

Spokane Transit Authority
1230 West Boone Avenue
Spokane, WA 99201-2686
(509) 325-6000

PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

Wednesday, February 3, 2016, 1:30 p.m.
Spokane Transit Southside Conference Room

DRAFT AGENDA

Estimated meeting time: 90 minutes

1. Call to Order and Roll Call
2. Public Expressions
3. Committee Chair Report *(5 minutes)*
4. Committee Action *(10 minutes)*
 - A. Approval of Minutes of the December 2, 2015, Committee meeting – *Corrections/Approval*
 - B. Approval of Scope of Work for Mobility Training, Volunteer Mobility Mentor Coordination, and Services to Conduct ADA Eligibility In-Person Assessments *(Blaska)*
5. **Reports to Committee** *(25 minutes)*
 - A. Fare Analysis *(Warren/Blaska)*
 - B. Preparation for Fixed Route Fleet Replacement Program - Summary *(Blaska)*
 - C. High Performance Transit (HPT) Facility Design and Service Communications Standards Update *(Otterstrom)*
6. **Committee Action** *(30 minutes)*
 - A. Board Consent Agenda
 1. Request for Special 2016 Community Events Fare Structure for Valleyfest *(Bousley/Blaska)*
 2. 2016 Communications Plan *(Bousley)*
 - B. Board Discussion Agenda
 1. Fare Analysis Public Outreach Plan - Overview *(Bousley)*
7. CEO Report *(10 minutes)*
8. Committee Information – *no discussion/staff available for questions*
 - A. January 2016 Sales Tax Revenue Information *(Warren)*
 - B. November 2015 Operating Indicators *(Blaska)*
 - C. December 2015 Operating Indicators *(Blaska)*
 - D. Fourth Quarter 2015 Safety and Loss Summary Report *(Doolittle)*
 - E. Fourth Quarter 2015 Service Planning Public Input Report *(Otterstrom)*
 - F. Community Outreach and Involvement *(Bousley)*
 - G. 2016 Citizen Advisory Committee Meeting Dates *(Bousley)*
9. March 2016 Committee Packet Agenda Review
10. New Business *(5 minutes)*
11. Committee Members' Expressions *(5 minutes)*
12. Adjourn
13. Next Committee Meeting: March 2, 2016, 1:30 p.m.
(STA Southside Conference Room, 1230 West Boone Avenue, Spokane, Washington)

Agendas of regular Committee and Board meetings are available the Friday afternoon preceding each meeting at the STA Administrative Office, 1230 West Boone Avenue, Spokane, Washington. Discussions concerning matters to be brought to the Board are held in Committee meetings. The public is welcome to attend and participate.

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SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 2: PUBLIC EXPRESSIONS

REFERRAL COMMITTEE: N/A

SUBMITTED BY: N/A

SUMMARY:

At this time, the Performance Monitoring and External Relations Committee will give the public an opportunity to express comments or opinions.

Anyone wishing to speak should sign in on the sheet provided and indicate the subject of interest.

RECOMMENDATION TO COMMITTEE: N/A

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 3: **COMMITTEE CHAIR REPORT**

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Amber Waldref, Chair, Performance Monitoring and External Relations

SUMMARY: At this time, the Committee Chair will have an opportunity to comment on various topics of interest regarding Spokane Transit.

RECOMMENDATION TO COMMITTEE: N/A

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 4A : **MINUTES OF THE DECEMBER 2, 2015, PERFORMANCE
MONITORING AND EXTERNAL RELATIONS COMMITTEE
MEETING – CORRECTIONS OR APPROVAL**

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Jeanette Van Dort, Executive Assistant

SUMMARY: Minutes of the meeting are attached for corrections or approval.

RECOMMENDATION TO COMMITTEE: Corrections or approval.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

Spokane Transit Authority
1230 West Boone Avenue
Spokane, Washington 99201-2686
(509) 325-6000

PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE

Draft Minutes of the December 2, 2015, Meeting
Southside Conference Room

MEMBERS PRESENT

Amber Waldref, City of Spokane *
Chuck Hafner, City of Spokane Valley**
Steve Peterson, City of Liberty Lake
Rhonda Bowers, Labor Representative
E. Susan Meyer, CEO (Ex-Officio)

MEMBERS ABSENT

Steve Lawrence, City of Airway Heights
John Higgins, City of Medical Lake (Ex-Officio)

* Chair

STAFF PRESENT

Steve Blaska, Director of Operations
Karl Otterstrom, Director of Planning
Lynda Warren, Director of Finance & Information Systems
Beth Bousley, Director of Communications & Customer Svc.
Steve Doolittle, Director of Human Resources
Susan Millbank, Community Ombudsman &
Accessibility Officer
Mark Curtis, Manager, Customer Service & The Plaza
Don Reimer, Manager, Maintenance & Facilities
Charlie Phillips, Maintenance Analyst
Brandon Rapez-Betty, Sr. Communications Specialist

GUESTS

None

1. **CALL TO ORDER AND ROLL CALL**

Chair Waldref called the meeting to order at 1:32 p.m. Introductions were made.

Mayor Peterson arrived at 1:33 p.m.

2. **PUBLIC EXPRESSIONS**

None.

3. **COMMITTEE CHAIR REPORT**

None.

4. **COMMITTEE APPROVAL**

A. **MINUTES OF THE OCTOBER 7, 2015, COMMITTEE MEETING**

Mr. Hafner moved to recommend approval of the October 7, 2015, Committee meeting minutes. The motion was seconded by Mr. Peterson and passed unanimously.

B. **MINUTES OF THE NOVEMBER 4, 2015, COMMITTEE MEETING**

Mr. Hafner moved to recommend approval of the November 4, 2015, Committee meeting minutes. The motion was seconded by Mr. Peterson and passed unanimously.

C. **CAC CHARTER UPDATE AND RESOLUTION**

Ms. Bousley explained that in November 2015, the STA Board of Directors approved the repeal of Resolution No. 654-09 regarding the Board Standing Committee and directed the Performance Monitoring and External Relations Committee (PM&ER) to formulate a Citizen Advisory Committee (CAC) under Resolution No. 738-15.

The CAC has recommended changes in its composition, membership selection process, length of member term, and scope of work to better reflect its desired interaction and alignment with the PM&ER Committee. To accomplish this alignment, the PM&ER Committee needs to adopt a resolution formulating the CAC as an advisory committee, approve the CAC Charter, and appoint current members to the CAC in its new alignment.

Ms. Bousley noted that final copies of the Charter, with revisions made earlier in the day by STA's attorney to better clarify the relationship between the CAC and the PM&ER Committee, were distributed at the start of the meeting. She reviewed those revisions with the committee members. Discussion ensued regarding

Article V – *Membership Selection Process*, Paragraph 2, and Ms. Waldref recommended adding information regarding having a good geographic representation on the Board. Mr. Hafner recommended specifically naming those cities that composed the STA boundaries. Mr. Peterson recommended waiving the residency requirement, because some consistent users of STA might live in Idaho and catch the bus at the Liberty Lake Park & Ride facility. Ms. Bousley commented that many vanpool users come from outlying areas, also. Ms. Waldref said that a reference to having a good geographic representation would cover it all.

Ms. Waldref recommended adding “We strive to have a good geographic representation” to the end of the second paragraph of Article V. The Committee agreed to this addition.

Mr. Hafner moved, with the aforementioned addition to Article V, to 1.) approve a revised CAC Charter reflecting a change to the Citizen Advisory Committee’s composition and duties, and 2.) adopt a resolution formulating the CAC as an advisory committee to the Performance Monitoring and External Relations Committee. The motion was seconded by Mr. Peterson and passed unanimously.

5. COMMITTEE ACTION

A. Board Consent Agenda

1. AWARD OF CONTRACT FOR PLAZA ELEVATOR RENOVATION

Ms. Bousley explained that STA hired HKA Elevator Consulting, Inc., to provide a comprehensive maintenance and condition audit of the Plaza elevators. The control system of the elevators is now 21 years old and the life expectancy is 2 – 3 more years. Recommendations included replacement of the open loop door operators and related components with new solid slate closed loop door operators and related components; replacement of the controller, power unit, and signal fixtures with new solid state controllers, with emergency lowering, new submersible power unit, oil coolers, and new fixtures; and installation of hydraulic isolation couplings for a quieter operation.

A bid opening was scheduled for November 30th, but due to the area devastation following the wind storm on November 17th, contractors bidding on this project requested additional time to prepare their bids. Staff anticipated having a recommendation for an award of contract at the December 2nd Committee meeting, but because a delay would interfere with the larger Plaza renovation project, an exception to the procurement policy was requested which would allow the CEO to award the contract up to \$300,000.

Mr. Hafner moved to recommend that the STA Board authorize an exception to the procurement policy and allow the CEO to approve an award of contract up to \$300,000 for the renovation of two elevators at the STA Plaza. The motion was seconded by Mr. Peterson and passed unanimously.

Ms. Waldref asked if there was any information regarding the re-bid on the full Plaza renovation. Mr. Otterstrom gave the Committee a brief update, noting that an award of contract is anticipated by March 2016.

2. DRAFT 2016 PERFORMANCE MEASURES

Mr. Blaska explained that STA’s performance measures are related to specific STA priorities and that these quantifiable benchmarks demonstrate the agency’s commitment to accountability. These are reevaluated annually. Ridership goals reflect those set forth in the annual Strategic Plan:

- Fixed Route: 1.5% growth. Lower gas prices contributed to an approximate 4% decrease in ridership from the 2014 record. The 2016 goal will be to partially recover some of that lost ridership, which is aggressive considering that there is no funding for service increases in 2016.
- Paratransit: Sustain current level of ridership. The continued success of Mobility Training, In-Person Assessments, and the Van Grant Program are expected to continue to control demand for this service.

- Vanpool: 7% growth. Lower gas prices had a negative effect in Vanpool which contributed to an approximate 10% decrease in ridership from 2014. The goal in 2016 is to reverse that trend and achieve 7% growth over where STA ends 2015.

Mr. Blaska added that there were also minor changes to the Fixed Route maintenance cost goal and to the Paratransit/Vanpool maintenance cost goal.

Mr. Peterson moved to recommend the Board approve the 2016 Performance Measures as presented. The motion was seconded by Mr. Hafner and passed unanimously.

3. APPROVAL OF 2016 STATE LEGISLATIVE PRIORITIES

Ms. Millbank explained that each year STA's Board of Directors adopts the State Legislative focus and priorities to guide the CEO during the legislative session and beyond. The 2016 session begins on January 11th and is scheduled to last 60 days. During the session, staff will watch for any legislation that may pose a threat or offer new opportunities to Spokane Transit.

Current state investments in public transportation include:

- Special Needs grant for Paratransit (approx. \$2.25M for 2015-2017, projected to increase in future biennia due to *Connection Washington*)
- *Connecting Washington* - \$15M programmed for the Central City Line
- Vanpool grant - STA awarded ten vans in 2015-2017 (expansion, possibly replacement)
- Regional Mobility grants: West Plains Transit Center (\$1.7M in 2015-2017 and programmed for \$6.69M in 2017-2019), and the Central City Line (\$1.95M in 2015-2017)
- Streamlined sales and use tax mitigation (approx. \$370K in the 2015-2017 biennium)

Ms. Millbank said that legislation affecting STA's cost of operations and/or service on the street may come forward at any time; therefore, the CEO requests authority from the Board to determine STA's interest on specific pieces of legislation, convey those interests to legislators and others, and report to the Performance Monitoring and External Relations Committee and the Board during the legislative session. Brief discussion ensued.

Mr. Hafner moved to recommend the Board approve the 2016 State Legislative Focus and Priorities as presented and grant authority to the CEO to determine STA's interest on specific pieces of legislation, convey those interests to legislators and others, and report to the Performance Monitoring and External Relations Committee and the Board during the legislative session. The motion was seconded by Ms. Waldref and passed unanimously.

Ms. Waldref recommended that this item be placed on the Board discussion agenda rather than the consent agenda.

B. Board Discussion Agenda

(No items were presented this month.)

6. COMMITTEE REPORTS

A. FARE ANALYSIS - TIMELINE

Ms. Warren explained that STA evaluates its fares on a periodic basis. The last major review of its fare structure was conducted in 2009, resulting in fare changes in 2010, 2011, and 2012. As part of the process, public outreach is conducted to ensure stakeholder participation and adherence to Title VI (federal) requirements. Ms. Warren reviewed the fare analysis timeline, noting that a proposal for the public outreach plan will be presented to the Committee and the Board in February 2016. A final recommendation for Board decision is anticipated in July 2016. If approved, actual fare changes wouldn't take effect until July 2017. Discussion ensued.

B. PREPARATION FOR FIXED ROUTE FLEET REPLACEMENT PROGRAM – PART 3 – DELIVERY TIMELINE

Mr. Blaska reminded Committee members that over the past few months, staff has provided information and received input from the Committee on STA's fixed route coach replacement strategy. He said that

current programming for fleet replacement is based on the delivery of replacement coaches as vehicles in the current fleet reach 15 years old. Four procurement scenarios were reviewed:

- Scenario 1: Replace vehicles on a 15 year anniversary date. This replacement scenario results in a varying number of vehicle purchases each year of the fleet replacement cycle. In order to finance this requirement, some funding needs to be set aside during years where there are relatively few vehicles purchased in order to have funding available for years where greater numbers of vehicles will be purchased. This is the base scenario used for financial projections.
- Scenario 2: Balance current fleet replacement to average 13 vehicles purchased per year. This scenario normalizes the peaks and valleys of vehicle purchases over the same time frame as Scenario 1. Some vehicles are replaced prior to their 15 year mark.
- Scenario 3: Balance the current fleet replacement strategy to a 12-year cycle. This scenario would normalize peaks and valleys of vehicle purchases to approximately 11 vehicles per year. This cycle would continue on an ongoing basis with vehicles being replaced every 12 years.
- Scenario 4: Balance the current fleet replacement to implement a 15-year cycle. This scenario has STA to begin purchasing approximately 9 vehicles per year in order to normalize peaks and valleys. This would extend the timeline it takes to complete the current fleet replacement and many current vehicles would exceed their 15 year life before they are replaced.

Mr. Blaska reviewed the pros and cons of each option. He said that assessment of these choices leads to the conclusion that managing the fleet replacement based on the optimum lifecycle of the individual vehicles is the most prudent strategy. It provides for flexibility over the next five years, is fully funded through the Transit Development Plan, and optimizes the value of the capital and maintenance investment of each individual vehicle. Discussion ensued.

Ms. Waldref left the meeting at 2:59 p.m. She asked Mr. Hafner to Chair the remainder of the meeting.

7. CEO REPORT

- A. Ms. Meyer said the U.S. Congressional House and Senate Conference Committees agreed on a five year transportation authorization bill called FAST – “Fixing America’s Surface Transportation.” They are planning to request Congressional approval and the President’s signature by the end of the week. The plan will bring back dependable funding for which STA can complete.
- B. Ms. Meyer congratulated Mr. Blaska and Fixed Route staff and coach operators on their excellent performance during wind storm. STA partnered with the City of Spokane and the Emergency Operations Center to ensure service delivery went as smoothly as possible.
- C. Ms. Meyer commented that Free Fare Day ridership was slightly less than in 2014; however, STA did receive extensive media coverage for the event.
- D. Ms. Meyer said that volunteers are in the process of “knitting a sweater” for a bus. Blankets will be crocheted or knitted to fit over a bus for display on First Night, and afterward they will be donated to shelters for the homeless in this area.

8. COMMITTEE INFORMATION

- A. October 2015 Financial Results Summary – *as presented.*
- B. November 2015 Sales Tax Revenue Information – *as presented.*
- C. October 2015 Operating Indicators – *as presented.*
- D. Community Outreach and Involvement – *as presented.*
- E. STA’s Holiday Services and Office Hours – *as presented.*
- F. Central City Line - Update – *as presented.*

9. FEBRUARY 2016 COMMITTEE PACKET AGENDA REVIEW

Acting Chair Hafner asked if there were any comments about the draft agenda for the next Committee meeting. None were forthcoming.

Ms. Meyer reminded the Committee that there will be no meeting in January.

10. NEW BUSINESS

None.

11. COMMITTEE MEMBERS' EXPRESSIONS

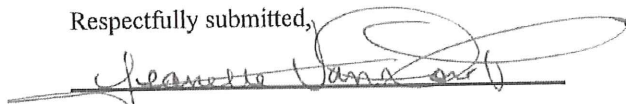
Mr. Peterson asked if the new signage at STA Park and Ride lots would allow passengers to get information regarding where buses are and when they are due to arrive. Mr. Otterstrom said that signage installation would be prioritized by those locations with highest ridership, but eventually all major stop locations would have the new signage with that information.

12. ADJOURN

Acting Chair Hafner adjourned the meeting at 3:15 p.m.

13. NEXT MEETING – WEDNESDAY, FEBRUARY 3, 2016, 1:30 P.M., STA SOUTHSIDE CONFERENCE ROOM, 1230 WEST BOONE AVENUE

Respectfully submitted,



Jeanette Van Dort, Executive Assistant

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 4B : APPROVAL OF SCOPE OF WORK FOR MOBILITY TRAINING, VOLUNTEER MOBILITY MENTOR COORDINATION, AND SERVICES TO CONDUCT ADA ELIGIBILITY IN-PERSON ASSESSMENTS,

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Steve Blaska, Director of Operations
Denise Marchioro, Paratransit Manager
Patty Talbott, Paratransit Contract Manager

SUMMARY: Spokane Transit Authority has funded mobility training since 2005 with successful results. A new Request for Proposals (RFP) is needed to continue providing this community service. Mobility training is designed to assist seniors and disabled persons who are able to be trained to use the fixed route bus system rather than Paratransit services some or all of the time. Mobility training is a service that is commonly offered to a community by transit agencies. STA's mobility training program goals include:

- Contract for services for a mobility training program coordinator to collaborate with the community and social service providers to identify needs and obtain training referrals.
- Promote independent travel among individuals who are seniors and/or disabled.
- Provide cost savings to STA by reducing demand for costly door-to-door transportation.
- Provide a valuable service to the community.

The 2016 annual budget for the Mobility Training contract is \$275,440 for three full time trainers and ½ Program Manager. During the last 4 years of this contract, STA has saved \$2,652,333 by enabling customers to use Fixed Route rather than Paratransit.

Also included in the Scope of Work is service to provide Paratransit ADA eligibility in-person assessments (IPA's). IPA's are a tool to aid Paratransit staff in making more individualized and accurate Paratransit eligibility determinations as well as to better control the high costs of Paratransit. This function was implemented in October 2012. The IPA function is delivered with an FTE staff person and is integrated with mobility training staff resources.

Lastly the scope of work includes a Volunteer Mobility Mentor Coordination service. STA was recently awarded \$366,393 in FTA section 5310 funding (for two years) with an 80/20 local match to implement this program.

In addition to reviewing the scope of work, staff requests a Committee member to assist in the evaluation of the proposals submitted.

RECOMMENDATION TO COMMITTEE: Review and approve the Scope of Work for contracted mobility training services, and Volunteer Mobility Mentor Coordination, and Paratransit ADA eligibility in person assessments, services. Staff also requests a Committee member to assist in the evaluation of the proposals submitted.

