this study effort, there was difficulty in obtaining data from the CTSA that would meaningfully describe the services provided. After multiple requests for detailed information, the Pride Industries staff were able to produce a set of Trapeze reports, in PDF format, that detailed all CTSA and PCT contract services for a sample week in January. The consultant team was able to convert these PDF files into formats that could be imported into Access database, manipulated there and then exported for GIS analysis.

This analysis will show where passengers using the Consolidated Transportation Services Agency’s (CTSA) Dial-A-Ride services are picked-up in and around South Placer County. It begins with a description of all the Dial-A-Ride service providers and their areas in this region and then focuses on CTSA’s Dial-A-Ride, Medical and other passengers. Passenger data for a sample week is then analyzed and mapped to identify where these trips are originating. Appendix C presents the trip counts by service derived from this analysis

Origin of Passengers: Pride CTSA Service

During the week of January 22-27, 2007, there were a total of 2,192 passenger trips taken on Pride’s Consolidated Transportation Services Agency (CTSA) vehicles, according to information from their Trapeze database. Twenty-four percent of these trips were for PCT contract dial-a-ride passengers, four percent were for medical passengers and the remaining 72 percent were for general CTSA passengers. All three of these services operate between Monday and Friday while only the PCT contract dial-a-ride service operates on Saturday. The following analysis of these three passenger groups identifies where these trips originated and how many passengers were picked-up at each site.

Methodology

CTSA provided information on both trip origins and destinations however only the trip origins were evaluated. They were first grouped according to the type of passengers being served; CTSA contract Dial-A-Ride, Medical trips or general CTSA service. Next, the origin addresses in each group were summarize so that each was listed only once along with its associated passenger count. These addresses were then “geocoded” using a Geographic Information System or GIS. This is the process of converting individual addresses into points on a map. Each point represented an origin address and was associated with anywhere from one to 343 passengers. The number of passengers picked up at a location was then used to determine the

point size for that address symbol. There were a limited number of addresses and trips that could not be geocoded due to problems with either the addresses or its spelling.

Origin Findings by Service Type:

1. CTSA Contract Dial-A-Ride Service

Figure 4-2 shows the origin locations of CTSA's Dial-A-Ride passengers served during the week of January 22 – 27, 2007, provided on behalf of PCT contracts. These include the Rocklin/Loomis, Granite Bay, Highway 49/Auburn and Taylor Road Shuttle services. There were a total of 495 contract Dial-A-Ride trips taken to 131 addresses during this period. Fifteen of these addresses and 29 trips were left off the map however due to spelling or address problems.

The map shows a concentration of trips originating within the City of Auburn as well in North Auburn along Highway 49. The Amtrack Nevada Street Station (62 passengers) and PRIDE of Auburn (14 passengers) are among the most common origin locations in this area. Further south, additional contract Dial-A-Ride trips are originating in the Rocklin/Loomis area and along Interstate 80. Sierra College (50 passengers) in Rocklin is the most important pick-up location in this area. A list of these and other top origin locations for CTSA's contract Dial-A-Ride Service is included on Table 4-1. Addresses reflect a number of churches, schools, stores and residential locations where 5 or more Dial-A-Ride passengers were picked-up during this week. To protect riders' confidentiality, the actual addresses are not shown on Table 4-1.

2. CTSA Medical Service

Figure 4-3 shows the origin and volume of CTSA's Medical trips on weekdays between January 22-26, 2007. There were only 93 Medi-cal trips taken during this period to a total of 93 addresses. Two addresses and two trips were left off the map due to issues related to either spelling or the address.

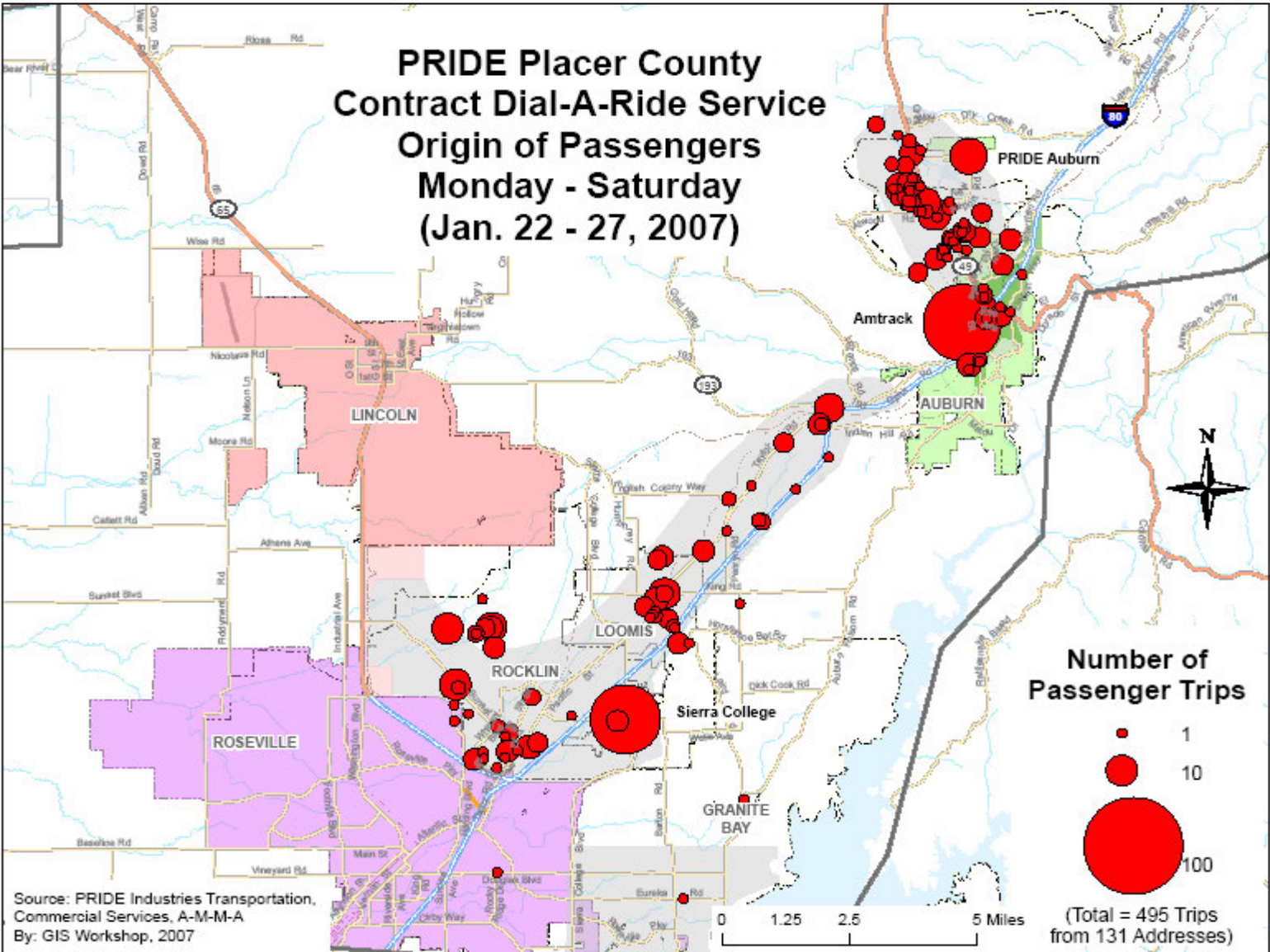
The map indicates that these Medical trips originated in various locations throughout South Placer County and North Sacramento County. Top origin locations include PRIDE of Sacramento (19 passengers) and Orange Grove School (11 passengers) in Sacramento and the New Life Center (7 passengers) in Loomis. Additional locations where four or more passengers were picked-up during this week are shown on Table 4-2, with specific addresses deleted to protect rider confidentiality.