COMMITTEE ACTION:

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

III. DETAILED SPECIFICATIONS – MOBILITY TRAINING (TRAVEL TRAINING)

A. PURPOSE

Spokane Transit is seeking proposals for a contract service provider to act as Spokane Transit's mobility training coordinator and community liaison to identify and train individuals with disabilities and older individuals to use the fixed route bus system to extend outreach efforts with public schools, service agencies, and care providers to identify and refer customers to mobility training; to develop, implement and monitor the trainee training; and "Train the Trainer" program for mobility training staff. The program is designed and delivered in collaboration with a variety of community and social service agencies. There will be no charge for customers to participate in mobility training service and participation will be strictly voluntary.

The Contractor will also perform Pathway Reviews for customers who have the conditional eligibility (BARRIER). The assessor will go to the location where the barrier exists and assess the barrier from the home to the stop and from the stop to the home to confirm/deny that the barrier exists.

B. BACKGROUND

Spokane Transit desires to continue to operate an education program, referred to as Mobility Training, which provides customers with fixed route bus training. The Mobility Training focuses on, but is not limited to, older individuals and/or people with disabilities who are able to use fixed route buses some or all of the time. Customers are identified through the Paratransit eligibility process, care provider requests, transition/vocational trainer referrals, customer inquiry/referral and staff referrals and outreach efforts. STA included Pathway Reviews in the Mobility Training program as the assessment skills of the Mobility Trainer coincide with those of needed for Pathway Review.

C. SCOPE OF SERVICES FOR MOBILITY TRAINING SERVICES

The Contractor will act as Spokane Transit's liaison with service agencies, schools, vocational trainer, and group homes/families. They will provide outreach services, identify, refer, and train customers for mobility training, participate in "Train the Trainer" opportunities and provide group and individual training activities. The Contractor should identify and use already existing resources in the community whenever possible, or sub-contract to qualified agencies or individuals for additional needed or specialized training services.

Mobility Training

The Mobility Training program consists of five (5) components:

1. **Instruction** – basic orientation to the mechanics of the bus system, fare structure, reading a schedule, calling a Customer Service Representative for a trip plan, internet, telephone - Interactive Voice Response (IVR) system, and one-on-one training to plan for specific trips.
2. **Group Orientation** - basic orientation to the mechanics of the fixed route bus system, fare structure, reading a schedule, and calling a Customer Service Representative for a trip plan in a group setting. A group is defined as five (5) or more individuals.
3. **Community Outreach Efforts**- Mobility training staff are required to participate in community events and meetings in order to promote the program and to recruit participants. Additionally, mobility training staff are required to visit service agencies for the purpose of promoting the program.
4. **Mobility Training** – teaches customers to use the fixed route accessible features including the use of ramps and kneeling features.

5. **Destination Training** – a customer is trained, or retrained, to travel to specific destinations gaining the knowledge to use the fixed route system for some or all of their travel needs. There are two levels:
 - a. **Basic training** - which is generally less than 10 hours in duration (excluding all documentation time); and
 - b. **Intensive training** - which is generally less than 30 total hours in duration (excluding all documentation). Any deviation from the 10 hour for basic and 30 hour intensive training time limit must be pre-authorized in writing by Spokane Transit Paratransit Transportation Manager, or designee.

The preceding destination trainings will include some or all of the following:

1. In-person interview to determine skills and abilities and to develop training plan.
2. How to read and use system maps and schedules.
3. How to access and use the Spokane Transit website to obtain information.
4. How to use the IVR system.
5. How to decide which fare instrument to use (cash, 2 hour passes, pass, and smart cards).
6. How to pay the fare.
7. How and when to ask for a transfer.
8. How to access Pass by Mail and how to use the internet to purchase passes.
9. How to obtain a reduced fare identification card, including use of the Paratransit ID card as a reduced identification card, if applicable.
10. How to plan a trip, including the use of 328-RIDE.
11. If the customer has access to a computer, plan a trip using STA's Website and/or the internet.
12. How to use Real Time Trip/Bus Information.
13. Landmark identifications.
14. Crossing streets safely and other safety related issues.
15. How to know when to get off the bus.
- (a) How to let the bus driver know you want off the bus or need assistance.
16. Emergency procedures.
17. Stranger awareness.
18. A review of Spokane Transit's Rules of Conduct.
19. Appropriate trip planning as it relates to time and schedules.
20. Hands on experience using ramps and kneeling features.
21. Accessible site trip reviews.
22. How to effectively use the services available at The Plaza.
23. How to access security staff services.
24. How to file a formal compliment/complaint.

See **EXHIBIT O** for the current STA's Mobility Training Process.

Mobility Training Customers

The Mobility Training Program will train a variety of customers including:

1. Customers referred as part of a Paratransit eligibility assessment.

2. Customers who have conditional Paratransit eligibilities who may use the fixed route bus system some of the time.
3. Customers who use Paratransit for a repeated trip (3-5 days a week) and who are capable, with training, to use the fixed route bus for this repeated trip.
4. Customers who need training getting on and off a bus with a mobility aid.
5. Customers who have been denied Paratransit services who seek information about and training on the fixed route system.
6. Customers who are eligible for Paratransit but who are outside the Paratransit service area. In this case, the Mobility Trainer will assist the customer in finding other transportation options and community resources.
7. Groups who request bus orientation and familiarization services.
8. Individuals who may lose fixed route service to their residence or destinations.
9. Individuals attending special event activities.
10. Others who request the service.
11. Persons referred by Spokane Transit's Ombudsman as part of the Paratransit Appeals Process and for other unique situations that may arise.

Pathway Review

The Contractor will work with STA personnel to develop a list of customers who have recently had the conditional eligibility of "BARRIER" assigned. STA will identify the barrier location and the Contractor will provide the staffing to go out to the location and assess whether a barrier exists to and from the bus stop and report back to STA.

The Contractor reviews the following locations from the customer's home:

Origin to Bus Stop/Transfers/Bus Stop at Destination. When looking at those locations the Contractor will assess the following:

1. Distance
2. Incline/Decline
3. Curb Cuts
4. Sidewalks
5. Uneven Terrain
6. Stop has Bench or Shelter
7. There is obstruction (vegetation/walls/fascia)
8. Cross Walks
9. Signal Lights
10. Street Congestion
11. Line of Site

Currently, on average, there are two (2) Pathway Reviews completed per month, traveling 4.75 miles and taking 5.5 hours to complete each.

See **EXHIBIT L** for Path of Travel Assessment Form

D. GOALS AND OBJECTIVES-MOBILITY TRAINING

The Contractor will be required to successfully complete the following training goals and objectives:

	Contract ½ Year July 1, 2016 to Dec 31, 2016	Contract Year 1 Jan 2017 to Dec 2017	Contract Year 2 Jan 2018 to Dec 2018	Contract Year 3 Jan 2019 to Dec 2019	Contract Year 4 Jan 2020 to Dec 2020	Contract Year 5 Jan 2021 to Dec 2021
Basic Level Trainings (Successfully certified)	35	70	70	70	70	70
Intensive Level Trainings (Successfully certified)	68	136	136	136	136	136
Group Trainings	15	30	30	30	30	30
Community Out-reaches	42	85	85	85	85	85
Mobility Aid Trainings/Appeals	As needed	As Needed	As Needed	As Needed	As Needed	As Needed

All goals are subject to change due to severe weather conditions, staffing changes or other unique situations that may impact the service provider's ability to complete trainings. The adjustment of goals will be requested by the service provider in writing and approved by the Paratransit Contract Manager, in writing.

Definitions for Mobility Training Elements:

Basic Level Training - Destination training which is generally less than 10 hours in duration (excluding all final report documentation time).

Intensive Level Training - Destination training which generally less than 30 hours in total duration (excluding all final report documentation time).

Successfully Certified - The trainee has completed Destination training (Basic or Intensive) when he or she can travel to and from the destination safely and independently. The service provider will summarize in the final report whether the training is successful. Spokane Transit reserves the right to review and confirm success.

Group Training - Basic orientation to the mechanics of using the fixed route system including the use ramps with a mobility device. Group training will consist of five (5) or more persons.

Community Outreaches - Introductions and explanation of the Mobility Training program with the aim to generate referrals to training. These may consist of (but not limited to) attendance at fairs, community events, agency/association phone calls, In-Person meetings and presentations.

See **EXHIBIT Q** for a 3-year summary of Mobility Training history.

E. CONTRACTOR REQUIREMENTS--MOBILITY TRAINING

1. Work with Spokane Transit's Communications Department to develop and assemble informational handouts for outreach presentations and marketing, including an evaluation to gauge presentation effectiveness.
2. Initiate contact, and collaboration with service agencies and schools at onset of the contract and continuing throughout the contract life.
3. Develop, coordinate, and maintain database of service organization contacts, referrals, and customer listings and establish procedures for referrals and follow ups.
4. Generate all required mobility training program elements including all forms, logs, charts, letters, assessments and final written reports with approval from Spokane Transit personnel.
5. Respect each customer's privacy and all privacy and confidentiality laws in the delivery of services.
6. Identify and train customers to use fixed route system for some or all travel needs; evaluate customer's ability to travel independently.
7. Identify, evaluate, and refer customers to Spokane Transit's Mobility training program.
8. Provide "Train the Trainer" instruction as needed to Mobility Training staff to ensure consistency and continued professional development.
9. Provide written final report of findings to Spokane Transit of all assessments associated with the mobility training process completed in the month with the invoice for that month.
10. Provide monthly reports and documentation to include:
 - a. Activity log including daily activity and time spent conducting individual trainings or participating in "Train the Trainer" sessions or administrative time.
 - b. Number of customers trained successfully (as demonstrated by the customer's ability to travel independently) and a list of those customers whose training was not successful, with notation as to why it was unsuccessful.
 - c. Written evaluation of each customer at varying stages of training.
 - d. On-going written evaluation of each customer or group including point of referral, initial assessment of need, all contacts with customer/care provider, modifications to plan, and final outcome.
11. Provide confidential written survey to participant upon completion of training (**EXHIBIT B**).
12. Updated contact and referral list.
13. Respond in timely manner to contacts and training referrals (within ten (10) working days).
14. Complete and forward detailed monthly invoices within ten (10) working days after the end of each month.
15. Provide a cell phone detailed report and monthly bill for each staff person assigned to the project.
16. Complete all required individual/legal guardian approvals to train participants in the basic and intensive destination training program.
17. Meet training goals and objectives as set forth in Section 3.4.

18. Administer and manage an ongoing Quality Assurance Program. The elements of which must include: review of accuracy of data entry; consistency of In-Person Assessment recommendations and documentation; accuracy and consistency of Mobility Training final summaries, and accuracy and consistency of Mobility Mentor final training reports.
19. Complete and provide documentation of completed Washington state and federal criminal background checks for all persons associated with the delivery of mobility training services. The criminal background checks must be completed prior to participation in "Train the Trainer" professional development.
20. Budget for and participate in appropriate new staff professional development opportunities, continuing education, conferences, and travel cost associated with training.
21. Program manager is required to participate in National Transit Institute's (NTI) Comprehensive ADA Eligibility workshop within the first 6 months of contract award at Contractor expenses. Any replacement program manager must also complete the training within 6 months of hire. NTI's website for course listing is www.ntionline.com
22. Documentation is critical to demonstrate the success of the Mobility Training program and to reducing the liability of an agency providing mobility training. The following shall be included in each participant's file and shall be available for review by Spokane Transit staff at any time:

a. Referral forms

List the participant's full name, address, and phone number(s), including an emergency contact name and phone numbers.

b. Assessment

The assessment is designed to specify the level of skill that the client has in areas related to using fixed route service. This will show essential skills to be reviewed and provide a basis for designing an individualized training plan for the participant. The training plan should focus on strengthening skills that are weak and utilizing the stronger skills to build confidence in the participant as he/she learns to use fixed route service.

c. Trip plan

Information on former transportation or training will help in planning a training program. The information on a possible destination is important to provide a preliminary screening of the route. If the participant is too far from a route or uses a wheelchair or scooter and cannot access the destination he/she wants by fixed route service, coordination with Paratransit will be necessary.

Document the route the participant is trained on initially. If the participant is developmentally disabled, there may be only one route he/she uses on a daily basis. The parents and day program staff should have a copy of the route and scheduled times in case the participant is missing at a future date.

d. Daily client activity

A daily log shall be used to record the progress of the participant to assure all skills are being addressed in training. If any skills are not performed independently at the end of training, an explanation of this should be included in the final summary. Depending on the skills that are not independently performed, the training may be considered unsuccessful. In some cases, a specific compensation may override the independence of the skill. Any of the above should be explained in the summary.

e. Summary/Final report

This report should include detailed information regarding specific incidents in training, areas of special attention, what was taught for emergencies, etc. This report should state the final status of the participant as to whether he/she has acquired the skills to use the fixed route service independently or if there are stipulations as to his/her abilities to use the bus. This report should detail any reason and/or recommendation when the trainer believes the participant is not able to use the fixed route system independently.

These documents are intended to record the various aspects of the training and its compliance with the Mobility Training program. In combination with each other, the reports should give a detailed picture of the training, including the interactions of the trainer and the trainee.

F. SPOKANE TRANSIT REQUIREMENTS--MOBILITY TRAINING

1. Use the current available technology tools and data that will support a pro-active travel and innovative training program.
2. Share pertinent customer and ridership related information with the Contractor in order to more accurately assess skills and potential skills development.
3. Provide a one (1) month complimentary bus pass for individuals who successfully complete the Basic bus training program. (These are not provided to individuals retrained within twelve months.)
4. Provide three (3) consecutive months of complimentary bus passes for individuals who successfully complete the Intensive bus training program. (These are not provided to individuals retrained within twelve months.)
5. Provide monthly passes for all actively working mobility training contracted staff.
6. Provide leadership and guidance to Contractor in the development of mobility training program elements and goals and objectives.
7. Provide for office space, supplies, office equipment including telephones and fax machines, up to three laptop computers, printer, and up to internet access cell phones.
8. Make every effort to make referrals that will support success of the training program.
9. Monitor the effectiveness of the mobility training by conducting phone surveys, audits, analysis, and observations.
10. Meet with program manager on a regular and on-going basis to ensure open communication and collaboration.
11. Provide all marketing tools, materials and promotional items; i.e. brochures, handouts, business cards.
12. Reimburse registration costs for appropriate outreach events.
13. Equal Access to Service - All costs associated with a customer's request for an accommodation such as a sign language interpreter or language interpreter will be arranged and paid for by Spokane Transit, separate and apart from the Contractor's pricing. Contact Spokane Transit's Community Ombudsman for assistance with alternate format requests.
14. Finalize and compile monthly progress reports from data received from the Contractor.

EXHIBIT C

G. STAFF- MOBILITY TRAINING

On-Site Project Manager-Responsibilities & Qualifications

The Project Manager shall be competent to oversee and deliver mobility training and make determinations of functional and/cognitive abilities in compliance with Spokane Transit's requirements as outlined in this RFP.

The Project manager must meet or exceed these minimum qualifications:

1. An associate or bachelors degree.
2. Three (3) years of supervisory experience, including three (3) years' experience working with individuals with disabilities or related experience.
3. Completion of, or will complete, a National Transit Institute course or workshop related to Travel Training (at the Contractor's expense).
4. Knowledge of physical/occupational/recreational therapy principles is desired.
5. Certified, or will be certified within six months of startup or hire, in First Aid/CPR. (at the Contractor's expense.)
6. Experience and knowledge of mobility training principles and assessment techniques.
7. A clean criminal background check.

The Project Manager shall create and maintain a supportive work environment that employs and retains highly qualified and motivated employees. The Project Manager must have demonstrated skills in motivating staff, team building, communication, and training. To maintain quality and compliance, the Project Manager should be competent in all aspects of mobility training methodologies, processes, and procedures. The Project Manager is expected to have the ability to perform the work in the area they supervise and to possess a level of expertise that makes them a resource for employees.

The Project Manager must be able to clearly and accurately develop and administer assessments, documents, work performance-tracking systems, evaluate employee performance, and analyze and evaluate work processes. The Project Manager must be able to develop, document, communicate, and administer operating procedures.

The Project Manager is responsible for employee conduct and performance. Supervision of the personnel involved in the mobility training process, as outlined in this RFP, and employed by the Contractor shall be vested in the Contractor. The Contractor shall take appropriate action whenever there is a pattern of complaints against an employee.

In addition, the Project Manager shall be responsible for:

1. Scheduling staff to conduct assessments/training.
2. Supervising all trainers and clerical staff.
3. Arranging for the training and assignment of back-up personnel.
4. Initial and ongoing training of all contracted staff.
5. Maintaining complete documentation of all training programs and staff attendance.
6. Ensuring Contractor compliance with the RFP.
7. Preparing reports as required by Spokane Transit including weekly and monthly statistical reports and annual summary reports.
8. Preparing monthly invoices documenting all charges.
9. Day-to-day operation of the assessment course area and mobility training services.

10. Completing an ongoing Quality Assurance Program
11. Immediately informing Spokane Transit staff regarding any operations problems or emergencies.
12. Personally attending regular and ongoing meetings with Spokane Transit Manager and/or STA eligibility staff related to Mobility Training referrals.
13. Maintaining ethical and professional boundaries between clients and customers.
14. Treating customers, clients, passengers and partners with dignity and respect while promoting courteous and polite customer service and ensuring employees do the same.

The Project Manager shall work closely with Spokane Transit's Transportation Manager-Paratransit and Vanpool, administrative and eligibility staff to meet the goals of the process.

Note: The Project Manager may be assigned the duties and responsibilities of the in-person assessment management, volunteer mobility mentor coordination and mobility training functions on a time allocation basis determined by the proposer. This is dependent on what and how many programs the proposer opts for.

Mobility Trainer—Responsibilities & Qualifications

The Mobility Trainer must meet or exceed these minimum qualifications:

1. Two (2) years' experience working with individuals with disabilities.
2. Excellent interaction and sensitivity awareness in order to work with people with various disabilities.
3. Excellent organizational and documentation skills.
4. Excellent written and oral communication skills.
5. Knowledge of mobility training principles and procedures is highly desired.
6. Effective problem solving skills.
7. Certified (or will be within 6 months of startup or hire) in First Aid/CPR.
8. Be knowledgeable of Fixed Route bus system and schedule and City of Spokane and surrounding areas.
9. A clean criminal background check.

The Mobility Trainer will be responsible for:

1. Responding to mobility training requests for services.
2. Conducting in-person evaluations prior to commencement of training in the field.
3. Complete and report on Path of Travel assessments in a timely manner.
4. Scheduling appointments and training sessions.
5. Delivering individualized one-on-one training for participants.
6. Completing all required documentation to record competencies.
7. Attending community events as needed to promote mobility training.
8. Maintaining safety awareness at all times.
9. Carrying a working cell phone.
10. Reporting any customer complaints.
11. Being aware, sensitive, and responsive to the needs of each mobility training participant.
12. Maintaining ethical and professional boundaries between clients and customers.
13. Treating customers, clients, passengers and partners with dignity and respect while promoting courteous and polite customer service.

Clerical Position (*estimated .25 FTE*) Responsibilities & Qualifications

The person filling the clerical position must meet the following minimum qualifications:

1. A minimum of one (1) year experience in a clerical position, with experience in writing and typing correspondence, filing, and answering multi-line phone systems.
2. Proficient in various computer software programs, including all Microsoft Office applications.
3. Experience working with persons with disabilities and elderly individuals.
4. Knowledge of Spokane Transit's fixed route bus system and schedules and Spokane Transit's Paratransit program.
5. A clean criminal background check.

Responsibilities will include:

1. Responding to all mobility training inquiries.
2. Assisting with scheduling functions.
3. Providing all typing, filing, and data entry assistance to project manager, mobility trainers, and Eligibility Specialist.
4. Greeting and directing mobility training participants In-Person and on the phone.
5. Tracking completion of all required documentation and assisting with the compiling of reports as specified.
6. Other duties as assigned.
7. Maintaining ethical and professional boundaries between clients and customers.
8. Treating customers, clients, passengers, and partners with dignity and respect while promoting courteous and polite customer service.

H. OFFICE SPACE-MOBILITY TRAINING

Spokane Transit has office space for the Mobility Training staff located at 701 W. Riverside Avenue, on the 2nd floor of Spokane Transit's downtown transfer center, the Plaza. This is the current location of Spokane Transit's Mobility Training program.

I. DETAILED SPECIFICATIONS--VOLUNTEER MOBILITY MENTOR COORDINATION

A. PURPOSE

STA is seeking contracted services to coordinate a volunteer mobility mentor program. This program is often referred to in the transit industry as a “Bus Buddy” program.

The coordination of the program will include:

- Recruiting, training and supporting volunteers from the community to assist and train seniors and persons with disabilities to use the fixed route bus system.
- Outreach in the community to recruit both mentors and their trainees. Seek relationships with agency and human services organizations to promote the program.
- Coordinating the training of the volunteer trainees with STA fixed route dispatch.
- Reporting of training progress and results.

B. BACKGROUND

As part of a Federal Grant, using 5310 funding, STA has developed a new program to use community volunteers to train and assist people with disabilities and seniors in using STA’s transportation system.

Currently, funding is available through December 2017. With the success of the Volunteer Mobility Mentor program, STA will seek to secure continued funding.

The volunteer mobility mentor program will provide various types of assistance for seniors and persons with disabilities in order to remove barriers and increase fixed route ridership. The assistance will include a travel club, group orientations, customer service and long term support, and some one-on-one orientations (as needed).

Scope of Services for the Volunteer Mobility Mentor Coordination Program

The Contractor will act as STA’s representative as with the various service agencies, facilities, and services that will provide both Mentors and trainees. They will identify, refer, and train mobility mentors from the community who will have the skills to teach others to ride the fixed route bus system.

1. Recruiting/Training Volunteer Mentors
2. Support Services to the Mentors
3. Coordinating between Mentors, Trainees and STA

C. GOALS AND OBJECTIVES

The Contractor will be required to recruit, train, and maintain a minimum of ten (10) active Mobility Mentors at any one time during each calendar year.

The Mobility Mentors will be required to train a minimum of 240 persons each year (this can be in group training, travel clubs, special event trips, and one-on-one training).

All goals are subject to change due to severe weather conditions, staffing changes, or other unique situations that may impact the Contractor's ability to recruit Mentors or complete trainings. The adjustment of the goals must be requested by the Contractor in writing and approved by the Paratransit Contract Manager.

D. CONTRACTOR REQUIREMENTS-- VOLUNTEER MOBILITY MENTOR COORDINATION

1. Work with STA's communications department to develop and assemble handouts for outreach presentations and marketing—for both recruitment of Mentors and for Mentors and Contractor Staff to use in gathering Trainings
2. Develop and maintain a recognition/incentive program for Volunteer Mentors
3. Develop and maintain a contact list among the areas agencies; schools, for recruiting and referral purposes.
4. Respect each customer's privacy and all privacy confidentiality laws in the delivery of service. Train the Mentors to do the same.
5. Evaluate the success of the Mentors in training persons to use the bus on an ongoing basis
6. Provide "Train the Trainer" instruction for Volunteer Mentors and Coordination staff.
7. Develop and Provide formats and training guidelines for the mobility mentors and tools to assist the mentors in training different segments of the community.
8. Develop and maintain a referral system for trainees for Mobility Training program for those individuals who need additional, more complete one on one training.
9. Provide monthly Reports and documentation to include:
 - a. Mentor Listings (Active, focus Area, Trainees/Events completed in the month (type of training/event (i.e. Travel Club, Orientation, One on One) and Year to date, Monthly Pass #)
 - b. List of Trainees; locations trained and dates trained.
 - c. List of how many free passes were provided to trainees
 - d. (Must be forwarded within ten (10) working days after the end of each month.)
10. Complete and forward detailed monthly invoices within ten (10) working days after the end of each month. Include a cellphone report and monthly bill for each staff person assigned to this project.
11. Provide Monthly Reporting for all Mentor trainings and Quarterly reporting for grant performance updates.
12. Coordinate with the mobility mentors that all required individual/legal guardian approvals to train participants.
13. Respond in a timely manner to contacts and training referrals (goal: within 10 working days).
14. Complete and provide documentation of completed Washington State and Federal criminal background checks for all person associated with the coordination of the voluntary mentors. (Must be provided initially upon startup/hire and then updated annually).
15. Volunteer Coordinator will be responsible for ensuring all Volunteer Mentors complete background check forms.
16. Budget for and participate in appropriate new staff professional development opportunities, continuing education, conferences and travel cost associated with such trainings and development.

E. STA REQUIREMENTS- VOLUNTEER MOBILITY MENTOR COORDINATION

1. Use the current available technology tools and data that will support a pro-active program.
2. Provide eight (8) complimentary single-use bus passes for individuals who attend a Mobility Mentor training sessions or events.
3. Provide Monthly Bus Passes for each active Mobility Mentor.
4. Provide monthly passes for all actively working mobility mentor coordination staff.
5. Provide leadership and guidance to Contractor in the development of Volunteer Mobility Mentor program elements and goals and objectives.
6. Provide for office space, supplies, office equipment including telephones and fax machines, up to three laptop computers, printer, and up to four internet access cell phones.
7. Make every effort to make referrals that will support success of the Mentor program.
8. Monitor the effectiveness of the Mentor program by conducting phone surveys, audits, analysis, and observations.
9. Meet with Program Manager and volunteer coordinator on a regular and on-going basis to ensure open communication and collaboration.
10. Provide all marketing tools, materials, and promotional items (i.e., brochures, handouts, business cards).
11. Reimburse registration costs for appropriate outreach events.
12. Equal Access to Service - All costs associated with a customer's request for an accommodation such as a sign language interpreter or language interpreter will be arranged and paid for by STA, separate and apart from the Contractor's pricing. Contact STA's Community Ombudsman for assistance with alternate format requests.
13. Finalize and compile monthly progress reports from data received from the Contractor.

F. STAFF--VOLUNTEER MOBILITY MENTOR COORDINATION

Mobility Mentor Coordinator-Responsibilities & Qualifications

The Mobility Mentor Coordinator must meet or exceed the following qualifications:

1. Two (2) years working with individuals with disabilities and/or seniors.
2. Excellent interaction and sensitivity awareness in order to work with persons with various disabilities.
3. Excellent organizational and documentation skills.
4. One (1) year Experience in Supervisory/Coordination position.
5. Excellent written and oral communications skills
6. Be knowledgeable of the STA Fixed Route bus system, the City of Spokane and its surrounding areas.
7. Have a clean background check.

The Mobility Mentor Coordinator will be responsible for:

1. Recruiting and maintaining all Mobility Mentors
2. Training Mobility Mentors
3. Managing and motivating the volunteer Mobility Mentors.

4. Scheduling and coordinating events for training with the Mobility Mentors.
5. Recognition and incentive program management for the Mentors.
6. Completing all required documentation and reports.
7. Reporting any customer complaints.
8. Being aware of and sensitive to the needs of each Mentor.
9. Act as a backup for training if a Mentor cancels a training with less than two days notices (as Participants cannot be notified).
10. Maintaining ethical and professional boundaries between clients and customers.
11. Treating customers, clients, passengers and partners with dignity and respect while promoting courteous and polite customer service.

G. OFFICE SPACE-VOLUNTEER MOBILITY MENTOR COORDINATION

This program will be collocated with the Mobility Training Program and the In-person Assessment Program at the Mobility Center in the STA Plaza along with STA's Eligibility Specialist. There is a lunch room that is shared with the other program personnel and STA's fixed route bus Operators and Customer Service Department.

The Mobility Mentor will have an office and share the conference room with the other programs and STA's Eligibility Specialist.

V. DETAILED SPECIFICATIONS--SERVICES TO CONDUCT ADA PARATRANSIT ELIGIBILITY IN-PERSON ASSESSMENTS

A. PURPOSE

STA is seeking contracted services to perform the following responsibilities:

- Interview Paratransit applicants in order to clarify information previously obtained in the Paratransit application (see **EXHIBIT D**) and obtain additional information in order to better understand the applicant's functional abilities (see **EXHIBIT E**):

Evaluate the physical and/or cognitive functional abilities of **new** or recertifying Paratransit applicants to help determine eligibility for Paratransit or ability to use the fixed route bus service for some or all public transportation trips.

- Compile information and submit written recommendations regarding ADA Paratransit eligibility (see **EXHIBIT F**).

B. BACKGROUND

Understanding of the STA Paratransit Eligibility Process and its association with the In-Person Assessment program.

- **General Information Americans with Disabilities Act (ADA) Requirements**

The ADA directs that transit agencies establish a process to determine Paratransit eligibility. The presence of a disabling condition alone does not qualify a person for Paratransit eligibility. Persons are eligible for Paratransit service if: 1) they have a disability; and 2) the disability prevents them from independently using STA's fixed route bus for some or all of their trips. The ADA states that each public entity required to provide complementary Paratransit service will establish a process that "shall strictly limit ADA Paratransit eligibility" to individuals who meet the criteria outlined in 49CFR, Part 37, Subpart F – *Paratransit as a Complement to Fixed Route Service*, Section 37.123 *ADA Paratransit Eligibility: Standards*. Under the ADA, the following individuals are eligible for Paratransit services:

Category 1

"Any individual with a disability who is unable, as the result of physical or mental impairment (including a visual impairment) and without the assistance of another individual (except the operator of a wheelchair or other boarding assistance device), to board, ride or disembark from any vehicle on the system which is readily accessible to and usable individuals with disabilities."

Category 2

"Any individual with a disability who needs the assistance of a wheelchair or other boarding assistance device and is able, with such assistance, to board, ride and disembark from any vehicle which is readily accessible to and usable by individuals with disabilities if the individual wants to travel on a route on the system during the hours of operation of the system at a time, or within a reasonable period of such time, when such a vehicle is not being used to provide designated public transportation on the route."

Category 3

"Any individual with a disability who has a specific impairment-related condition which prevents such individual from traveling to a boarding location or from a disembarking location on such system."

- **STA's Current Eligibility Process**

The goals of STA's eligibility process are to:

1. Confirm the applicant's disability;
2. Confirm if the disability is permanent or temporary;
3. Evaluate the applicant's functional ability to perform tasks required to use the fixed route system, some or all of the time; and
4. Match the applicant with the most appropriate mode of public transportation based on his or her functional abilities.

Tasks needed to use the fixed route service include the ability to independently:

1. Get to and from transit stops/Plaza;
2. Stand and wait or sit and wait at a stop;
3. Board and alight the bus;
4. Understand and remember how to use the service;
5. Find one's way and navigate the system independently; and
6. Use securement systems appropriately.

Other factors considered include:

1. The interaction of architectural barriers and environmental barriers with the functional abilities of the applicant; and
2. Functional abilities that may change from day to day or under specific circumstances (e.g., multiple sclerosis).

Application Process

The STA Paratransit department currently makes approximately 175 eligibility determinations per month from new/or recertifying applicants. All applicants are required to complete an application which includes a medical verification.

A portion of the applicants, approximately 50% go through the In-Person assessment (IPA) process. The others go through a "Non IPA" process, where STA's Eligibility Specialist reviews the application to make an eligibility determination.

STA also has a separate Contractor who provides professional medical verification, but to a great extent, relies on the information provided by the applicant/medical person to determine eligibility. The application includes a medical release form, and if additional information or clarification is needed because of inconsistencies on the application or to verify the information on the application, the applicant is contacted by phone and/or contact is made with STA's contracted health professional. The medical consultation Contractor will primarily to confirm a diagnosis of disability and will ascertain the functional limitations associated with the disability.

As allowed by the ADA, STA has established an average recertification period of three (3) years. Applicants may apply for recertification at the end of their eligibility period or at any time they believe that there has been a significant change in their functional abilities.

Under the ADA requirements, STA has a total of twenty-one (21) days after the application is complete, to make an eligibility determination.

See **EXHIBIT N** for STA's current New and Recertified Application Process.

C. ADA PARATRANSIT ELIGIBILITY IN-PERSON ASSESSMENT-SCOPE OF SERVICES

• In-Person Physical Functional Assessments

The Contractor will provide staff to conduct in-person physical functional assessments. The purpose of the assessment will be to determine a Paratransit applicant's ability to use STA's accessible fixed route bus system for all or some of the applicant's public transportation trips. All STA fixed routes and buses are accessible for people with disabilities.

The Contractor shall staff a sufficient number of positions for scheduling and conducting interview and functional assessments so that applicants are offered an assessment appointment within ten (10) calendar days from the date that the application is received from the Eligibility Specialist. The Contractor also is responsible to ensure that staff is trained to provide back-up support for each of the contracted positions.

All personnel assigned to the project shall be knowledgeable about the project and the ADA rules and guidance regarding public transportation. All staff shall respect the privacy of each applicant and demonstrate and maintain a professional and courteous attitude toward all individuals associated with the STA Paratransit program.

• Assessment Guidelines

ADA Paratransit eligibility is based on the applicant's most limiting condition, the combined effects of multiple disabilities, and/or limitations related to age. The Contractor is to evaluate an individual's functional abilities as they have been presented in the application in relation to the person's disability. If the evaluator suspects that the applicant has a disability that has not been previously identified, the evaluator will inform the Eligibility Specialist of the suspicion.

Assessment tools required to make the functional determination may include the following:

1. Review of application
2. An in-person interview (EXHIBIT G)
3. Tinetti Balance and Gait Tests (EXHIBIT H)
4. Mini-Mental Status Examination (MMSE) (EXHIBIT I)
5. Functional Assessment of Cognitive Transit Skills (FACTS)
6. Wheelchair/scooter weight and measurement
7. Customer's ability to maneuver in a wheelchair/scooter
8. Physical functional assessment/Transit skills assessment
9. Simulated bus trip in the community

D. GOALS AND OBJECTIVES IN-PERSON ASSESSMENT:

The In-Person Assessments as it applies to:

New/Recertifying Applicants

The STA Paratransit has an in-person interview and a functional assessment of physical, cognitive and/or visual abilities for approximately 50% of all applicants (New and Recertifications), when additional information is required in determining the appropriate mode of public transportation for the applicant.

Projected number of assessments required

Projected Interviews / Assessments	Contract ½ Year July 2015 to Dec 2016	Contract Year 1 Jan to Dec 2017*	Contract Year 2 Jan to Dec 2018*	Contract Year 3 Jan to Dec 2019*	Contract Year 4 Jan to Dec 2020*	Contract Year 5 Jan to Dec 2021*
50% (New Apps)	272	562	573	585	596	608
50% (Recertification)	291	609	621	633	646	659
Appeals and others	12	25	26	26	27	27
*2017 to 2021 Based upon an estimated 2% growth each year						

Note: Please note these projections are for planning purposes only. Due to various factors, these numbers change (increase or decrease) from year to year.

See **EXHIBIT P** for a 3 year history of In Person Assessments.

E. CONTRACTOR REQUIREMENTS --ADA PARATRANSIT ELIGIBILITY IN-PERSON ASSESSMENTS

1. Assessment Process

The in-person assessment process includes the following:

- a. Questions and answers regarding the individual's abilities;
- b. Limited noninvasive functional testing;
- c. Observation of an individual's abilities; and
- d. Knowledge of the affect disabilities and medications may have on the individual's ability to function.
 - 1) All sections on the evaluation form must be fully completed by the assessor. Notes on the form must be legible and detailed enough to convey a full and accurate picture of an applicant's functional abilities related to using accessible fixed route transit.
 - 2) The assessor shall indicate on the form if an applicant is unable to participate in the evaluation due to severe cognitive impairments.
 - 3) The assessor will ask follow-up questions appropriate to the circumstances of the applicant to clarify and fully understand and explore the individual applicant's abilities. All additional questions and the detailed answers shall be documented thoroughly on the evaluation form.
 - 4) The assessor will include notes regarding observations of an applicant's abilities on the form.

- 5) The assessor will make mobility related observations of applicants as they approach, depart and enter the assessment center. The assessor should note any changes in gait, pace, shortness of breath, or any other observations not consistent with observation during the evaluation.
- 6) If the functional assessment is not attempted, the assessor will record a detailed reason for why the functional assessment was not attempted. (For example-The applicant was fatigued by the walk to the mobility center.)
- 7) The assessor will make specific cognitive related observations of applicants based upon their conduct and responsiveness throughout the course of the evaluation. All pertinent observations are to be considered and fully noted in assessing abilities.
- 8) The assessor shall document the actual time and distance of each applicant at pre-established time points and document resting times and observed behaviors.
- 9) During the assessment, the assessor will explain the accessibility and benefits of using regular fixed route transit.
- 10) If at some point in the evaluation it is determined that unconditional eligibility is the obvious determination, the assessor should discontinue the evaluation at that point and precisely document the reason(s) for the determination.
- 11) Paratransit applicants are allowed to submit any documentation that they believe will be helpful in STA's efforts to make an appropriate determination. Documentation can include, but not be limited to, medical records, doctors' notes, and letters of support from rehabilitation counselors or disability specialists. The assessor will have access to review all documentation presented by the applicant prior to the time of the assessment. All submitted documentation from the applicant and the assessor will be reviewed by STA and considered in making eligibility determinations.
- 12) Specific notes detailing the functional limitations of applicants entered on the form must support the assessment determination and be supported by specific rationale, stated in plain language and sufficiently detailed to convey the conditions and/or circumstances under which an applicant or trip is considered eligible or ineligible.
- 13) The rationale for recommended determinations must be stated clearly to the Eligibility Specialist which will allow applicants who wish to appeal the opportunity to prepare an appeal request addressing the specific reasons for the determination.
- 14) The rationale for determinations must be stated clearly enough to allow STA to make trip-by-trip eligibility determinations on the basis of the information provided.
- 15) The assessment will include, at a minimum, the following:
 - a) The assessor will determine if the applicant can safely participate in the assessment process and complete the entire evaluation course. The assessor may accept the opinion of a care provider or family member that the applicant is not able to understand. Careful attention must be given not to confuse a communication disorder with an inability to participate.
 - b) An inquiry as to medications currently taken that may impair the applicant's ability to use the system.
 - c) Note the requirement for a Personal Care Attendant (PCA) and the degree of assistance.
 - d) Disability information

- specific disability type (formal name, if available);
 - disability categories including cognitive, visual physical, hearing, psychological;
 - identification of most limiting condition(s); and
- e) The applicant's ability and desire to participate in a mobility training program with documentation of decline or preparation of a referral.
- 16) The assessor must note strength and weaknesses for each of the following:
- a) Ability to pay fare or make change
 - b) Physical limitations
 - c) Cognitive limitations
 - d) Ability to recognize bus route numbers
 - e) Ability to recognize landmarks
 - f) Ability to recall transit phone numbers
 - g) Ability to walk or wheel independently
 - h) Ability to maintain balance
 - i) Ability to move from sitting position to a standing position
 - j) Ability to maneuver mobility device
 - k) Ability to follow directions
 - l) Ability to walk up to ½ mile
 - m) Discontinue if applicant shows severe signs of distress or indicates that they cannot go further
 - n) Brief rests are permitted (each rest shall be timed and distance between rests recorded)
 - o) Ability to safely cross two street crossings (real or simulated), including one with a light actuator button
 - p) Ability to ambulate up and down two 6-inch curbs forward or sideways
 - q) Ability to traverse different types of uneven terrains
 - r) Ability to traverse sloping walks, right and left
 - s) Ability to traverse a variety of inclines / ramps / slopes
 - t) Ability to stay focused on task at hand
 - u) Ability to recognize and respond appropriately to safety hazards
 - v) Ability to maneuver in/out of an elevator
- 17) Assessments will be conducted at and near the STA Plaza and/or occasionally on STA fixed routes unless otherwise authorized by STA.