3. CTSA General Service

Figure 4-4 shows the location and number of CTSA's general service riders traveling between Monday and Friday, January 22 – 26, 2007. These passengers took a total of 1,575 trips during this period from 188 addresses. Fifteen of these addresses and 59 trips were left off the map due to spelling or address problems.

The map indicates that most of these trips originated in either the North Sacramento or Roseville areas. Among the most popular origin locations were Orange Grove School (343 passengers), PRIDE Display Way (34 passengers), and St. Marks Short Center (8 passengers) in Sacramento along with PRIDE of Roseville (149 passengers) and AIM Higher (66 passengers) in Roseville. Other top origin locations include Easter Seals (34 passengers) in Yuba City, the Auburn Transition Center (28 passengers) and PRIDE of Auburn (17 passengers). Other popular origin locations are listed on Table 4-3 with addresses deleted.

Figure 4-2



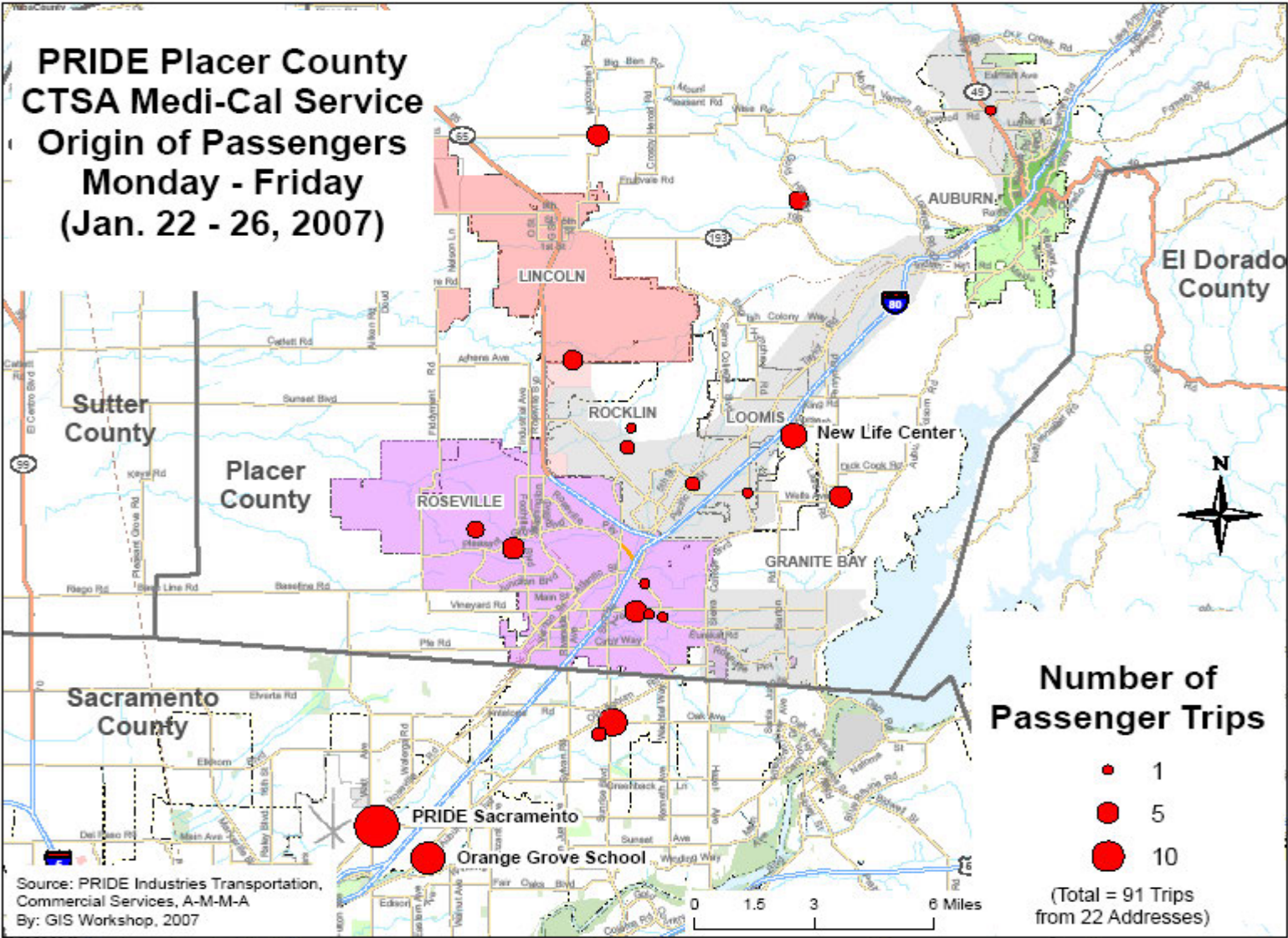
**Table 4-2, PRIDE Placer County CTSA
Placer County Transit Contract Dial-A-Ride Services
Top Origin Locations
Monday - Saturday
January 22- 27, 2007**

Rank	Address	ZIP	City	Description of Address	Number of Trips Originating From This Location
1		95603	AUBURN	AMTRAK AUBURN	62
2		95677	ROCKLIN	SIERRA COLLEGE	50
3		95602	AUBURN	PRIDE AUBURN	14
4		95602	NORTH AUBURN	BEL AIR	11
5		95603	NORTH AUBURN	ROCK CREEK SCHOOL	11
6		95765	ROCKLIN	FAMILY FITNESS	10
7		95765	ROCKLIN		10
8			LOOMIS		10
9		95765	ROCKLIN	Victory High School	9
10		95658	NEWCASTLE	CAROL'S MARKET & DELI	9
11		95603	NORTH AUBURN	GOLDEN CHAIN MOBILE HOME PARK	9
12		95602	AUBURN	emerald hills	6
13		95603	AUBURN	AUBURN GARDENS CONV HOSPITAL	6
14		95602	AUBURN		6
15		95650	LOOMIS		6
16		95677	ROCKLIN	LYNROCK APT	6
17		95603	NORTH AUBURN		5
18		95603	AUBURN	SENIOR CENTER	5
19		95603	AUBURN		5
20		95603	AUBURN		5
21			ROCKLIN	VICTORY HIGH SCHOOL	5
22		95603	NORTH AUBURN		5
23		95603	AUBURN		5
24		95650	LOOMIS		5
25		95650	LOOMIS		5
26		95765	ROCKLIN		5
27		95603	AUBURN	ALBERTSONS	5
28		95677	ROCKLIN		5
29		95677	ROCKLIN		5
30		95650	LOOMIS	FIRST ASSEMBLY OF GOD CHURCH	5
31		95603	NORTH AUBURN		5
32		95677	ROCKLIN	SUNSET CHRISTIAN CENTER	5
33		95658	NEWCASTLE	SIERRA SAFETY CO	5

Addresses removed for confidentiality reasons

Source: PRIDE Industries Transportation, GIS Workshop, 2007

Figure 4-3



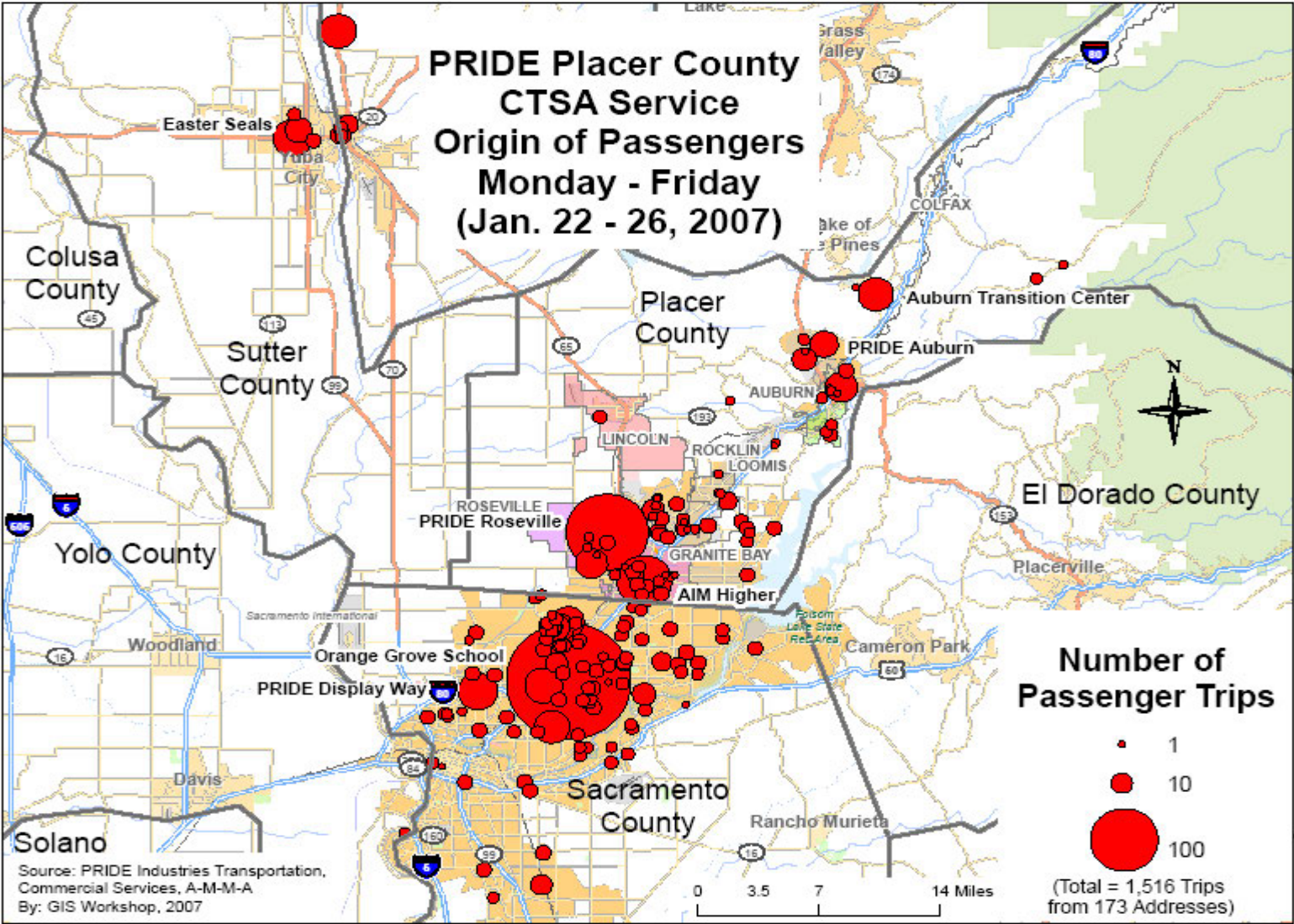
**Table 4-3, PRIDE Placer County
CTSA Medi-Cal Service
Top Origin Locations
Monday - Friday
January 22- 26, 2007**

Rank	Address	ZIP	City	Description of Address	Number of Trips Originating From This Location
1		95660	NORTH HIGHLANDS	PRIDE SACRAMENTO	19
2		95841	NORTH HIGHLANDS	ORANGE GROVE SCHOOL	11
3		95610	CITRUS HEIGHTS		8
4		95650	LOOMIS	NEW LIFE CENTER	7
5		95747	ROSEVILLE		5
6		95661	ROSEVILLE		5
7		95648	LINCOLN		5
8			LOOMIS		5
9		95658	NEWCASTLE		4
10		95648	LINCOLN		4

*Addresses removed for
confidentiality reasons.*

Source: PRIDE Industries Transportation, GIS Workshop, 2006

Figure 4-4



**Table 4-4 PRIDE Placer County CTSA
General CTSA Trips
Top Origin Locations
Monday - Friday
January 22- 26, 2007**

Rank	Address	ZIP	City	Description of Address	Number of Trips Originating From This Location
1	Addresses removed for confidentiality reasons.	95841	NORTH HIGHLANDS	ORANGE GROVE SCHOOL	343
2		95747	ROSEVILLE	PRIDE ROSEVILLE	149
3		95661	ROSEVILLE	AIM HIGHER	66
4		95993	YUBA CITY	EASTER SEALS	34
5		95603	SACRAMENTO	PRIDE DISPLAY WY	34
6		95660			31
7		95901	MARYSVILLE		29
8		95722	MEADOW VISTA	AUBURN TRANSITION CENTER	28
9		95864	SACRAMENTO	ST MARKS SHORT CENTER	28
10		95747	ROSEVILLE		23
11		95842	SACRAMENTO		23
12			AUBURN		23
13		95660	NORTH HIGHLANDS		19
14		95660	NORTH HIGHLANDS		18
15		95602	AUBURN	PRIDE AUBURN	17
16		95993	YUBA CITY		15
17		95603	AUBURN	VISUAL / LIVING SKILL CENTER	13
18		95660	NORTH HIGHLANDS		13
19		95628	FAIR OAKS		12
20		95765	ROCKLIN		11
21		95828	ELK GROVE		10
22		95660	NORTH HIGHLANDS		10
23			BEALE AFB	BEALE AFB CONTRAILS INN	9
24		95628	FAIR OAKS		9
25		95901	MARYSVILLE	YUBA COUNTY GOV'T CENTER	9
26		95650	LOOMIS	NEW LIFE CENTER	8
27		95677	ROCKLIN		7
28		95677	ROCKLIN	SIERRA COLLEGE	6
29		95662	ORANGEVALE		6
30		95678	ROSEVILLE		6

Source: PRIDE Industries Transportation, GIS Workshop, 2006

Linked Trips, Trip Origins and Destinations by Service Type

The origin analysis did not provide sufficient information to understand the pattern of trips as a trip might originate in South Placer County and then travel to a destination in Sacramento County. The consultant team worked with the Access database to establish linked trips within the Trapeze data.¹³ These trips are depicted on the maps following in relation to only the cities of origin and destination. This provides a picture of the actual trip making activity, depicted:

- for CTSA contract dial-a-ride services in Figure 4-5;
- for CTSA medical services in Figure 4-6; and
- for CTSA general trips in Figure 4-7.