- 18) Assessments will be conducted as needed and if appropriate. It is estimated that the time required to administer each assessment type is:

Initial Interview/Tinetti (MMSE)	30 minutes
Wheelchair/scooter measurement/weight and the applicant's ability to maneuver the wheelchair/scooter in a mock-up of a bus (conducted for all individuals who use a manual/powered wheelchair)	10 minutes
Physical Functional Assessment/Transit Skills Assessment	30 minutes
Cognitive Functional Assessment (FACTS)	45 minutes
Actual bus trip in community (when appropriate/not often completed)	60 minutes

- 19) For all assessments, the assessor will complete a written summary report that:

- a) Documents the answers to pre-established questions and documents the concerns of the applicant;
- b) Provides an analysis of the data gathered including observations; and
- c) Makes a recommendation on the applicant's ability to use fixed route and under what conditions, based on the level of functional abilities evaluated.

- 20) Summary reports will be processed and forwarded to STA's Eligibility Specialist within two (2) scheduled workdays following completion of the assessment. Statements due on Saturday, Sunday, or scheduled holiday closure shall be due on the first scheduled workday following the assessment.

Note: Outdoor assessments will be conducted in all weather conditions. For unusual or extreme weather conditions an alternate indoor functional skills course will be available.

- 21) Mobility Assessment Forms

Contractor shall work with STA staff to further develop and refine appropriate assessment forms. See **EXHIBITS E & F** for functional assessment form based upon the Easter Seals Program.

- 22) Mobility Assessment Consistency and Performance

All applicants for ADA Paratransit services are entitled to equal and non-discriminatory treatment. To the extent practical, the Contractor shall minimize the number of staff who shall be involved in these procedures during the term of the Contract, and ensure consistency through training of replacement or back-up staff, in order to maximize uniformity and reliability of the procedures and results for all applicants.

STA reserves the right to observe at any time the Contractor's assessment protocols, staff performing the assessments, methods and scoring systems, and/or other records related to the provision of services under the Contract.

Measurements of performance standards will be based on reports generated from the Contractor's submitted daily/weekly records and monthly reports. Additionally, STA generated data such as audits, complaints, commendations, results of eligibility appeals, and other reports will be used. See **EXHIBIT K** for 3 year history of Eligibility Appeals.

- 23) Prepare, Submit and Maintain Records and Reports

The Contractor shall prepare daily schedules, weekly reports, monthly statistical reports and billing statements, and an annual summary report of all activities related to

this contract. Reports will be available electronically and by hard copy when requested.

Daily reports shall include completed assessments by customer ID number, customer name, and customer status (new or recertifying applicant).

Monthly reports shall include:

- a) The number of assessments completed for new applicants and recertifying applicants.
- b) The number of assessments completed by disability code (code provided by STA).
- c) The number of scheduled assessments that were not completed with reasons for incompleteness.
- d) A monthly invoice for all billable activities indicating the amount to be paid with a detailed report showing:
 - Referral date
 - Assessment date
 - Name of Person evaluated
 - Client ID No.
 - Whether assessment was for new applicant or recertifying applicant
 - Number of applicants referred to mobility training
 - Recommended eligibility determination(s)
 - Documentation of what assessments were conducted, i.e. interview, Tinetti's MMSE.
 - Length of time per assessment and total time
 - Documentation of no-shows and cancellations both advanced and late
 - Total functional assessment distance completed

Annual Summary Report shall include:

- a) An annual summary of the same information included in the monthly report.

24) National Transit Institute Training on Paratransit Eligibility

The Contractor (at their expense) is responsible to send the Program Manager and the person primarily responsible to conduct in-person assessments to the National Transit Institute (NTI) class entitled "Complementary ADA Paratransit Eligibility Determinations". The training may also be provided for any additional or new Contractor staff as needed.

The NTI training must be completed within six months from the award of contract for the project manager and within six months of project start for the in-person assessment staff person(s).

For class listings and associated costs, please check NTI's website at www.ntionline.com.

25) Functional Assessment of Cognitive Transit Skills (FACTS)

FACTS is a functional assessment tool designed in 1996 under the direction of Easter Seals Project ACTION that was developed and validated to predict the abilities of persons with cognitive abilities to use fixed route bus services. The FACTS

takes approximately 45 minutes to administer and an additional 15 minutes for completing the documentation.

Training for the FACTS is mandatory and may be provided by the STA Eligibility Specialist or through Project ACTION at the Contractor's expense. Contractor staff will provide back up support to the STA Eligibility Specialist to complete FACTS assessments.

26) Easter Seals Project ACTION

The in-person interview and assessment is based on the Easter Seals Project Action training document titled "Determining ADA Paratransit Eligibility: an Approach, Guidance and Training Materials," August 15, 2003.

F. STA REQUIREMENTS--IN-PERSON ASSESSMENTS

STA staff will make referrals for the three part in-person assessment process (4 and 5 are as needed only):

1. Interview
2. Tinetti Balance and Gait assessment
3. Functional skills assessment

4. Mini mental assessment (as needed)
5. Wheelchair weigh/measurement (as needed)

STA will have available staffing to work with the In-Person Contracted Staff, including:

1. One (1) Eligibility Specialist, on site at the Mobility Center
2. One (1) Transportation Manager-Paratransit and Vanpool Service
3. One (1) Ombudsman/Accessibility Officer
4. One (1) Paratransit Contract Manager
5. One (1) Paratransit Assistant

The STA Paratransit Eligibility Specialist will:

1. Conduct the initial review of the application upon receipt and make a determination on the need for an in-person interview/assessment.
2. Refer application to contracted staff to schedule appointments in accordance with all written policies and procedures established by STA Paratransit.
3. Obtain additional medical information as needed.
4. Determine the need for a mobility assessment.
5. Provide appropriate application summary information to in-person administrative/assessment evaluator in advance of assessment.
6. Review results of functional assessment and other information.
7. Make the eligibility determination.
8. Verify Trapeze client file eligibility related data.

The Transportation Manager-Paratransit and Vanpool Services will:

1. Oversee the Paratransit eligibility determination process and the operation of the mobility training / assessment functions.
2. Perform as the designated STA Contract Manager.

3. Provide administrative contact to STA Paratransit Users Group (PUG).
4. Manage Paratransit customer communications and education.
5. Conduct administrative reviews for all applicants who are denied Paratransit or whose recertification restricts previous levels of eligibility.

The Ombudsman/Accessibility Officer will:

1. Process all and complete requests for Paratransit eligibility determination appeals.
2. Process requests for sign language or language interpreters. Assist, as needed, with requests for other alternate communication formats.
3. Respond to customer comments referred from Paratransit.

The Paratransit Contracts Manager

1. Monitor and manage provider contracts.
2. Review tracking and surveys for patterns and changes needed.
3. Summarize and report performance towards goals.
4. Conduct Contract Compliance Audits.
5. Review and authorize payment of Invoice.
6. Conduct Training Shadows (Mobility Mentor and Training Programs).
7. Assist with navigating STA support services departments for coordination when needed.

The Paratransit Assistant

1. Purchase needed office equipment and supplies.
2. Work with Contractors to address any facility problems that occur.
3. Summarize and report performance towards goals.

Additional STA Responsibilities for In-Person Interview/Assessment option

1. Provide the mobility assessment course including the materials required to conduct the FACTS assessment and physical functional skills assessments.
2. Provide all facilities and equipment necessary to complete eligibility determinations. [See Equipment section.]
3. Provide program and operations management and direction.
4. Develop all policies and procedures governing the Paratransit eligibility process and in-person assessment process.
5. Define assessment standards and performance criteria.
6. Develop and furnish all public and customer information related to the Paratransit eligibility process and service provision. Such information may include but is not limited to: Paratransit application, the Rider's Guide, agency and service organization information, customer bulletins, program newsletter, and STA web site content.
7. Complete the eligibility determination process including: responding to inquiries, reviewing the application, determining eligibility, producing and mailing correspondence, verifying Trapeze data entry, and file management.
8. Coordinate follow-up activities and provide additional support to Paratransit staff in the investigation of complaints relating to the eligibility process.
9. Provide programming and system analysis support for STA provided software(s) and equipment.
10. Provide for alternative communication formats as requested or refer to the Accessibility Officer.

11. Review and monitor results and audit processes on a periodic basis.
12. Provide transportation for applicants to/from The Plaza for interview/in-person assessment.
13. Process monthly invoice in a timely manner.
14. Provide for office space and office equipment and supplies, including TDD, telephones, and computers.
15. Provide a scale and measuring area for assessing wheelchairs/scooters.
16. Provide monthly bus passes for all In-Person Assessment staff.
17. Provide Training for Contracted Employees-including:
 - a) Overall understanding of Paratransit service by providing introductory training in each of the primary functions of the program. Training shall include a ride-along on a scheduled Paratransit van route, and introductory training and tour of reservations, scheduling, dispatch and administrative office area.
 - b) A training workshop, as needed, prior to the start of this contract for the Project manager, Contractor staff and other designated representative(s) to provide an overview of STA Paratransit policies, procedures and philosophies.
 - c) At a minimum, the training workshop may include:
 - d) STA Van Operator/Coach Operator Customer Service Training.
 - e) The ADA complementary Paratransit regulations, specifically the regulatory definition of ADA Paratransit eligibility and STAs' eligibility policy procedures.
 - 1) Paratransit operating policies and procedures.
 - 2) Local fixed-route transportation services and the skills needed to successfully use local services.
 - 3) Sufficient training in Trapeze software and any portion used to perform the work of the positions to be proficient.
 - 4) Review and understanding of the Easter Seals Project Action Training (section G of Section 4.5 above).

G. STAFFING IN-PERSON ASSESSMENTS

Staffing will include the following positions. The successful Contractor will determine the number of staff needed to fulfill the requirements listed in the scope of services.

On-Site Project Manager

This position's responsibilities may be combined with the mobility training project manager as well as the manager of the volunteer mobility mentor coordination program. See the Responsibilities & Qualification for the position in section 3.7.

In-Person Interview/Assessor – Responsibilities & Qualifications

1. Measure and weigh and record common wheelchair information for all referred applicants who use wheelchairs/scooters.
2. Conduct interview of each referred applicant.
3. Conduct a Tinetti Gait and Balance test on each referred applicant, where applicable.
4. Conduct mini-mental survey on an "as needed" basis.
5. Conduct physical transit skills assessments following consistently the Easter Seals Project Action model (unless deviations authorized by STA).

6. Identify most limiting disability or aspect of the disability with a recommendation of appropriate ADA eligibility level.
7. Refer to Orientation and Mobility specialist as needed for applicants with significant vision impairments.
8. Be aware, sensitive, and responsive to the needs of each Paratransit applicant.
9. Provide for bottled water bars for those Paratransit applicants who may be in need.
10. Identify, market, and refer Mobility training services as appropriate during and after applicant assessments.
11. Maintain a current 1st Aid CPR certification.
12. Forward all written interview/assessment and recommendation report forms within two (2) business days to STA staff.
13. Report all customer complaints within timely manner.
14. Carry a working cell phone at all times to communicate possible emergencies with the applicants during the interview/physical functional assessment.
15. Attend STA staff meetings as needed or requested.
16. Conduct FACTS (Functional Assessment of Cognitive Transit Skills) as needed.
17. Continuously implement or recommend improvements to the work processes to enhance service quality.
18. Be knowledgeable about Paratransit and specific conditional eligibilities to provide good customer service.
19. Be knowledgeable and familiar with the skills needed to ride the Fixed Route Bus Service.
20. Serve as backup to the Eligibility Specialist as required.
21. Be observant about applicants' behavior and orientation to person, place, and time. Document observations on written report.
22. Complete paperwork to document interview and functional assessment results.

In-Person Assessor

The In-Person Assessor shall be competent to make determinations of functional and/or cognitive abilities in compliance with STA's requirements as outlined in this RFP.

The In-Person Assessor must meet or exceed these minimum qualifications:

1. Two years' experience related to evaluating the functional abilities of individuals with disabilities.
2. Excellent interaction and sensitivity awareness in order to work with people possessing varying levels of abilities.
3. Excellent organizational and documentation skills.
4. Excellent written and oral communication skills.
5. Knowledge of physical/occupational/rehabilitation therapy principles and/or medical skills and training related to physical functioning and/or physical functional assessments. (This qualification is not required, yet is highly desired).
6. Experience interviewing individuals in order to obtain essential information.
7. Certified (or will be within six months of startup or hire) in 1st Aid/CPR.
8. Demonstrate a clean criminal background check
9. Conducting yourself professionally and ethically as a representative of STA.

The In-Person Assessor shall conduct in-person assessments, which include:

1. Conducting formal mobility assessments in a manner reflecting positively on the professionalism, fairness, consistency, and accuracy of STA and the established eligibility process;
2. Documenting an individual's ability to use accessible fixed route transit;
3. Orienting individuals to their accessible fixed route options by providing knowledgeable and positive information regarding STA's accessible bus system;
4. Making accurate judgments adhering strictly to ADA Paratransit eligibility criteria and Paratransit service policies and procedures;
5. Determining the level of ability to use STA's fixed route system through observation and personal judgment, the applicant's answers to questions and functional test(s), and any other pertinent information provided by the applicant;
6. Documenting assessment outcomes for use by STA Eligibility Specialist in determining ADA Paratransit eligibility;
7. Maintaining a professional atmosphere and efficient process for applicants and advocates participating in mobility assessments; and
8. Preparing objective, measurable, legible, accurate, and thorough documentation of all aspects of mobility assessment.

Contracted Clerical Position (estimated .75 FTE)-Responsibilities & Qualifications

The person filling the clerical position must meet the following minimum qualifications:

1. A minimum of one (1) years' experience in a clerical position, with experience in writing and typing correspondence, filing, answering multi-line phone systems.
2. Proficient in various computer software programs, including all Microsoft Office Applications.
3. Experience in working with persons with disabilities and persons who are older.
4. Knowledge of STA's Fixed Route Bus system and schedules
5. Demonstrate a clean criminal background check.
6. Conduct that reflects yourself professionally and ethically as a representative of STA.

The position's responsibilities include the following:

1. Responding to all Paratransit program inquiries and requests for applications.
2. Documentation of receipt of Paratransit applications, prepare applications for review in-person assessment staff person, schedule assessments, and make reminder appointment calls and/or send reminder postcards as needed, reschedule appointments as needed.
3. Coordinating transportation for applicants using Paratransit for transportation to and from assessment appointments.
4. Greeting and directing applicants as they enter the facility waiting area.
5. Notifying staff of applicant arrivals and appointment cancellations.
6. Providing administrative support to Paratransit eligibility staff as required, i.e. filing, copying, typing, data entry, and new/recertification applicant packets and determination letters
7. Send Letter notifying applicant of eligibility determination in writing within 21 days of receiving a completed application and assessment reports
8. Answering phones and taking message for the entire office area, including eligibility and mobility training functions.
9. Compile daily, weekly, and monthly reports.

10. Other administrative duties as assigned (such as taking customer photos).
11. Data input into Trapeze all client and eligibility related information.
12. Assist with obtaining required and proper guardianship paperwork and power of attorney (POA) as needed.
13. Coordinate the incoming/outgoing mail for the Mobility Center.

H. OFFICE SPACE -- IN-PERSON ASSESSMENT PROGRAM

As noted previously, STA has office space for the mobility training staff located at 701 West Riverside Avenue, on the 2nd floor of the downtown Plaza.

The Plaza will also serve as the location for the Paratransit eligibility determination process including the in-person interviews and functional assessments. The Plaza's activities will focus on a public transportation theme and also will serve as a center for Paratransit applicants and the general public to access transit education to include transit orientation and mobility training. The STA Paratransit Eligibility Specialist staff person, the Contractor's mobility assessment staff person, and mobility training program staff will occupy joint office space.

In or near The Plaza is an outdoor and indoor course area provided by STA for use in the mobility assessment process. The course will use simulations directly reflective of environments and situations people encounter when they use the fixed route system. The area will include a maximum of 1/2 mile safe walking route, a minimum of two street crossings, curb cuts, various sloping conditions including right and left side sloping areas, various sidewalk conditions and terrain. The functional assessment course has been designed based on the Easter Seals Project Action conducting functional assessment.

The Plaza's location will also provide easy access to the fixed route bus for use in evaluating abilities on an actual bus trip if desired.

IV. TECHNOLOGY SUPPORT

I. Background

STA works to automate as much data entry and information detail as possible. The successful proposer will assist STA towards that goal with systems that allow automated data entry or input and output (for example developing determination letters, requests for additional information or developing reports and invoicing).

For each of our programs, Mobility Training, Volunteer Mobility Mentor Coordination and In-Person Assessment there is an automated data gathering input and output system.

For our In-Person Assessment program, there is also a system that inserts or updates the data gathered during the assessments into the Trapeze software system. The Address/Eligibility and Client tables for updated. This information is vital for our Paratransit system as it is the basis for which a booking or reservation can be made.

J. Future Considerations

Our current data capturing system for In-Person Assessments is only communicating with Trapeze one-way, from the Contractor to STA's Trapeze system. In the future, STA would like to the communication to be two-way, so that data can be updated in the Contractor's system so that only the needed updates are made.

Our current system inputs address information without including Latitude/Longitude information. In the future we look to have this lat/lon information included as well.

K. Requirement

The successful proposer will demonstrate their technologies used data gathering, entry/input systems (for all three programs, Mobility Training, Volunteer Mobility Mentor Coordination and the In-Person Assessments). If Opting for the In-Person Assessment, the proposer will also discuss their current ability (or ability to develop) to insert or update data into the Trapeze Software system.