¹³ Pride's Trapeze data set establishes two records for each one-way passenger trip: the trip origin is one record and the destination address is stored in a second record. To create linked trips, programming was necessary to link the unique client i.d. numbers associated with each trip and develop an output that could be used in the GIS analysis.

Figure 4-5

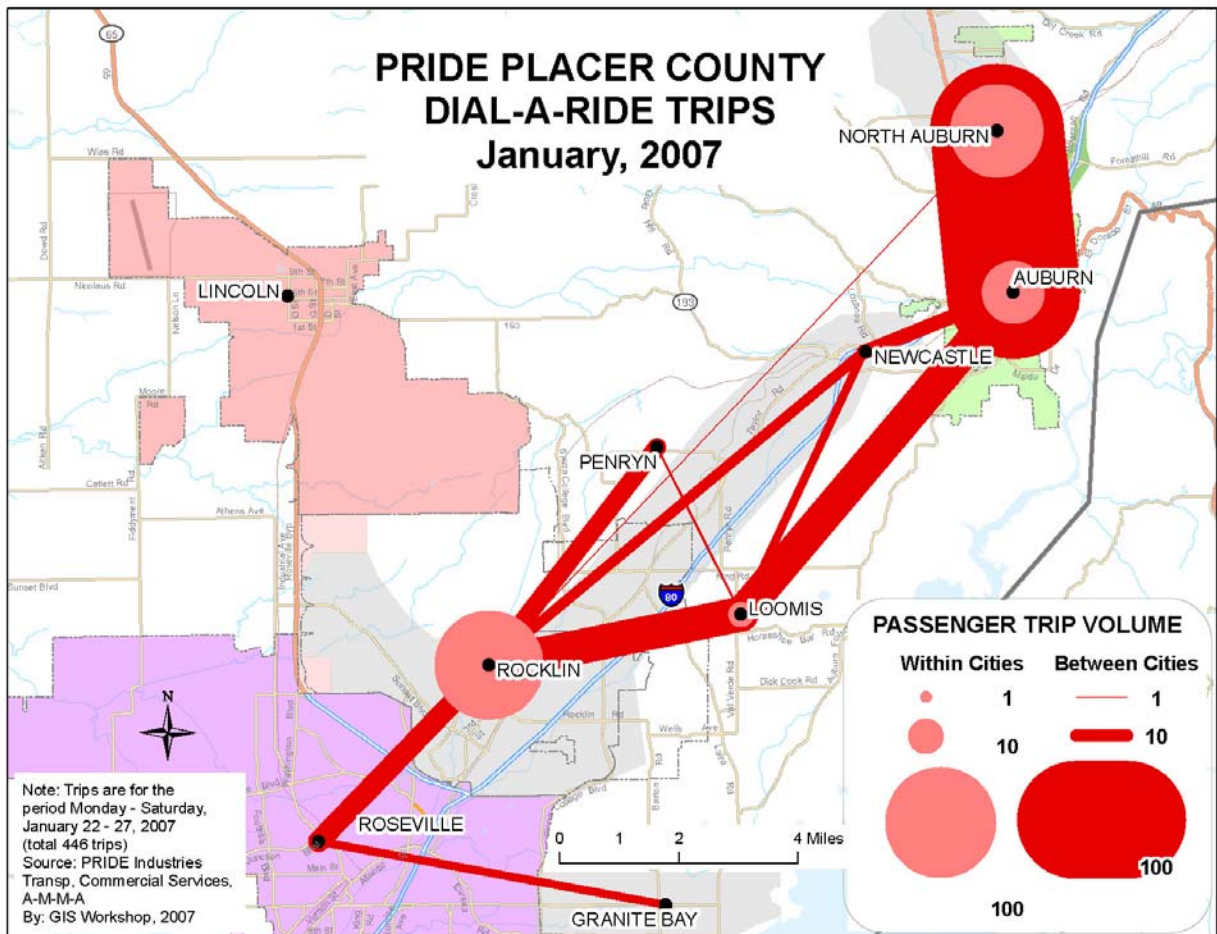


Figure 4-5 reveals that Placer County Transit (PCT) trips are very much reflective of PCT’s contractual understanding with Pride CTSA. Trips are provided within and between the communities of Auburn, of Rocklin and Loomis, between Auburn and Roseville, and between Granite Bay and Roseville. The circle and lines on Figure 4-5 present the relative volume of trips within this 446 trip sample from January 2007.

Figure 4-6 following depicts the pattern of trips labeled by the CTSA as Medical trips. This is a much smaller sample, a total of just 84 trips provided during this sample week. Trips are originating in South Placer County and traveling to various facilities in Sacramento County, in the North Highlands, Foothill Farms and Citrus Heights areas.

Figure 4-7 following shows a very different picture for all of the CTSA general trips, those trips that are not labeled as PCT contract trips or Medical trips. Table 4-4 details the volume of trips within South Placer County and between Placer and the neighboring counties. This detail shows that:

- 49% of this sample of trips originate within and end within South Placer County
- 7% originate within South Placer County and end outside of South Placer County
- 41% both originate and end outside of South Placer County