V. INNOVATION

A. Background

STA is an organization committed to continuous improvement. Towards that end, we strive to bring new and effective ideas to our operations. We seek Contractors who share this commitment to continuous improvement. As part of our continuous improvement, we work to training our staff each year on industry standards and innovations. We compare our operations to others in our state and throughout the country. We participate in users conferences, benchmarking groups and workshops to continue our learning and bring back ideas for operations improvement.

B. Requirements

The successful proposer will demonstrate where they have brought to other agencies or contracts innovative ideas that have changed or improved operations. Proposers should demonstrate one or two innovative items they can bring to any or all of the programs discussed in this Request for proposal.

VI. **ADDITIONAL REQUIRED CONTRACTOR PROGRAM ELEMENTS FOR ANY/ALL PROGRAMS: MOBILITY TRAINING, VOLUNTEER MOBILITY MENTOR PROGRAM, & IN-PERSON ASSESSMENTS**

7.1. Contractor Selection and Training for Employees

Proposers should make their own determination as to the number of staff required for each position, the amount of cross-functional work that can be performed by staff in order to provide STA with a cost effective and efficient mobility training program, volunteer mobility mentor coordination and in-person assessments processes. The proposed number, staff qualifications, and their responsibilities should be submitted in your proposal. The on-site project manager position can be combined if the proposer is opting for more than one program. The time spent on each program for the manager is determined by the Contractor. Please see EXHIBIT M for current staffing levels for each program.

Contractor shall provide STA with documentation of qualifications for each In-Person Assessor before they begin to conduct assessments. All assessors must be approved by the STA Transportation Manager-Paratransit and Vanpool before hire.

It is important to recognize the unique challenges presented to all Contractor employees who will have responsibility for communicating with people with disabilities. The Contractor's approved training program shall include adequate training time to assure employees' success in their communications with their customers.

Communication challenges may include: understanding what the customer is saying, being understood by the customer, using the available translation service for non-English speaking customers, speaking directly to the customer when a translator is employed, and exercising patience and sensitivity in respect to the needs of all persons regardless of age, disability, or ethnicity.

All Contractor training will be reviewed and approved by STA. Full and accurate training records shall be consistently maintained and available to STA staff for annual training audits and as requested. Each training record shall indicate the content of the training and will include a signed attendance forms.

Contractor training for new employees must be completed before delivering services and shall include: *(Items 1 to 6 are required for mobility training, volunteer mobility mentor coordination and In-Person assessment staff. Items 7 to 10 applies only to In-Person Assessment Staff)*

1. A minimum of four (4) hours of customer service training.
2. A minimum of eight (8) hours sensitivity training, which teaches disability awareness and develops communications skills with individuals with disabilities
3. Training regarding different types of disabilities, general functional characteristics of persons with various disabilities, communication difficulties, and staff interaction with persons with disabilities
4. Sufficient training in computer programs used to perform the work of the position to be proficient.
5. Training on emergency procedures.
6. Training on STA's policy/procedures and observation of functional areas. Estimated at 12 hours total.
7. Training in interviewing skills

8. Completion of the NTI Training Class entitled “Complementary ADA Eligibility Paratransit Determinations” as otherwise directed in this RFP for specific positions previously identified. (This training may be completed within six months from the startup or hire date. Completion of the FACTS Assessment Training.
9. Training in administering the Mini-Mental Status Examination.
10. Training on the effective and consistent use of the Easter Seals In-Person Assessment program.

7.2 Ongoing Training

STA recognizes the benefits of providing skill development opportunities to employees and expects that the Contractor shall provide each employee a minimum of twelve hours training annually that will enhance their work performance. On-going training may take the form of regularly scheduled staff meetings, introduction of new tools, guest speaker appearances, seminars or discussion of a specific skill or training/assessment challenge encountered.

7.3 Mission and Staff Suitability

STA’s goal is to use an eligibility determination process that is accurate, consistent, meets the ADA requirements, and allows the staff and the applicant to identify the most suitable public transportation mode based on the applicant’s functional abilities.

STA reserves the right to determine the suitability of any employee to continue performing work for the program. Should STA receive information about improper, illegal, or unsafe conduct on the part of the Contractor’s employee, STA may determine the person unfit to continue to provide service. The Contractor will be notified of any such determination in writing.

7.4 Staff Changes

Any changes in staffing levels, salaries or benefits that results in changes in the costs or FTEs proposed in this contract require prior approval from STA before they are eligible for cost reimbursement. The request for a change must be made to STA in writing and must provide justification for any increase in cost and a description of the benefits of making the change.

7.5 Administrative Leave

STA may direct that a Contractor employee, who is the subject of a serious complaint be placed on administrative leave pending completion of the investigation. Compensation of any employee placed on administrative leave will be solely the Contractor’s responsibility for the duration of the leave.

7.6. Hours of Operation

Each of the functions including mobility training; volunteer mobility mentor, and in-person assessments will operate during the following days and hours:

<u>Area</u>	<u>Weekday</u>	<u>Saturday</u>	<u>Sunday/Holiday</u>
Administration	8:00 am -5:00 pm	as needed/Seasonal*	Closed
Mobility Center	8:00 am -5:00 pm	as needed/Seasonal*	Closed

**Note: Any function may operate on one or two Saturday mornings depending upon demand for off-work hour appointments or staffing shortages. This may be requested by STA or by the Contractor.*

Services will be closed on the following holidays:

1. Memorial Day
2. Independence Day
3. Labor Day
4. Thanksgiving Day
5. Christmas Day
6. New Year's Day
7. President's Day

Evaluations may be suspended to conduct staff meetings and training with advance approval from the STA Transportation Manager-Paratransit and Vanpool.

7.7 Facility Use

Employee conduct at a STA-owned facility must comply with procedures intended to preserve a safe, secure workplace that protects the security and safety of customers and co-workers. Contractor employees are expected to properly and respectfully maintain STA owned facilities and not engage in destructive or damaging activities.

7.8 Participant Safety

All persons referred to the Contractor for in-person assessments or training, and many persons participating in group mobility trainings, will have some degree of physical or cognitive disability. The Contractor will have policies and procedures in place and will train staff sufficiently to prevent customers from being placed in unsafe situations during mobility training or during an in-person assessment. Customers may encounter potentially unsafe situations during travel or where a disability may make a person particularly vulnerable. The training program will be designed to avoid exposure to or provide the skills necessary to deal with those situations.

7.9 Emergency Policies and Procedures

The Contractor will have policies and procedures in place to respond to any emergencies which may arise during training or assessments in the field. Emergency policies and procedures should take into account that mobility training and in-person assessments may take place in a wide range of environments and times of day in order to meet the participants' primary travel needs. The Contractor will ensure all staff are equipped with cell phones (paid for by STA) for use in the field. (*NOTE: with the exception of the clerical position.*)

The Contractor shall notify the STA Transportation Manager-Paratransit and Vanpool or his/her designee immediately of any accident or incident involving any person receiving training, and regardless of injury. All accidents/incidents must be documented and forwarded to STA personnel within twenty-four (24) hours.

7.10 Complaints

All service related complaints must be documented, researched, responded to and forwarded to STA personnel within five (5) days.

7.11 Scheduling Training and Hours of Service

The Contractor will schedule screenings, training, and other associated activities in a manner that maximizes efficient uses of staff resources. For persons identified as suitable candidates,

training should be completed as promptly as possible while still meeting the objective of providing the persons with sufficient skills to allow them to independently use regular accessible bus service to meet their primary travel needs.

The Contractor will be available during normal business hours of 8:00 a.m. to 5:00 p.m., Monday through Friday, to handle referrals, conduct screenings, and provide training. Periodically, to meet the primary travel needs of trainees, the Contractor will provide services during the same times of day, at the same places, and on the same days as the bus service the trainee intends to use. Training will be designed to accommodate the trainee's work schedule or other regularly scheduled activities, which may require services to be delivered in the evenings and on week-ends.

Coverage of the phone will be constant during normal business hours of 8:00 a.m. to 5:00 p.m. During lunches and breaks of the clerical position, other staff will cover for the clerical position.

See **EXHIBIT R** for phone call volume history.

Any time that phone calls will not be answered by a live person, for example group training; staff retreats, etc. STA must be notified at least 24 hours in advance to arrange for coverage.

7.12 Confidentiality

During the routine performance of their jobs, the Contractor and sub-contracted staff will have access to confidential personal and medical information about persons referred for training or in-person assessments, whether obtained through the screening and training process or provided by STA. This information is considered privileged, and shall not be used or divulged by the Contractor or staff members for any purpose unrelated to the performance of services under this contract. All Contractor staff shall be informed of and observe the confidentiality policy.

A written confidentiality acknowledgement from the trainee or the trainee's representative will be included on the "Agreement to Participate" form. The conditions of this confidentiality acknowledgement shall be observed by the Contractor and the Contractor's staff. Breach of confidentiality shall be grounds for termination of the contract.

7.13 Record Keeping and Data Collection

The Contractor will retain all books, records, documents, and other material relevant to the performance of services under this contract for six (6) years after contract completion, or earlier termination. State or federal auditors and any persons duly authorized by STA shall have full access to, and the right to examine and copy, any such materials during the above-mentioned period. If STA and the Contractor's contracting relationship ends, the Contractor is required to forward all materials to STA for retention.

7.14 Contractor Procedures Manual

The Contractor is required to have a written general employee procedures manual.

STA reserves the right to observe at any time the Contractor's training protocols and methods and other records relating to the provision of services under the contract. In addition, STA reserves the right to observe the Contractor's staff conducting the services performed under this contract. STA reserves the right to inspect any and all financial, personnel, training, and other records, plus any and all facilities relating to the provision of service under this contract.

7.15 Vacancy of Project Manager

If a vacancy occurs in the project manager position after the STA Board of Directors award of contract date, the Contractor must work to replace the position in a timely manner. STA has the

right to review the qualifications of the proposed manager and approve the candidate for the position before the final candidate is confirmed.

7.16 Insurance Requirements

See Subparagraph 1.13 of the Contract (**Attachment A**) for Insurance Requirements

7-17 Work Site Safety

The Contractor shall have the “Right to Control” and bear the sole responsibility for the job site conditions and safety. The Contractor shall be responsible for self and any and all Subcontractor compliance with applicable federal, state, and local safety regulations.

The Contractor shall obtain and maintain the minimum insurance as stated in the contract provision 1.13. Proof of insurance evidenced by a certificate of insurance shall be provided by the successful Contractor prior to contract execution and shall be kept current each year.

7.18 Reimbursement

The Contractor will be reimbursed at a specified and agreed upon and consistent hourly rate for all components/tasks of the Mobility training, volunteer mobility mentor coordination, and the in-person assessment programs.

Mobility Training Only: If in the field (as the Assessment or home site of the trainee) if there is No show, one hour may be billed for the no show.

7.19 Liquidated Damages

STA may assess liquidated damages to the Contractor whenever the Contractor does not meet the performance standards specified in Section 3 and 4 - Scope of Services due to reasons within the Contractor’s control. Assessing liquidated damages shall not abridge or affect any other remedy which STA may have for any damages which STA may incur in consequences of the failure of the Contractor to perform in accordance with the terms of this contract.

Liquidated damages are for the purpose of any delay or impact caused to STA by virtue of the Contractor’s acts or omissions. STA and the Contractor will agree that such damage is not reasonably capable of calculation. Such damages are very difficult to accurately estimate because of numerous factors including, but not limited to, inconvenience to Spokane and its customers. Because it is not reasonable to forecast all factors that would affect STA, liquidated damages are included to establish certainty in consideration of actual or anticipated damages. Liquidated damages only apply to the specific events identified and do not relate to other damages that might accrue as a result of a breach of the agreement.

Procedure for Assessment

Before assessing liquidated damages, STA shall use the following procedure:

- a. STA shall determine whether the failure to meet the standard could reasonably have been prevented by the Contractor. Failures caused by inaccurate or untimely communication by STA, unrealistic schedules given to the Contractor by STA, natural disasters or extreme and unusual weather, or unusual traffic conditions shall not be considered preventable by the Contractor.
- b. If STA determines that the failure could have been prevented, STA will notify the Contractor of the details of the incidents and of its intent to assess specific liquidated damages. Before liquidation damages are charged, a meeting will be held to review and discuss all liquidated damages.

- c. All liquidated damages assessed will be deducted by the Contractor from monthly invoice otherwise due and owing to the Contractor.
- d. For justifiable reasons, STA may elect to waive the assessment of any of the stated liquidated damages.

Guidelines for liquidated damages

- a. **Late submission of Mobility Training Final Report.** Late submissions of Final Mobility Training Reports are not acceptable; they must be submitted with the invoice for the month of the training. When a report is submitted, if it is submitted between 11 and 20 working days after the training is invoiced, the liquidated damages will be \$50.00 per late report. If the submission is 21 working days or more after training is invoiced, the liquidated damages will be \$100 per late report.
- b. **In-Person Assessment Report Late.** Late submissions of the In-Person Assessment Report to STA Eligibility Specialist are not acceptable; reports must be submitted within 2 working days. Any report submitted between three (3) and seven (7) working days after completion of the assessment will incur \$50.00 liquidated damages per late report. If the report is submitted eight (8) or more working days, the damages assessed will be \$100 per late report.
- c. **Late Submission of Mobility Mentor Volunteer Training Event/Training Report.** Late submission of summary of volunteer training events are not acceptable. The Mobility Coordinator must ensure the event/training reports are submitted in a timely manner. Any report submitted at 20 working days of the event/training will incur a \$50 liquidated damage per late report. If the report is 30 days or more after the event, a damage for \$100 will be assessed per late report.
- d. **Complaint Resolution.** All service related complaints must be documented, responded to and forwarded to STA within five (5) working days of the initial complaint. Documentation submitted between six (6) and ten (10) working days after the initial complaint will incur \$50.00 per late report. If the documentation is submitted eleven (11) or more working days after the initial complaint, liquidated damages assessed will be \$100 per late report.
- e. **Serious Incident Notification.** \$1,000 per incident for failure to report (both verbally and in writing) in a timely manner, trainee/assessee injuries, claims of abuse, and all customer injuries requiring medical attention. Timely in this case is defined as "as soon as practical and no later than 24 hours from the incident.
- f. **Fraudulent Data** - \$1,000.00 for each incident of fraudulent data being reported (i.e., indicating trainee is trained or assessed when he/she has not been trained or assessed or fraudulent hours).
- g. **Vacancy of Project Manager** - If a vacancy occurs in the project manager position after the STA Board of Directors award of contract date and within the first full six (6) months of the start of the contract a penalty of half the annual salary may be applied.
- h. **Late Replacement of Project Manager** A penalty of \$50 per day in which the position remains unfilled after 30 days.

7.20 STA Technology Policy

Contracted staff shall comply with the Computer Policy and User Agreement (**EXHIBIT J**) established by STA to govern use of STA-owned computer equipment and software.

7.21 Equipment Provided by Contractor

Contractors may choose to provide their staff with additional equipment necessary to meet corporate requirements. Costs associated with provision, installation and maintenance of such equipment shall be the responsibility of the Contractor and the equipment must operate independent of the STA network.

7.22 Procedure Manual Development and Maintenance

Procedure manuals are under development for the Paratransit Eligibility Determination Process and shall serve as a resource and reference for STA employees and contracted staff. Procedure manuals will be reviewed and updated annually or when new policies and/or procedures are adopted. Assessment staff may be required to revise procedures or manuals at STA's direction.

7.23 Process Improvement

The Project Manager is expected to participate in process quality improvement efforts and to make staff available for participation as needed. Participation may include researching, assessing and implementation of productivity and process improvements.

7.24 Public Information

All information distributed to customers will be subject to prior review and approval by STA.

7.25 Future Considerations

STA also reserves the right to modify any or all forms and reporting methodology as needed to continuously improve its processes and procedures.

STA reserves the right to facilitate a facilities move at its own expense if the Plaza facility is no longer available for project office space.

7.26 Billings

The billing structure will be based upon a flat per-service hour rate, excluding vacation and sick leave time.

In the monthly invoice, the Contractor is required to document specific hours for mobility trainings (assessment, basic, intensive or group), outreaches, mobility mentor coordination, mobility mentor trainings, In-Person assessments, and administrative and train the trainer time.

VII. ADDITIONAL STA REQUIRED ELEMENTS FOR MOBILITY TRAINING, VOLUNTEER MOBILITY MENTOR COORDINATION SERVICES TO CONDUCT IN-PERSON ASSESSMENTS

STA supplies the building space and all building systems such as water, electricity, garbage and recycling, building maintenance, grounds maintenance, and janitorial service. STA also supplies all the office equipment needed to conduct Paratransit business, collect data, and produce documentation and reports.

Standard office equipment includes personal computers, modems, printers, copiers, fax machines and telephones. Office supplies including paper for copiers, printers and fax machines, printer cartridges and copier supplies are provided.

STA is responsible for maintaining equipment in working order. All equipment, furniture and furnishings purchased by or reimbursed by STA shall remain the property of STA after the contract period. All capital equipment or furniture shall be identified with a STA asset label and be subject to an annual inventory process.

The Contractor will be held accountable for loss of assigned portable equipment and for providing timely notification when equipment does not work properly.

8.1 Workstations

A total of six (6) cubicles with workstations, one waiting room, one interview room, and one conference room will be available for Contractor staff. The interview room and conference room will be shared resources with the STA Eligibility Specialist.

8.2 Assessment Equipment

- A Commercial scale to weigh customers with their mobility devices
- A fixed route bus mock-up with ramp

8.3 Promotions

For all programs, STA will provide written promotional materials (i.e., brochure and handouts). These materials will be developed in coordination with STA's communications department. STA may provide some media promotions (i.e., radio advertisements) from time to time at STA's discretion and STA will provide information promoting all programs on its website.

8.4 Bus Passes

All Contractor employees who are working on the STA contract will be provided with monthly bus passes

8.5 Uniforms

All Contractor line employees will be provide with a uniform allowance.

- There is an initial amount of \$500.
- An additional amount added monthly to mirror the amount provided to STA Van Operators.
- All rules defining uniform allows are the same as those for STA Van Operators.

8.6 Computer Hardware

STA provides maintenance of all hardware systems provided by STA. A total of a minimum of three (3) laptop computers and three (3) desktop computer will be provided for all functions.

8.7 Computer Software

- STA provides the following computer software necessary for Contractors to comply with the requirements of this contract as deemed necessary by STA
- Windows operating platform for all computer workstations: Outlook, Word, Access, Excel, PowerPoint and transition to Microsoft Office 2013
- Internet access as required.
- Access to Trapeze Certs module, client, and trip history files.
- STA supplies programming and systems analysis support for all provided software and computer hardware.

8.8 Telephones

STA will provide a phone system with voicemail for each workstation.

8.9 Communication Equipment

STA will provide portable communication devices such as cell phones with internet access as needed.

VIII. REQUIRED QUESTIONS AND ANSWERS, DESCRIPTIONS AND DOCUMENTS

These items are to be addressed by the proposer in support of the proposer's detailed plan for performing the scope of work outlined in this RFP. To achieve a uniform review process and to obtain the maximum degree of comparability, proposers shall address each item in the order presented below; separate each section with a tab (labeled below) and identifying the proposal item by specific tab number and letter. Proposals need to be specific, detailed, and straightforward using clear, concise, easily understood language when responding to the items.