Figure 4-6

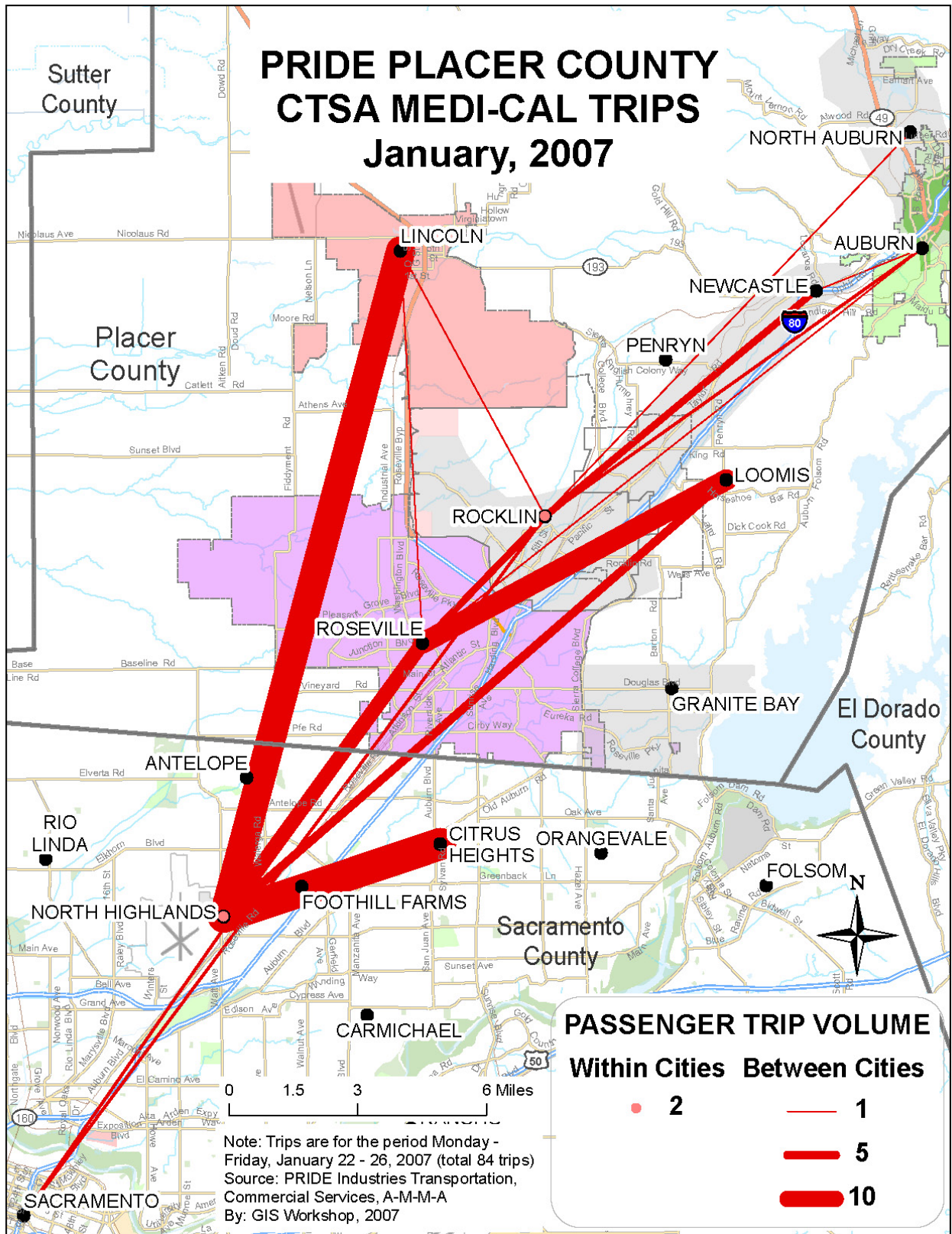


Figure 4-7

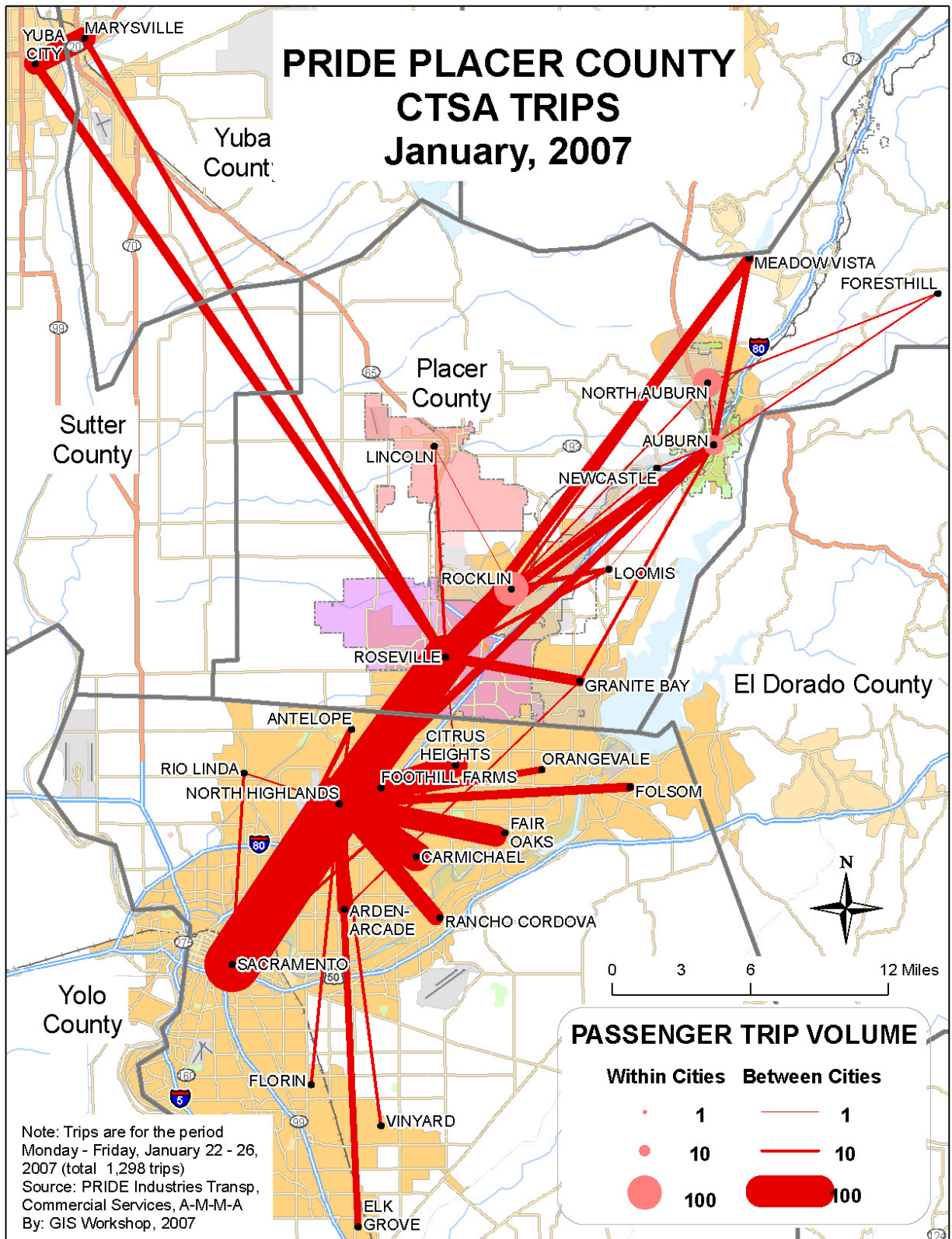


Table 4-5 Detail on PRIDE CTSA Trip Origins and Destinations from January 2007 Sample

PRIDE CTSA Only Trips, Sample			Drop Off Area													
Pickup Area	Trips	Pickup % of Total	Auburn/ North Placer Co.		City of Roseville		Rocklin/ Loomis/Granite Bay		City of Lincoln		North Sacramento County		South Sacramento County		Yuba / Marysville	
			n	%	n	%	n	%	n	%	n	%	n	%	n	%
Auburn/Placer North Co.	371	18.1%	302	14.7%	28	1.4%	41	2.0%								
City of Roseville	307	14.9%	25	1.2%	69	3.4%	86	4.2%	5	0.2%	74	3.6%	23	1.1%	23	1.1%
Rocklin/Loomis/ Granite B.	321	15.7%	60	2.9%	90	4.4%	154	7.5%	1	0.0%	10	0.5%	6	0.3%		
City of Lincoln	14	0.7%			4	0.2%	1	0.0%			9	0.4%				
North Sacramento County	645	31.5%			74	3.6%	10	0.5%	9	0.4%	326	15.9%	226	11.0%		
South Sacramento County	290	14.2%			25	1.2%	5	0.2%			221	10.8%	39	1.9%		
Yuba/Marysville	101	4.9%			24	1.2%									77	3.8%
Total Trips (n)	2049	100%														
Dropoff % of Total Trips		100%	18.9%		15.3%		14.5%		0.7%		31.2%		14.3%		4.9%	
Trips Originating and Ending in Placer County									49.4%							
Trips Originating in Placer and Ending Outside of Placer County									7.1%							
Trips Originating and Ending Outside of Placer County									43.4%							
<i>Note: All percentages are of the Total "N" = 2049</i>									100%							