TAB 1	GENERAL INFORMATION AND SIGNATURES
	a. Completed and signed Attachments B through F - Acknowledgement of Amendments (if addendum issued) (Attachment B) - Federally Required certifications (Attachments C, & D)
TAB 2	GENERAL START UP PLAN
	a. Describe your start-up plan. Identify all tasks to be completed between the date of contract award and the service start date. In your plan, identify your assumptions, projections estimations, and key dates to accomplish the following: - Hiring Plan - List of Start Up Tasks and proposed timeline - If you are a new Contractor with STA, describe your plan for a smooth transition from the prior Contractor to your firm that ensures the least disruption for the mobility trainees, volunteers and Paratransit customers. - Detail Technical needs from STA including number of computers/licenses etc.
TAB 3	KNOWLEDGE OF SPECIFIC PROGRAM PRINCIPALS AND PROTOCOLS
	The proposer will provide a summary of their knowledge of the principles applied and protocols used for each of the programs the proposer is providing a bid for. a. Mobility Training and/or b. Volunteer Mobility Mentor Coordination and/or c. In-Person ADA Eligibility Assessment d. Give a short description of your understanding of the American with Disabilities Act and its effect on public transportation providers. e. Describe your knowledge and understanding of the medical and psychological/social aspects of disabilities, mobility related services, and available accommodations, which include accessibility, assessment instruction methods and strategies, mobility training skills and techniques, and legal and ethical issues of serving people with disabilities.
TAB 4	UNDERSTANDING OF AND PROPOSAL FOR THE MEETING THE REQUIREMENTS OF THE SCOPE OF WORK FOR EACH PROGRAM
	a. Describe your understanding and acceptance of the service requirements and how the contract will be managed. The proposer will provide a detailed summary how the proposer will adhere to the requirements of each of the programs the proposer is opting for - Mobility Training and/or - Volunteer Mobility Mentor Coordination and/or - In-Person ADA Eligibility Assessment b. Additionally describe how you plan to staff each function to meet program goals and objectives, i.e., number of FTE or PTE's - Mobility Training and/or

	- Volunteer Mobility Mentor Coordination and/or - In-Person ADA Eligibility Assessment c. Please provide an initial and ongoing training plan for each of the functional areas bid.
TAB 5	TECHNOLOGIES/INNOVATION
	a. The proposer will detail the technologies being used to help gather data, keep records and share the information with STA. See Requirements in Section V additional information. b. The proposer should provide any notations about innovative ideas to enhance each of the programs opted for. - Mobility Training and/or - Volunteer Mobility Mentor Coordination and/or - In-Person ADA Eligibility Assessment
TAB 6	MANAGEMENT OVERSITE
	a. Share your philosophy and plan for professional development of staff. Describe any and all resources that will be used to enhance staff members' knowledge and service delivery. b. Describe your firm's philosophy and methodology in meeting the needs of its contracting agency. c. Describe the ideal Contracting Agency/Contractor partnership. d. What is your budget year cycle? e. Describe your procedure for budget adjustments for service enhancements or unanticipated needs from your contracting agency. f. Please describe your Quality Assurance philosophy and program elements.
TAB 7	RECORD KEEPING, DATA COLLECTIONS, AND INVOICING
	a. Describe your procedure to collect operations data and how you will ensure completeness and accuracy. b. Who will be responsible for the data edit input function c. Provide sample copies of all required reporting. (You may also provide reports that exceed our reporting requirements.) d. Provide a sample copy of your invoice for this program.
TAB 8	ORGANIZATION, EXPERIENCE AND QUALIFICATIONS
	a. Provide an organizational chart of your firm as it will be involved in this contract, including parent company, all related operating companies and/or subsidiaries. Indicate the lines of authority for personnel directly involved in performance of this contract and relationships of these staff members to other programs or functions of the firm. Provide an organizational chart for each functional area and service level range. b. Describe the business experience and professional achievements of your firm. c. Provide brief resumes of the key employees to be assigned to STA, listing length of service with your firm, and experience specific to similar contracts (for mobility training (Travel Training), Volunteer Mobility Mentor (Bus Buddy) Coordination and/or ADA Paratransit In-person assessments) and results achieved. d. Provide an explanation of back-up support that is planned for this contract. Please specify anticipated usage of these support services.

TAB 9	REFERENCES
	a. Include a list of at least three (3) clients serviced through your office for mobility training and conducting ADA Paratransit eligibility in-person assessments in the past year that are public entities, political subdivisions, or similar accounts. With the respect to each account, - List the point of contact, telephone number and email address. - The references do not have to be the same for mobility training; volunteer mobility mentor coordination or ADA Paratransit eligibility in-person assessments.
TAB 10	FINANCIAL RESPONSIBILITY AND VIABILITY
	a. The proposer shall provide information demonstrating to STA that it has the necessary financial resources to perform the contract in a satisfactory manner and within the specified timeframe. Acceptable financial responsibility must be established by submission of copies of audited financial statements, balance sheets, and bank references, or similar document for each of the past three (3) years, and other related financial information that the proposer deems relevant to the project. b. Provide insurance documents demonstrating the ability to fulfill the insurance requirements c. Detail the number and value of your newly committed contracts d. Confirm that firm possesses or will obtain a valid business license to do business in the City of Spokane and/or Washington State. e. Please list and provide information about contracts whereas the contract was terminated early. <i>If a proposer deems any of the items requested to show financial responsibility to be confidential or proprietary in nature, the proposer shall place this portion of its proposal in a separate envelope clearly and prominently marked "Proprietary information." STA shall not disclose or reveal the contents of such separately designated proprietary information unless required to do so by law.</i>
TAB 11	PRICE PROPSAL
	a. <u>Price Proposal Form (Attachment A)</u> - Price Proposal Forms: The price proposal form (Attachment A) shall be fully completed and signed by an officer of the company authorized to submit the proposal. The proposer may make minor adjustments to the format if needed, remembering the Evaluation Committee seeks and may reward easily comparable material. <i>For evaluation purposes, proposals shall be submitted with the assumption that most work will be performed during normal business hours.</i> b. Provide a description of your billing procedures with a copy of a sample detailed invoice.

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 5A : FARE ANALYSIS

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Lynda Warren, Director of Finance & Information Services
Steve Blaska, Director of Operations

SUMMARY: Following is a tentative timeline for the fare analysis process:

- December 2015 Staff presents calendar
- February 2016 PMER/Board reviews Preliminary Proposal and approves Public Outreach
- March – May 2016 Public Outreach on Preliminary Proposal
- May 2016 Draft Recommendation
- June 2016 Public Hearing on Draft Recommendation
- July 2016 Final Recommendation for Board Decision
- Aug 2016 – June 2017 Communicate Changes
- July 1, 2017 Effective Date of Changes

STA evaluates its fares on a periodic basis. The last major review of its fare structure was conducted in 2009. This resulted in a phase in of fare changes for the years 2010, 2011 and 2012. Since that time, farebox recovery has fallen below the Board policy of 20%. Staff will review the current distribution of fare types and ridership and present a preliminary proposed fare structure for the committee to discuss.

Also attached for your information is STA's current Tariff Policy.

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

**Spokane Transit Authority Tariff Policy and Procedures
for
Fixed Route and Paratransit Services**

- I. **Effective Date:** Effective May 22, 2014, until revised by Resolution of the Spokane Transit Authority Board of Directors.
- II. **Applicability:** This policy applies to all STA fixed route and paratransit services within the STA's service area.
- III. **Tariff Policies:** The Comprehensive Transit Plan articulates the following fare policies.
- A. **Tariff Philosophy:** Spokane Transit Authority's philosophy is to encourage increased ridership by providing a convenient and reasonably priced method for citizens to enjoy the advantages of public transportation.
 - B. While the fare structure will provide value to our riding customers, a fixed route farebox return¹ objective of 20% of the fully allocated costs² of this service is maintained.
 - C. Spokane Transit's operating cost per passenger compares favorably to the Washington State statewide average of urban transit systems. To maintain this favorable comparison, increasing the fixed route ridership component of this metric will be emphasized.
 - D. Minimize complexity – emphasize a simple and easily understood system.
 - 1. Sustain a flat rate fare structure³ throughout the Public Transit Benefit Area with fixed fares for regular route/service.
 - 2. Customers use time-limited passes (two hour, day, monthly, etc.) to accomplish multi-route/directional trips. Transfers are not used.
 - E. Increase pre-payment and reduce the use of cash.
 - 1. By contract, monthly billing and post-payment may be allowed for employers, institutions and other groups participating in special pass programs.
 - 2. When possible, existing identification cards (the EWU Eagle Card, etc.) containing appropriate technology (magnetic stripes, chips, etc.) may be used to develop and implement pass programs for groups.
 - F. STA supports opportunities for low-income individuals to use public transportation at a discounted cost. These opportunities should be made available through community programs that subsidize the purchase of standard fare instruments rather than as direct STA discounts or special fare structures. This strategy helps manage eligibility challenges and supports other strategic objectives.
- VI. **Fare Types**
- A. Single Ride – direct travel from one origin to one destination on a single vehicle.
 - B. Fixed Route Two-Hour Pass – unlimited travel during a consecutive two-hour period on fixed route services.

¹ **Farebox return** is measured as the percentage of total operating costs recovered through user fares.

² **Fully allocated costs** include all administrative, maintenance, and operational costs applied to delivery of service. This cost is usually reflected as a total cost per hour that a vehicle is in service.

³ **Flat rate fare structure** means that the fare structure is consistent throughout the entire service area. There is no premium cost based on trip distance or peak service period. The alternative to a flat rate structure is a zonal fare structure in which a system of transit zones are established and different fares are charged for travel within and between zones, or different times of day.

- C. Paratransit One Ride Pass – unlimited travel during a consecutive two-hour period between paratransit and fixed route services or fixed route service only.
- D. Day Pass – unlimited travel on fixed route service during a given service day.
- E. Fixed Route 31-Day Pass – unlimited travel on fixed route service during a rolling 31-day period effective on first use or on day of purchase depending on fare media.
- F. Paratransit Calendar Monthly Pass – unlimited travel on paratransit or fixed route service during a given calendar month.
- G. City Ticket Pass – unlimited travel on shuttle vehicles during a given calendar month.
 - 1. A pilot fare structure is authorized for the use of the City Ticket Pass as a valid fare payment on Route 27 – Hillyard and Route 39 – Mission between The Plaza and the Arena during all hours of fixed route operations for the temporary period of March 1, 2014, to June 30, 2015.
- H. Student Calendar Monthly Pass - unlimited travel on fixed route service during a given calendar month.

VII. **Fare Programs**

- A. Fixed Route Reduced Fare – This program is available to people who are: 1) 65 years of age or older; or 2) have a qualifying disability; or 3) have a valid Medicare card issued by the Social Security Administration. An STA-provided reduced fare or paratransit identification card must be shown to the bus operator each time the bus is boarded and the reduced fare paid.
- B. Paratransit Fare – Paratransit eligibility is determined through an application process. Once eligibility is established, individuals are entitled to pay STA's existing reduced fare rate on fixed route services and the paratransit fare on paratransit services. The STA paratransit identification card must be shown to the operator each time the vehicle is boarded and the fare paid when using fixed route services.
- C. Employer Sponsored Bus Pass – Passes are made available, on a contractual basis, to employers with five or more employees, at a discount of up to \$3.00 per monthly pass. The employer must pass on the discount to their employees and offer a discount that at least matches the STA discount.

If an employer has a minimum of 100 participants in the program, the employer may make passes available to all employees at no cost to the employee. If so, STA will sell passes to the employer at 25% discount. This discount is not available on City Ticket Passes.

- D. Universal Transit Access Pass (U-TAP) – An annual program made available on a contractual basis in which all members of an organization have unlimited access to STA services. The organization pays a fee that allows all identified members of their organization to use STA services for the contracted time period. Eligible participants must be identifiable by an identification card that is readable by STA fare collection equipment. The number of these programs is dependent on the capacity of STA's fare collection equipment.

The contract price is based on each unlinked trip taken by members of the program. The charge for each unlinked trip is calculated based on an established rate for each route in STA's system. A rate sheet for each route is published annually and included in the annual contract update.

The participating organization is billed monthly for the previous month's trips. However, in order to allow participating organizations to budget, contracts will also include a "not to exceed" total price for an annual contract. The "not to exceed" fee will be calculated by STA prior to each contract period. Actual monthly ridership may result in the cost of the contract to be lower than the "not to exceed" fee.

- E. Student Pass – This program provides reduced cost access to public transportation for individuals enrolled in post-secondary education, technical, or job/career training institutions.

Eligible educational and training institutions are institutions that either:

- 1. are qualified providers of federal financial aid and have obtained a Federal School Code; or

2. have obtained a vocational school license issued by the Washington State Workforce Training and Education Coordinating Board.

Any individual who possesses a valid proof of enrollment in a registered institution is eligible for a Student Pass. The price of the Student Pass is the full 31-day adult fare discounted by \$8.00 through Federal and State Grant funding. If grant funding for this program is eliminated, the continuation of the Student Pass program will be re-evaluated.

- F. Summer Youth Pass – The program provides a youth customer (6-18 years of age) the opportunity to purchase a discounted three month bus pass for June, July and August).
- G. City Ticket – City Ticket is a cooperative effort with the Downtown Spokane Partnership and the Public Facilities District that allows pass holders to park at the Arena Park and Ride lot and use the Plaza-Arena Shuttle and the Southside Medical Shuttle.
- H. Pass Outlet Program – Adult, Youth, and Reduced Fare 31-Day Passes are made available to authorized Pass Outlets in quantities of at least 100. Passes will be provided to the Pass Outlet at a discount of \$3.00 per pass._

VIII. **Accepted Fare Media**

- A. Cash – Exact fare required in cash or coin, no change will be given, no pennies will be accepted.
- B. Magnetic Stripe Media – These are read by making the appropriate contact between the card and the farebox card reader. Paratransit van operators may record fare use of these for the paratransit rider as needed.
- C. Proximity Smart Cards – Smart Cards are chip-embedded cards holding data that allows a vast array of potential fare opportunities. A one-time fee for this re-useable card will be charged to the customer. The fee will be based on STA's cost to provide the cards. Smart cards can also serve as an identity card (by adding a photo and other basic information). They can be reloaded with additional value or time and reused indefinitely. They are read by passing the card near or "within proximity" of the Smart Card reader on the farebox or mobile data computer on paratransit.
- D. Identification Card – Combination ID/Smart Card issued to current participants in the STA pass programs.
- E. Free Ride Tickets or Coupons – These are coupons given to customers as STA personnel deem appropriate. They are good for one free ride on either fixed route or paratransit service.
- F. Employee Passes – All employees shall, after 10 days of service, receive free transportation on fixed route/paratransit service operated by STA. Employee Smart Card/ID Cards serve as this pass.
- G. Dependent Passes – Upon request, Smart Cards for free transportation will be issued to dependents of all active employees. These passes are renewed every two years. They are issued per STA established dependent pass criteria and must be surrendered upon the employee leaving STA employment.
- H. Retiree Passes – Upon request, Smart Cards for free transportation will be issued to employees separating from STA who meet eligibility criteria as outlined in company policy and/or union contracts. These passes are renewed every two years.
- I. Easy Park Coupons – Coupons distributed by downtown Spokane businesses that are good for a free ride on STA service or \$1 off of parking downtown. This is a partnership with Downtown Spokane Partnership and they reimburse STA for all Easy Park Coupons accepted on STA service.

IX. Fare Table effective May 22, 2014, until revised by Resolution of the Spokane Transit Board of Directors.

(Effective 22 May 2014)

Category	Cash	Two-Hour Pass	Day Pass	31-Day Rolling Pass	Monthly Pass	Summer Youth Pass (1)	City Ticket (3)
Adult	\$1.50	\$1.50	\$3.50	\$45.00			
Youth (6 – 18 years)	\$1.50	\$1.50	\$3.50	\$30.00		\$45.00	
Reduced Fare	\$0.75	\$0.75	\$3.50	\$22.50			
Paratransit	\$1.50	\$1.50			\$45.00		
Student (2)					\$37.00		
Shuttle Service							\$30.00
Special Events (4)	Determined by Special Event Plan						
Children(5) (up to 3 children under age 6 with an adult, youth, student, reduced fare, or paratransit passenger)	FREE						
Personal Care Attendant(PCA) (needs no identification; however the person with whom they are traveling must have "PCA" on their ADA paratransit identification card)	FREE						

Notes:

- (1) Summer Youth Pass is a three-month instrument covering June, July, and August
- (2) Monthly Student Pass is priced as a 31-day adult pass with discount applied.
- (3) City Ticket transit pass includes parking at the Arena east lot, as per Arena specified rules
- (4) Spokane Transit Authority CEO, with Board approval, can implement reduced special fare structures and/or alternate payments for selected community events
- (5) A responsible individual must accompany children under six (6) years of age or the child will not be allowed to board the bus or van

2015/16 FARE ANALYSIS – PUBLIC OUTREACH

Purpose: For information.

Requirement: STA is undertaking an evaluation of its fares and fare structure. The timeline and analysis is being presented.

Fare Analysis Timeline

- December 2015 Staff presents calendar
- February 2016 PMER/Board reviews Preliminary Proposal and approves Public Outreach Plan
- March – May 2016 Public Outreach on Preliminary Proposal
- May 2016 Draft Recommendation
- June 2016 Public Hearing on Draft Recommendation
- July 2016 Final Recommendation for Board Decision
- August 2016 – June 2017 Communicate Changes
- July 1, 2017 Effective Date of Changes

Fare Philosophy

Encourage increased ridership by providing a convenient and reasonably priced method for citizens to enjoy the advantages of public transportation.

Tariff policy first adopted: July 20, 2006

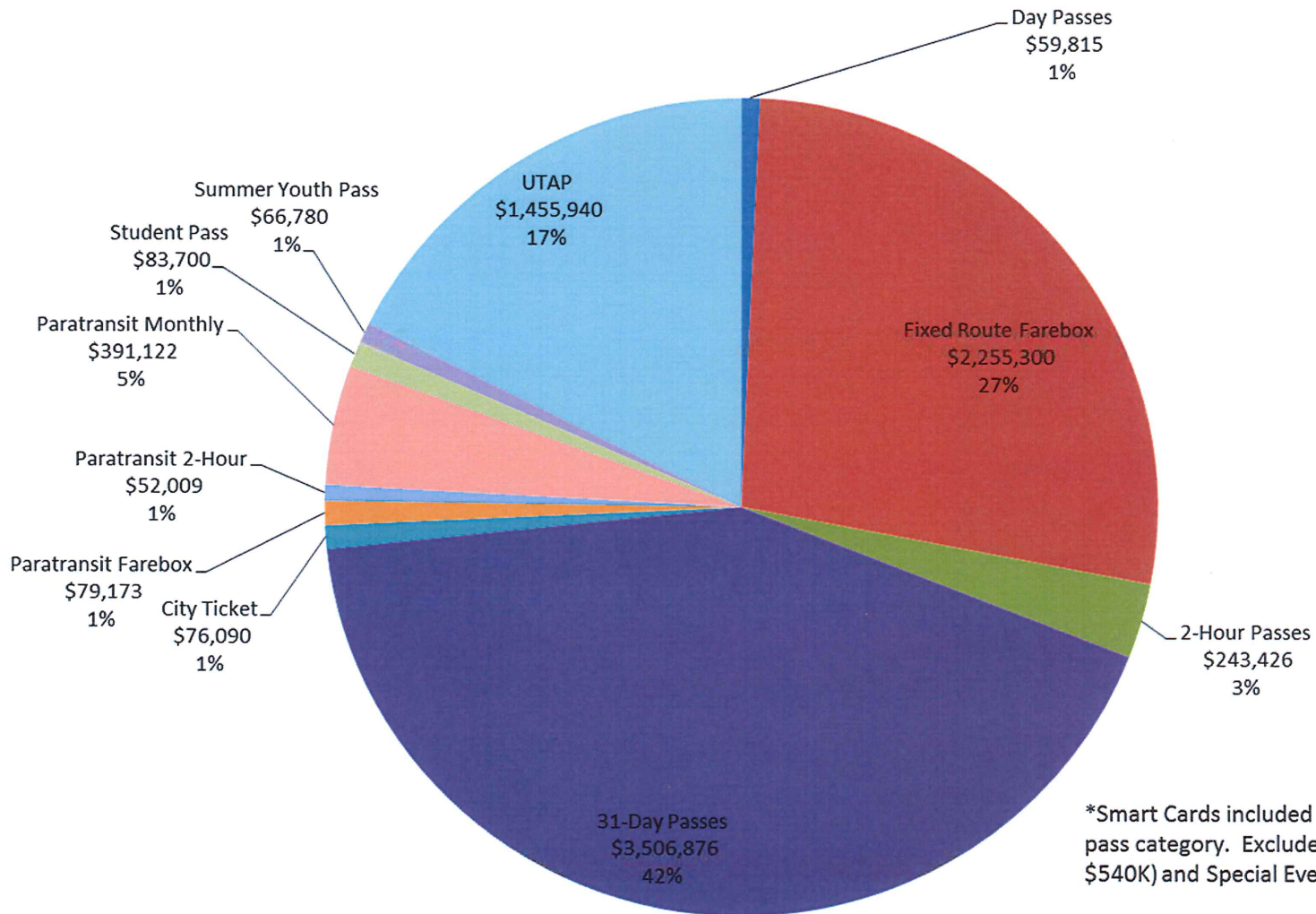
Last Confirmation: May 22, 2014

Major Objectives

- ❖ Convenient
- ❖ Reasonably priced
- ❖ **Minimum** Farebox return of 20%
- ❖ Minimize complexity
- ❖ Increase pre-payment and reduce use of cash (**No charge for first smart card**)

Revenue by Type of Fare*

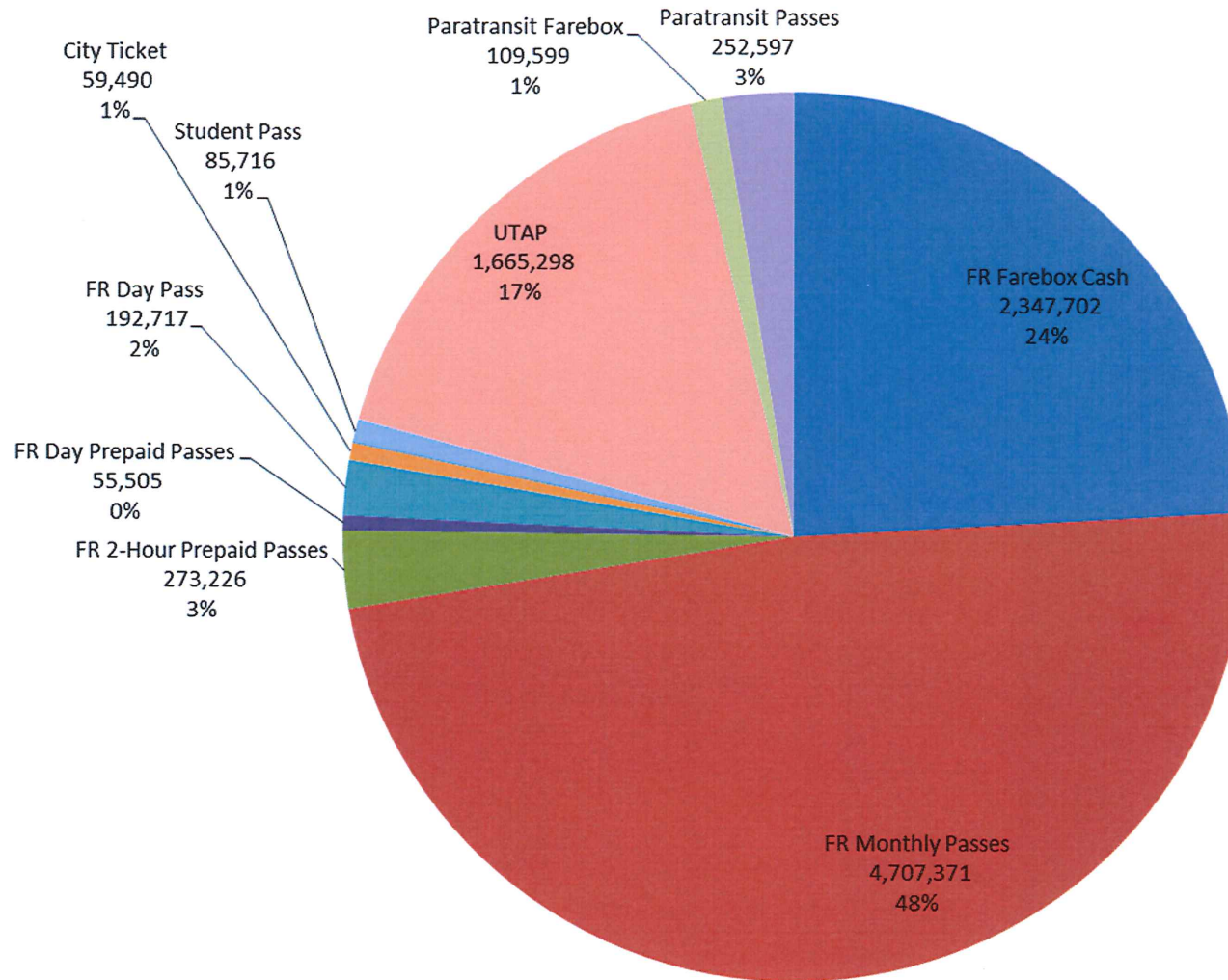
YTD November 2015



*Smart Cards included in appropriate pass category. Excludes Vanpool (appr. \$540K) and Special Events (appr. \$19K)

Ridership by Fare Type *

YTD November 2015

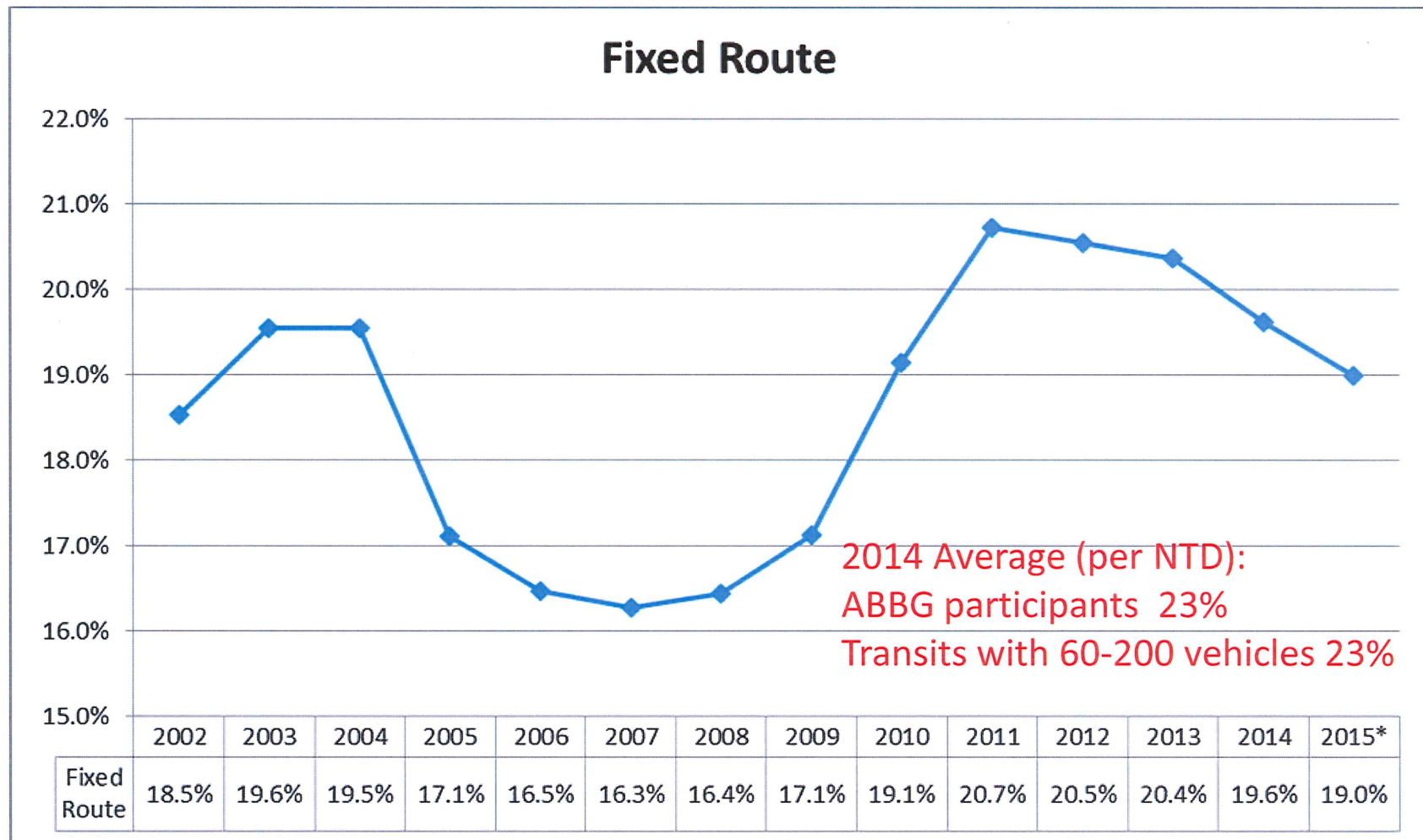


* Excludes Vanpool and Special Events.

Revenue per Trip by Fare Type YTD November 2015

	Ridership	Revenue	Revenue per Trip
FR Monthly Passes	4,707,371	\$ 3,573,656	\$ 0.76
FR Farebox Cash	2,347,702	\$ 2,047,165	\$ 0.87
UTAP	1,665,298	\$ 1,455,940	\$ 0.87
FR 2-Hour Prepaid Passes	273,226	\$ 243,426	\$ 0.89
Paratransit Passes	32,040	(Revenue is included in Paratransit information)	
FR Day Pass	192,717	\$ 208,135	\$ 1.08
Student Pass	85,716	\$ 83,700	\$ 0.98
City Ticket	59,490	\$ 76,090	\$ 1.28
FR Day Prepaid Passes	55,505	\$ 59,815	\$ 1.08
Fixed Route Totals	9,419,065	\$ 7,747,927	0.82
Paratransit Farebox	109,599	\$ 79,173	\$ 0.72
Paratransit Passes	220,557	\$ 443,131	\$ 2.01
Paratransit Totals	330,156	\$ 522,304	1.58
Total Revenue & Ridership	9,749,221	\$ 8,270,231	0.85

Farebox Recovery



Farebox recovery from internal calculations, which varies from NTD due to reclassification of Grant money that is used for fares.

*November 2015 YTD Actual

Preliminary Proposed Fare Structure

	Current Fare	Preliminary Proposal
Category	1/1/2013	7/1/2016
<u>Adult</u>		
Cash Fare	\$1.50	\$2.00
2-Hour Pass	\$1.50	\$2.00
Day Pass	\$3.50	\$4.00
31-Day Rolling Pass	\$45.00	\$60.00
<u>City Ticket (Shuttle Service)</u>	\$30.00	\$40.00
<u>7-Day Rolling (New)</u>		\$17.00
<u>4-Day Rolling (New)</u>		\$12.00
<u>Reduced Fare</u>		
Cash Fare	\$0.75	\$1.00
2-Hour Pass	\$0.75	\$1.00
31-Day Rolling Pass	\$22.50	\$30.00
<u>Student Pass</u>	\$37.00	Discontinue
<u>Youth</u>		
Cash Fare	\$1.50	\$2.00
Day Pass	\$3.50	\$4.00
31-Day Rolling Pass	\$30.00	\$40.00
Youth Summer	\$45.00	Discontinue
<u>Paratransit</u>		
Cash Fare	\$1.50	\$2.00
PT One Ride	\$1.50	\$2.00
Monthly Pass	\$45.00	\$60.00

Projected Revenue per Trip by Fare Type with Proposed Fares

	Ridership	Projected Revenue	Projected Revenue per Trip
FR Monthly Passes	4,707,371	\$ 4,675,750	0.99
FR Farebox Cash	2,347,702	\$ 2,769,169	1.18
UTAP	1,665,298	\$ 1,455,940	0.87
FR 2-Hour Prepaid Passes	273,226	\$ 321,568	1.18
Paratransit Passes	32,040	(Revenue is included in Paratransit information)	
FR Day Pass	192,717	\$ 237,898	1.23
Student Pass	85,716		-
City Ticket	59,490	\$ 95,942	1.61
FR Day Prepaid Passes	55,505	\$ 68,369	1.23
Fixed Route Totals	9,419,065	\$ 9,624,635	1.02
*Projected Revenue (\$9,624,635)/Allocated expenses (\$42,360,414)=FR Farebox Return of: 22.7%			
Paratransit Farebox	109,599	\$ 105,564	0.96
Paratransit Passes	220,557	\$ 594,710	2.70
Paratransit Totals	330,156	\$ 700,274	2.12
*Projected Revenue (700,274)/Allocated expenses (\$11,570,996)= PT Farebox Return of: 6.1%			
Total Revenue & Ridership	9,749,221	\$ 10,324,909	1.06

*Based on November 2015 YTD Data

Discussion

Encourage increased ridership by providing a **convenient** and **reasonably priced** method for citizens to enjoy the advantages of public transportation.

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 5B : PREPARATION FOR FIXED ROUTE FLEET REPLACEMENT PROGRAM – SUMMARY

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Steve Blaska, Director of Operations
Don Reimer, Manager, Maintenance and Facilities
Charlie Phillips, Maintenance Analyst

SUMMARY: Over the last several months, staff has provided information and received input from the Committee on the basis for STA's fixed route coach replacement strategy. This presentation will summarize these elements which comprise the basis for seeking the individual awards of contract for fixed route coach purchases. The first recommended award of contract will be presented to the Board in March or April this year.

To date we have provided information on:

1. The fleet replacement challenge and funding requirements for STA's current fleet. This presentation laid out the need to pre-plan the maintenance, replacement cycle, and funding for the fleet replacement program over the next ten years.
2. An analysis of the alternate fuel possibilities during this replacement cycle. This presentation concluded that the most viable near-term vehicle remains a diesel/biodiesel powered vehicle but STA should plan for integration of battery powered vehicles in this replacement cycle.
3. An evaluation of the various procurement mechanisms which are available. This presentation provided the justification as to why the best procurement option was to purchase our coaches using the Washington State's procurement contract managed by Washington State Department of Enterprise Services.
4. Four alternative scenarios as to the timing of purchases led to staff's conclusion that replacing vehicles generally on their 15th year of service at approximately 750,000 miles was the most prudent strategy. This strategy provides for flexibility over the next five years, is fully funded through the Transit Development Plan 7 year horizon, and optimizes the value of the capital and maintenance investment of each individual vehicle.

Staff will briefly review each of the first three elements as a reminder for current Committee members and as background for new Committee members. At the Committee's request, staff will cover the fourth element again in more detail as to whether the Board should challenge the staff conclusion as to the best timing for purchases.

The attached Staff Report reiterates the information provided to the Committee in December.

RECOMMENDATION TO COMMITTEE: Information only.

The intent of completing this presentation of staff's analysis is two-fold:

1. Facilitate the award of contract for the first set of coach procurements;
2. Validate the current long range capital programming to meet our fleet replacement requirement without incurring debt.

It is important for the Board to understand the basis for this plan because it is a significant element of our financial capacity to sustain service in accordance with the approved financial projections and Capital Improvement Plan/Transit Development Plan.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY

Date: February 3, 2016

STAFF REPORT: FIXED ROUTE FLEET REPLACEMENT PROGRAM – DELIVERY TIMELINES

The current programming for our fleet replacement requirement is based on the delivery of replacement coaches as vehicles in the current fleet reach 15 years old. We have determined that a fifteen year lifecycle maximizes the useful life of the each vehicle's major components (engine & transmission). Staff developed four procurement scenarios for comparison.

SCENARIO 1: Replace vehicles on 15 year anniversary date.

This replacement scenario results in a varying number of vehicle purchases each year of the fleet replacement cycle. In order to finance this requirement, some funding needs to be set aside during years where there are relatively few vehicles purchased in order to have funding available for years where greater numbers of vehicles will be purchased. This is our base scenario we have used for our financial projections.

SCENARIO 2: Balance current fleet replacement to average 13 vehicles purchased per year.

This scenario normalizes the peaks and valleys of vehicle purchases over the same time frame as Scenario 1. Some vehicles are replaced prior to their 15 year mark.

SCENARIO 3: Balance the current fleet replacement strategy to a 12 year cycle.

This scenario would normalize peaks and valleys of vehicle purchases to approximately 11 vehicles per year. This cycle would continue on an ongoing basis with vehicles being replaced every 12 years.

SCENARIO 4: Balance the current fleet replacement to implement a 15 year cycle.

This scenario has STA to begin purchasing approximately 9 vehicles per year in order to normalize peaks and valleys. This would extend the timeline it takes to complete the current fleet replacement and many current vehicles would exceed their 15 year life before they are replaced.

The following matrix compares various costs and operational/maintenance considerations of these scenarios.