Summary Comments Regarding PRIDE CTSA Trip Analysis

This analysis showed the origin location of three CTSA services, working with a sample of almost 2,200 trips provided during the last week of January 2007. The services are the PCT contract service, the CTSA medical or medically-oriented trips and general CTSA Dial-A-Ride trips provided in this region. The trip origin analysis showed that all of the PCT Dial-A-Ride passengers are being picked-up from sites located within South Placer County, and specifically within the respective service areas of the PCT contract.

For the other CTSA services, a significant number of medical and general CTSA passengers are originating from sites outside of this service area. Many of these passengers are coming from sites as far away as North Sacramento County, particularly in the area of the Orange Grove School.

The linked trips analysis made this clearer, specifically for the general CTSA trips. Half of those trips are within and between South Placer County addresses. Seven percent are from South Placer County addresses to locations outside of the County while up to 43 percent are to and from destinations that are outside of South Placer County, in Sutter, Yuba and Sacramento Counties.

These pictures indicate that where the contracting expectations are spelled out and delineated, the CTSA is following those requirements explicitly. In the case of general CTSA services, there has been no such clarity about expectations. The consequence of this are shown clearly in Table 4-4 which suggests that TDA funding that underwrites the CTSA operations is subsidizing trips to non-Placer County residents, outside of South Placer County.

4.10 SUMMARY COMMENTS ON SOUTH PLACER COUNTY PUBLIC DIAL-A-RIDE SERVICES

A picture emerges of a fairly comprehensive set of demand responsive services within South Placer County with eight programs reviewed. These range in size from Lincoln Transit, as the smallest to larger programs in Roseville and Placer County Transit. Auburn Transit's deviated fixed-route, as well as the Taylor Road Shuttle are not dial-a-ride services but are providing scheduled service within their respective areas that can still provide curb-to-curb service with requests for deviation to riders' homes or destinations. The *consolidated transportation services agency* - CTSA) operated by Pride Industries is filling certain gaps within the picture of municipal and county-operated services.

Fairly high levels of service are represented, on all weekdays and Saturdays in most areas and Roseville Dial-A-Ride operating on Sundays. In addition, consumers can request door-to-door assistance from several services, including Lincoln Dial-a-Ride and the CTSA. This is important for the most frail passengers or for riders who are visually impaired.

With the exception of CTSA services, the programs examined are all general public dial-a-ride programs, offering trips to almost all callers when space allows. The Roseville Dial-A-Ride has the most formalized Americans with Disabilities (ADA) program in place and gives priority to ADA riders. Sometimes general public riders do have to be bumped to make room for the ADA priority rider. PCT has been careful to ensure that its services meet the ADA complementary paratransit requirements but ridership is not limited to ADA riders.

Among these dial-a-ride programs, there are differences in fares, in operating hours, and in methods and timing for making reservations which can be confusing to consumers. Notably one rider interviewed on the “ride alongs” spoke of how to make the services work in an interconnected way, to transfer between cities, but she said “you have to know how to do this yourself.” This picture of the services suggests that the wealth of trip opportunities that are possible are not readily apparent to South Placer County residents.

The major policy issue this analysis presents is that of the general CTSA trips, now provided through Pride Industries of which up to 43 percent of the sample reviewed are originating and ending outside of South Placer County. The recent audit process identifies some operational concerns related to reporting and general record keeping. But the overall analysis suggests opportunity to revisit the expectations CTSA services for South Placer County, to articulate clearly both the expectations and the limitations on CTSA trips. Such clarification will ensure that Transportation Development Act funding that underwrites the CTSA services provided in South Placer County is spent in ways consistent with PCTPA’s policy direction.



SENIORS ON THE MOVE

Project-End Report

Prepared for:



Metro

Chip Hazen
ADA Compliance Officer
Los Angeles County Metropolitan Transportation Authority

Prepared by:



In Conjunction with:

ELLEN BLACKMAN CONSULTING SERVICES

August 2011

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SENIORS ON THE MOVE PROGRAM (FISCAL YEARS 2008-2011)

INTRODUCTION

Los Angeles County Metro has supported a travel training program for Los Angeles County's older adults since 2003. The program was initially driven by a concern that older adults need to know that they have alternatives to driving in order to avoid isolation and remain active in their communities after they reduce or stop their driving. This need was emphasized, shortly before the first Seniors on the MOVE program, by the July 2003 tragic loss of life in the Santa Monica farmers' market, the consequence of an older driver's accident. The program also recognized that navigating the public transportation programs of Los Angeles County could be daunting to some older persons, many of whom had not ridden public transit buses in decades, if at all. The program served an additional important role of introducing older adults to alternatives to more expensive paratransit services..

The recent June 2011 report "**Aging in Place, Stuck Without Options: Fixing the Mobility Crisis Threatening the Baby Boomer Generation**" prepared for *Transportation For America* examined senior mobility needs across the nation. It identified 11.5 million American's 65 and older with "poor" transit access in 2000 and an estimated 15.5 million older Americans who by 2015 will have equally "poor" transit access. Notably, Los Angeles County was **not** among the large metropolitan areas identified in this assessment, a tribute to local investment in public transportation beginning with the 1980 voter approval of Proposition A, Los Angeles County's first transportation sales tax measure.

The U.S. 2010 census documents Los Angeles County's older population at just over 1 million persons age 65 and older, with 14% of these age 85 and older. Importantly, the California Dept. of Finance projects growth of Los Angeles County seniors of up to 2.5 million persons by 2050, of whom almost 30% will be age 85 and older. The last of the baby boomers turn 65 in 2030. Planning for such growth, with its attendant implications, points to the continued importance of systematically introducing older persons in Los Angeles County to available public transportation. This report describes Seniors on the MOVE outcomes over these past two and a half years and offers direction and recommendation for future year initiatives.

Exhibit 1

Seniors on the MOVE 2008-2011 Workshop Participants Summary	ALL WORKSHOPS TOTALS (18 Workshops)	
<i>Attendance</i>		
Participants	966	
Currently Driving	383	40%
Rode with Others	57	6%
Using Public Transit	199	21%
Participated Using Mobility Device	23	2%
<i>Computer Access</i>		
Using Internet	242	25%
Required Interpretation	157	16%

WHO WE REACHED

Over a two and a half year period, beginning April of 2009, eighteen (18) Seniors on the MOVE workshops were held across Los Angeles County. These workshops were distributed across the five supervisorial districts and trained nearly 1,000 older adults. At the outset of each presentation, participants self-reported by raising their hands on particular key mobility characteristics. Of the total group responding, 966 older adults, **40% (383 individuals) reported currently driving** at the time of their participation and **6% (57 individuals) were driven by others** to arrive at the workshop location. Importantly, almost one in five, or **21% (199 individuals) reported currently using public transportation**. Among other characteristics of program participants, 2% used mobility devices, 25% reported currently using the internet and with computer access, and 16% used simultaneous interpretation at presentations. (Exhibit 1)

HOW ARE SENIORS USING TRANSIT?

We assessed participants' experiences with transit before and after the training through two survey questionnaires: one, the post workshop evaluation, was conducted on-site immediately following the workshop, and the second, a post-post survey, was mailed to participants four weeks after the workshop. Nearly 20% of participants completed on-site post evaluations. Results varied greatly by site, depending upon the characteristics of the local community and audience's willingness to stay until the end of the three-hour program and to complete evaluations. The lessons learned section of this report enumerates some of these issues, including further identifying strategies to maintain an engaged audience throughout a travel training presentation.

Post evaluations, summarized in Exhibit 2, indicated that of the 193 responding individuals, nearly half (46%) were currently using some public transit and almost one quarter (22%) were currently using Access, Los Angeles County's ADA mandated paratransit service.

Exhibit 2

Seniors on the MOVE Evaluations Totals from 18 Workshops (2008 - 2010)			
Post Workshop Evaluations (on site)			
Total Post Evaluations Completed			193
<i>How many times per week do you currently ride public transit?</i>			
	<i>n=</i>		193
None	102		53%
1 - 3	45		23%
4 - 6	16		8%
7 - 10	12		6%
More than 10	17		9%
<i>How many times per week do you currently ride Access or Paratransit?</i>			
	<i>n=</i>		189
None	147		78%
1 - 3	20		11%
4 - 6	17		9%
7 - 10	2		1%
More than 10	5		3%
<i>Do you plan to use transit more after this program?</i>			
	<i>n=</i>		191
Yes, I am sure	97		51%
Yes, probably	65		34%
No	4		2%
Not sure	25		13%
<i>Overall, how helpful was today's program?</i>			
	<i>n=</i>		186
Very helpful	132		71%
Somewhat helpful	30		16%
Helpful	17		9%
Not very helpful	5		3%
Not at all helpful	2		1%
<i>Would a travel buddy - some one to ride with you the first time - help you to use transit more?</i>			
	<i>n=</i>		187
Yes, tell me more	49		26%
Yes, possibly	48		26%
No	76		41%
Not Sure	14		7%

Exhibit 3

Post-Post Evaluations of 18 SOM Workshops (one month following workshop)			
Total Post-Post Evaluations Mailed		650	
Total Post-Post Evaluations Received		162	
<i>How many times have you used public transit in the pst month?</i>			
	<i>n=</i>		162
None	45		28%
1 - 3	51		31%
4 - 6	17		10%
7 - 10	13		8%
More than 10	36		22%
<i>Is this number more, less or the same as before the workshop?</i>			
	<i>n=</i>		157
More	72		46%
Less	11		7%
The same	74		47%
<i>Are there reasons why you have not used transit more?</i>			
	<i>n=</i>		157
Still drive	81		52%
Need more information	23		15%
Safety concerns	12		8%
Other	47		30%
<small>Note: Data for some workshops unavailable due to limited timing to spend evaluations at end of the year or inability to collect address/post-surveys due workshop set-up or participants' willingness.</small>			

Of greatest interest, 53% reported that they were not using public transit at all, suggesting that this audience was primarily interested in preparing for a time when they limited their driving. More than half of respondents reported interest in the Travel Buddy program—learning to use public transit with a peer volunteer travel trainer.

Exhibit 3 reports on the 162 post-post evaluations mailed back by program participants, summarizing individual’s self-reported transit usage since the workshop. Encouragingly, 71% reported at least some transit usage, with 46% of those responding reporting this as more than pre-workshop. Still driving was reported to be the most likely reason for not using transit more, with 52% of respondents citing this.

WHAT WE LEARNED

The experience of delivering eighteen programs over the course of several years brought back lessons in several key areas, including the use of a participant incentive and program content. These "lessons learned" are detailed below.

What Invited Participation

- **TAP Card as Incentive** An important part of the Seniors on the MOVE program has been the distribution of one free monthly pass/TAP card to encourage participants to try transit at no cost, subsequent to the workshop. This has had both advantages and disadvantages, especially with Metro’s switch from paper passes to TAP cards. Its main advantage is as an incentive for seniors to participate, and to try out public transit. One disadvantage has been that there have always been people who are regular transit users who come only for one month’s free transit and have limited interest in the program as a whole.



- **Timing of TAP Card Distribution** During the program’s first five years (before our involvement), Metro paper senior passes could be distributed at the end of the program, serving as one

incentive for participants to remain. AMMA Transit Planning's involvement in the program began at the same time that Metro was switching to TAP cards. The process of inputting TAP application data and preparing TAP cards turned out to be too cumbersome to do at the time of Seniors on the MOVE programs. Therefore the applications were completed at the program, photos taken, and then provided to Metro for preparation and distribution of TAP cards within two weeks of the program.

- **Communications around TAP Cards** There were glitches around temporary TAP cards. Evidently, in order get TAP cards to participants by the beginning of a month, Metro began sending temporary cards, without names, to senior centers for distribution. While in theory this was a good idea, without advance notification nobody kept a list of names of TAP-applicants from each center, so distribution of the temporary cards, which were loaded for one free month, was not a smooth process.
- **Lunch as Incentive** Another incentive at many of the presentations was a lunch program offered by the senior center and used to encourage participation. However, this incentive did not exist at centers where a lunch program wasn't offered. Presentations where lunch followed were often better attended through the end of the workshop.

What Content Was Important

- **Seniors' Concerns about Public Transit Safety** The PowerPoint and handouts did not initially have a specific section on safety and security while using transit. After the first few programs, with safety and security consistently leading the questions raised, we added safety/security tips to the presentation and a one-page handout with suggestions and reminders. These additions clearly addressed concerns expressed by numerous seniors using transit or considering using transit.



- **Trip Planning Focus** The program's presentation of trip-planning initially focused on the details of using Metro's trip-planner to find a trip. While this provided guidance to seniors, it was not the best use of time. Therefore, during FY 2010, we modified the trip-planning discussion to focus on general aspects of trip-planning (information needed, getting trip-planning information by phone and/or computer, etc.). This was a more efficient use of time and, possibly, more effective as it pointed new consumers to tools they could use to answer their specific questions. At the same time, we expanded the examples of transit-trips possible from a local area from one page to two pages, giving participants additional localized transit information to go to a wider range of possible destinations.

- **Workshop Administration** During the time we worked on the program, we changed how we worked with senior centers around participant sign-ups. The final FY 2009 program had 12 participants meeting in a small room. While this promoted an informal discussion, it was not the best use of resources. While most centers attracted good attendance, two types of problems developed.
1. Some centers had such a small number of sign-ups that we realized it was necessary to identify the need for a minimum number of sign-ups early in the planning process, as part of a discussion of responsibilities and expectations. One program was postponed and another cancelled when very few people signed up. Replacement programs in the same areas had better attendance.
 2. Secondly, some centers provided inaccurate estimates of participation, including language-needs. At one center, the staff contact did not take into account likely attendance by persons, including many Spanish-speaking persons, who were regularly at the center. This was the only center where attendance was significantly higher than the center's estimate.

WHAT WE DID

The program and handouts, developed and refined through experience, encouraged use of public transit among older adults who may still be driving at least some of the time or who were unfamiliar with using transit. The program also attracted and provided information to older adults already using transit.



The program's focus and topics remained consistent during the past three years, though with some modifications and adaptations. Six key areas comprised its basic elements:

1. Safe driving for seniors Every Seniors on the MOVE program included seniors who are still driving, at least sometimes. Therefore the program included a short presentation on safe driving for seniors. For two years the senior driving presentation was given by a public affairs officer with the California Highway Patrol, using a standard CHP PowerPoint presentation. During the last year of the project, the presentation was given by a Senior Driver Ombudsman with the Department of Motor Vehicles. The DMV participation was more helpful, both because its presenter was more adaptable and because participants commented that they found it helpful to know of an office within the DMV which could provide guidance to older drivers.
2. Fixed route and paratransit systems serving the local area; each program's content was very much localized to the particular transit services, including routes, stops and key destinations of

the neighborhoods and communities surrounding the host senior center. Localized handouts provided contact and fare information for these local transit and paratransit systems and, during the last fiscal year, a local section of the bus and rail system map showing transit lines in the area surrounding the host center.

3. Destinations accessible using public transit Senior centers provided some suggestions about places local seniors would be interested in knowing how to travel to, and the program included a short discussion of using transit to travel to those places of interest, both nearby and farther away.
4. Using public transit This discussion was introduced with a short video produced by Metro several years ago: *Seniors Day Out*. Participants found the video entertaining and informative, and it gave an overview of the topics discussed in the main part of the program. The video is followed by discussions of different aspects of using transit: obtaining information including trip-planning and reading schedules, the steps involved in locating bus stops and buses, boarding and leaving a bus, and paying the fare using TAP cards, and safety tips.
5. Field trip The program included a short field trip on a special Metro bus usually to a nearby Metro Rail station. This provided an opportunity for seniors who had not been on a transit bus in many years, if ever, to familiarize themselves with a modern bus, hear comments from the bus operator on riding a bus, and learn how to use a ticket vending machine. New vehicles and friendly drivers were selected to assist with the Seniors on the MOVE field trips.
6. Final comments and evaluations Participants were urged to complete evaluation forms at the end of the program, to indicate their current means of getting around and to report on whether or not they found the program helpful. As noted, a follow-up evaluation was sent approximately one month later to learn of participants' follow-up experiences with transit.

HOW WE REACHED SENIORS

At the start of AMMA's responsibility for Seniors on the MOVE, we surveyed interest of all Los Angeles County seniors centers and other agencies serving older adults and received positive response postcards from 48 agencies. The 18 Seniors on the MOVE programs drew from this database, plus additional agencies who contacted Metro directly. While the postcard response we received from senior centers and other agencies was a large number, there was uneven distribution of



interest among the five supervisorial districts; the largest numbers of interested centers were in districts 1 and 5 (East LA, San Gabriel Valley, and nearby areas).

Senior centers used different methods of outreach to older adults in their communities, and focused on different aspects of the program. At two centers, outreach and coordination were done through a senior club associated with the center; these centers had well-attended programs. In one city, the program was held at the senior center but coordination and much outreach were led by the transportation manager, with information available at both the senior center and on the city's transit and paratransit vehicles. This also worked out very well in terms of attendance as well as involvement by local transit.



Some senior center outreach focused on TAP cards. While this attracted transit riders, it had the disadvantage of bringing participants whose sole focus was on getting a free TAP card. Sometimes these individuals caused disruptions, with their exclusive interest in the part of the room used for TAP-applications and photos.

LOOKING TO THE FUTURE

The summary information drawn from the post-post evaluations suggests that 46% of those responding were using public transit more than they had prior to the workshop. It is difficult to know to what degree this can be generalized to the almost 1000 individuals who participated in eighteen Seniors on the MOVE workshops reported on here. Hopefully a significant proportion, although only modest

"The workshop gave me ideas for when I can't drive. Thank you."

-Norwalk Participant

numbers of participants reported their experiences through the post-post evaluation. Importantly though, 85% of those surveyed immediately following a workshop indicated that they planned to use transit.

Clearly, at every Seniors on the MOVE program, there was a mix of current transit users and non-users. In some cases transit users were interested in sharing their knowledge of local transit. The presence of these knowledgeable individuals suggests both the potential and the value of developing volunteers at local senior centers to work with their peers to provide information and assistance in using transit.

Interest in traveling with a peer, a buddy-rider, to continue increasing older persons' familiarity and comfort with using public transit was indicated by half of participants who completed evaluations. In narrative comments, several individuals expressed interest in one-on-one or small group trips with a trainer. Others suggested that Metro continue this program to provide follow-up orientations both to reinforce and update the information presented. Clearly, there is a role for Metro around travel

"My ride to LA was enjoyable and easy to do—we did this on the train using the TAP card. Thank you."

-Arcadia Participant

orientation and training to continuously introduce public transit to older adults who are often very unfamiliar with the transit services. These individuals can be shown that transit can meet their needs for both local and regional trips. Adding a component for trips with another older adult, a travel buddy, can enhance the impact of this ongoing travel training.



Some senior centers are already using senior volunteers in various ways to provide information and guidance on local transit. For example, the Culver City Senior Center has a volunteer who regularly provides transit information and assistance to other seniors at the senior center. And the senior club at the Griffith Park Center had already organized a public transit corner in the senior center, prior to the Seniors on the *MOVE* presentation.

Participant evaluations – currently based on voluntary evaluation-returns—provided the information we have on use of transit, and the impact of the Seniors on the *MOVE* program. More reliable information could be developed by tracking TAP-card use by participants, an idea which was raised during initial planning meetings but was determined to be not possible in terms of Metro policies. Seniors at the workshops and in the on-site post workshop evaluations often reported both surprise and positive response to the public transportation services to which they were introduced. The evaluations and comments suggest that Seniors on the *MOVE* is effectively reaching its target audience—seniors who are still driving but may become transit dependent—and encouraging them to get on board a bus or train.

"Thank you for the TAP card. It was fun to use and I had two friends go to North Hollywood with me and everything was so clean on the Metro train."

-West Los Angeles Participant

In narrative comments received from the post-post evaluations, many participants identified bus trips they took with friends using their TAP card, suggesting that we reached both trainees and a broader group. Several individuals noted that having the TAP card provided through Seniors on the *MOVE* made these initial transit trips possible. Clearly, this investment by Metro in travel training of older adults has played, and will continue to play, an important role in encouraging experimentation with public transit.

"Thank you. I love it [transit]. I don't have to worry about driving."

-El Monte Participant