Fleet Replacement Scenarios

	Cost Through 2022 TDP	Total Cost Fleet Replacement	Sustained Annualized Cost	COMMENTS
SCENARIO 1 Current Fleet Plan	\$41.7M	\$82.1M	\$6.0M to \$6.5M	(+) Manages fleet replacement using optimal 15 year/750K life cycle of every bus. (+) Consistent with major component preventative maintenance replacements (+) Reflects current TDP funding financial projections (+) Provides flexibility for service enhancements or reductions within the TDP period (-) "Peaks and valleys" in vehicle delivery schedule
SCENARIO 2 Balanced Purchase 13 vehicles/year	\$46.3M	\$80.8M	\$6.0M to \$6.5M	(+) Saves 1.9% (\$1.3M) over the 11 year total cost of the entire fleet replacement program (due to some inflation avoidance) (+) Normalizes "peaks and valleys" in vehicle delivery schedule (+) Provides flexibility for significant service enhancements within the TDP period (-) Increases costs in TDP timeframe by 11% (\$4.6M) (-) Does not maximize value of major component preventative maintenance or optimal vehicle life cycle • 13 vehicles replaced two years early • 24 vehicles replaced one year early
SCENARIO 3 Balanced Purchase 12 Year Replacement Cycle	\$44.4M	\$80.9M	\$8.0M	(+) Saves 1.5% (\$1.1M) over the 11 year total cost of the entire fleet replacement program (due to some inflation avoidance) (+) Normalizes "peaks and valleys" in vehicle delivery schedule (+) Provides flexibility for significant service enhancements within the TDP period (-) Increases costs in TDP timeframe by 6.5% (\$2.7M) (-) Does not maximize value of major component preventative maintenance or optimal vehicle life cycle • 1 vehicle replaced two years early • 19 vehicles replaced one year early (-) Transition to a 12 year replacement cycle increases frequency and annualized cost of fleet replacement program • Next fleet replacement cycle starts in 2028 (3 years earlier than currently planned) • Annualized cost of vehicle replacements increases from approximately \$6.5M to \$8M per year.
SCENARIO 4 Balanced Purchase 15 Year Replacement Cycle	\$28.0M	\$85.0M	\$6.0M to \$6.5M	(+) Decreases costs in TDP timeframe by 49% (\$13.7M) (+) Normalizes "peaks and valleys" in vehicle delivery schedule (+) Provides some flexibility for service enhancements within the TDP period. However, there is no designated fleet replacement fund as provided in the other scenarios. This constrains some options that are available in the other scenarios (-) Increases costs 3.5% (\$2.9M) over the 11 year total cost of the entire fleet replacement program (due to inflationary influence of delaying purchases) (-) Does not maximize value of major component preventative maintenance or optimal vehicle life cycle • 6 vehicles replaced two years early • 9 vehicles replaced one year early (-) 46% of the current vehicles in the fleet are extended in service beyond the optimal 15/year/750K mile lifecycle • 25 vehicles extended to 19 years in service • 19 vehicles extended to 18 years in service • 17 vehicles extended to 17 years in service

CONCLUSION:

Our assessment of these choices leads us to the conclusion that managing the fleet replacement based on the optimum lifecycle of the individual vehicles is the most prudent strategy. It provides for flexibility over the next five years, is fully funded through the Transit Development Plan 7 year horizon, and optimizes the value of the capital and maintenance investment of each individual vehicle.

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 5C : **HIGH PERFORMANCE TRANSIT (HPT) FACILITY DESIGN AND SERVICE COMMUNICATIONS STANDARDS UPDATE**

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Karl Otterstrom, Director of Planning
 Don Skillingsstad, Capital Projects Manager

SUMMARY: The High Performance Transit (HPT) network, identified in STA Moving Forward and Connect Spokane, envisions a series of transportation corridors offering high-frequency reliable service allowing customers greater access to the public transportation system and the ability to reach more destinations. This new service features improved amenities for the passengers, helping to make the transit experience attractive, safe, comfortable and more enjoyable.

In 2012, STA was awarded a \$495,000 federal grant for the project. The STA Board approved \$123,750 in matching funds and the project was approved in the 2014-2019 Capital Improvement Program (CIP). After a competitive request for qualifications, IBI Group, Inc. was awarded the design and engineering contract in October 2014 and work began on the project.

The consultant team is tasked with preparing two manuals, a facilities design manual and communications/branding manual. The facilities design manual will include plans and specifications for all stop and station amenities, including a “kit-of-parts.” This kit-of-parts will identify what amenities will be provided at future HPT stop and station locations, which may include lighting and furniture types, shelters, real-time signage, ticket vending machines, kiosks, etc. The communications/branding manual will include color schemes, material types and font/type applications, logos, route map layout, signage and other HPT specific branding features.

The consultant and STA staff have held a number of internal workshops to review and discuss concepts for this new service. The team has conducted extensive research on best practices and provided STA with various design and branding options for consideration that have been successful with other agencies. One tool that has been used throughout the project is an online information gathering website called *mySidewalk*. Questions and design options were presented to the public through this website asking for input from visitors. To date, the website has received over 23,000 views and has received almost 400 comments and responses. This input has been used to assist in the preparation of the manuals.

Preliminary design concepts for future station amenities and branding schemes have been prepared that will be presented to the public to gather input prior to preparing the final draft manuals. Upcoming events include:

- Focus Group testing on January 26 & 27
- Posting to *mySidewalk* on or before February 1
- Central City Line Steering Committee on February 1
- East Downtown/U-District Open House on February 2
- Brown Bag Luncheons in February (dates TBD)
- Neighborhood meetings January – March
- West Downtown/Browne’s Addition Open House – March 1 (Tentative)

The anticipated completion date for this project is March 31, 2016. The Central City Line is anticipated to be the first implementation of these new standards.

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

Item: 5C

**HPT FACILITIES DESIGN AND
COMMUNICATIONS STANDARDS
PROJECT UPDATE**

Purpose: Information Only.

Requirement: Committee update on the status
of the project.

Background

- The project supports the development of the High Performance Transit (HPT) network as established in *Connect Spokane*
- HPT is easy to use high frequency, all-day service that will connect major destinations in the Spokane Region
- The HPT Facilities project is two-fold:
 - Define typical station amenities and design for HPT corridors
 - Establish communication and branding standards
- STA received federal grant in 2012
- IBI Group was awarded the design contract in Oct. 2014

Best Practices

■ High-level definition of successful industry-wide implementation of:

- Facility Designs
- Intelligent Transportation Systems
- Fare Collection Systems
- Security and Safety
- Public Outreach
- Branding



Memorandum

To/Attention Don Skillingsstad, STA
File Gary Andriashak
From
Subject Spokane HTP "Best Practices" - FINAL

Date January 15, 2016
Project No VO-37020

Introduction

The best practice sets offered here provide a high-level definition of each best practice element grounded in IBI Group's real-world experience on previous projects and supported by more generation industry-based best practice guidance. Where possible, we've included a discussion of the relevance to STA's High Performance Transit Network (HPTN) project, though by virtue of their inclusion as a best practice each element is worth consideration as we move forward to further refine the definition of HPTN within STA's service that will inform the development of the Branding and Design Manuals. As well, the evaluation of transit operations and service considerations under Task 4 will provide an opportunity to discuss these best practice elements grounded in the real world of STA's operating environment.

General Structure

The Best Practices are generally structured around the following contents:

- **WHAT.** A short explanation of what the best practice is about and its main components or traits.
- **WHY.** The reason why this concept is deemed as a "best practice" in other words, the benefits it has brought to the transit agency, the users and the community.
- **WHERE.** Locations where this best practice has been implemented before (case studies), in this case only re: IBI projects.
- **RELEVANCE.** A short description of how this best practice is relevant for the particular Spokane HPTN context.
- **MORE.** Hyperlinks to documents, presentations, websites, articles, etc. that are related to the best practice being portrayed.

Best Practices Covered

When evaluating a new service or new, expanded features for an existing service, the following core best practice subjects should be reviewed:

- Facility Design
- Intelligent Transportation Systems (i.e., technology)
- Fare Collection Systems
- Security and Safety
- Public Outreach

IBI Group is a group of firms providing professional services and is affiliated with IBI/H&M Architects

Facilities Design Manual

- Manual will be prepared to provide technical guidance for implementing the High Performance Transit Network infrastructure
 - Station Siting Criteria
 - Typologies
 - Amenities
 - Engineering Design
 - Maintain Flexibility For Varying Conditions

Facilities Elements



Shelter/
Canopy
Design

Real-Time
Signage



Ticket
Vending



Service
Markers



Benches



Bike Racks
& Lockers

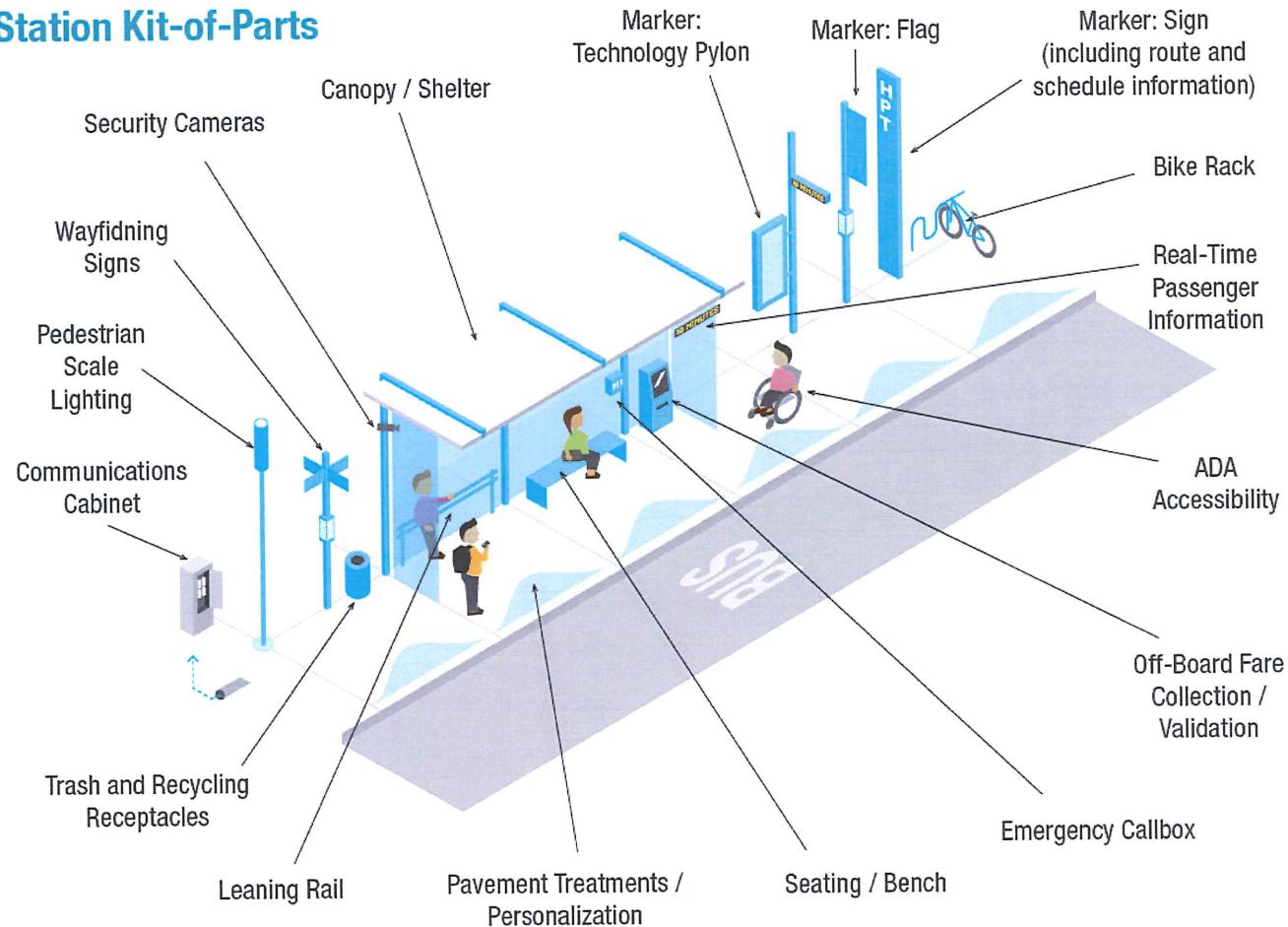


Amenities By Station Type

Station Typology	1. Transit Center	2. Off-Street Location	3. Off-Street Location	4. On-Street/ Unconstrained ROW	5. On-Street/ Unconstrained ROW	6. On-Street/ Constrained ROW	7. On-Street/ Constrained ROW	8. On-Street Low Boardings
Passenger Service Intensity	High	High	Medium	High	Medium	High	Medium	Low
Station Elements								
HPT Logo/Sign	◆	◆	◆	◆	◆	◆	◆	◆
Marker/Pylon	◆	◆	◆	◆	◆	◆	◆	◇
Line/Logo Identity	◆	◆	◆	◆	◆	◆	◆	◆
Canopy/Shelter	◆	◆	◆	◆	◇	◆	◇	◆
Paved surface	◆	◆	◆	◆	◆	◆	◆	◆
Lighting	◆	◆	◇	◆	◇	◆	◆	◇
Seating	◆	◆	◇	◆	◇	◆	◆	◇
Leaning rail	◆	◆	◇	◆	◇	◆	◆	◇
Trash Receptacle	◇	◇	◇	◇	◇	◇	◇	
Bicycle rack	◇	◇	◇	◇	◇	◇	◇	
ADA Accessibility	◆	◆	◆	◆	◆	◆	◆	◆
Platform Level Boarding	◇	◇	◇	◇	◇	◇	◇	
Improved Bike/Ped Connections	◇	◇	◇	◇	◇	◇	◇	◇
Technology/Operations								
Off-Board Fare Collection	◇	◇	◇	◇	◇	◇	◇	
CCTV Security Cameras	◇	◇	◇	◇		◇		
Public Address (PA)	◇	◇	◇	◇				
Communications Cabinet	◆	◆	◆	◇	◇	◇	◇	◇
Emergency Telephone	◇	◇	◇					
Information and Signage								
Wayfinding signs	◇	◇	◇	◇	◇	◇	◇	◇
Route/Schedule Information	◆	◆	◆	◆	◆	◆	◆	◇
Real-Time Passenger Information	◆	◆	◆	◇	◇	◇	◇	

“Kit-of-Parts”

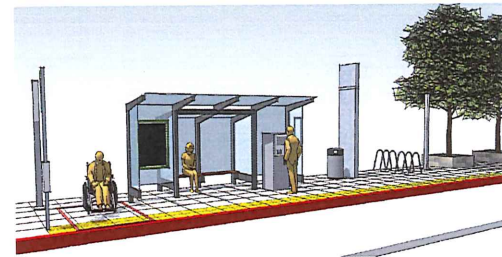
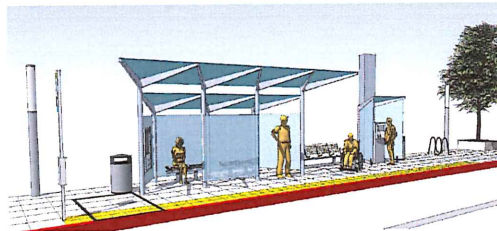
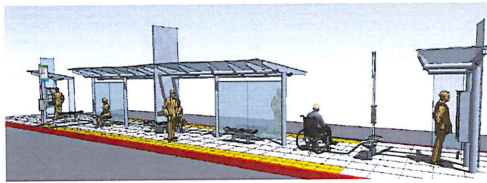
Station Kit-of-Parts



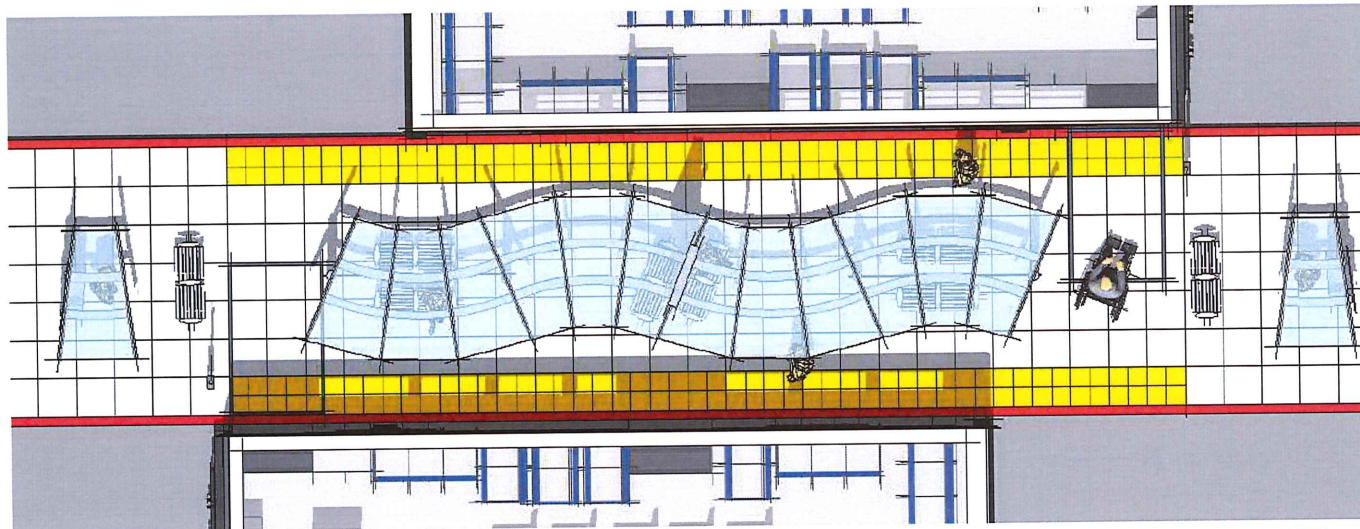
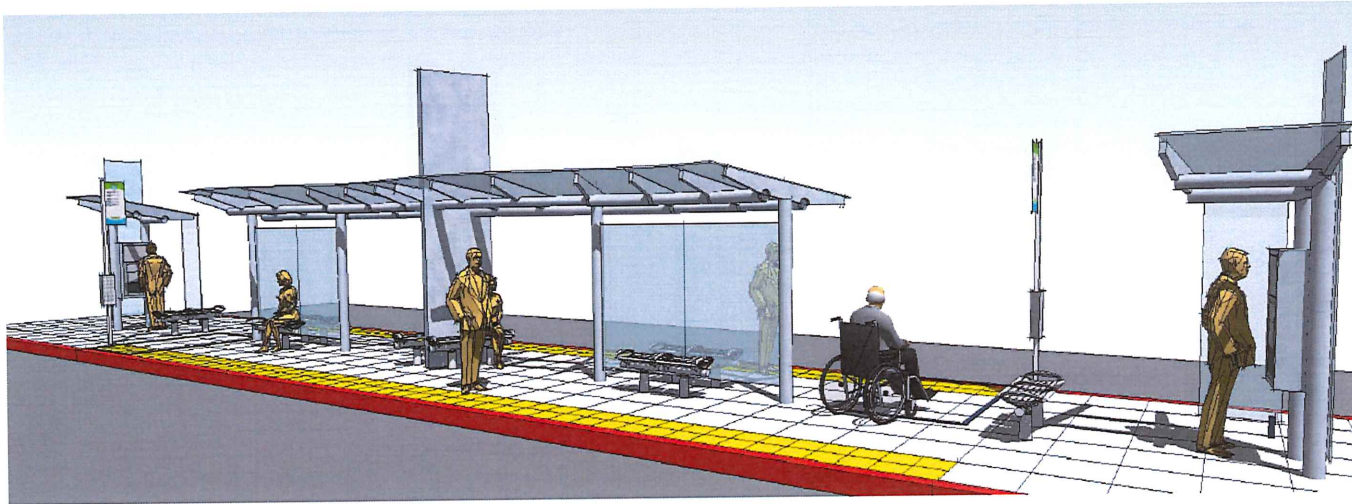
NOTE: The above diagram is a schematic representation of the proposed amenities and does not depict the actual design of the station for each typology.

Station Concepts

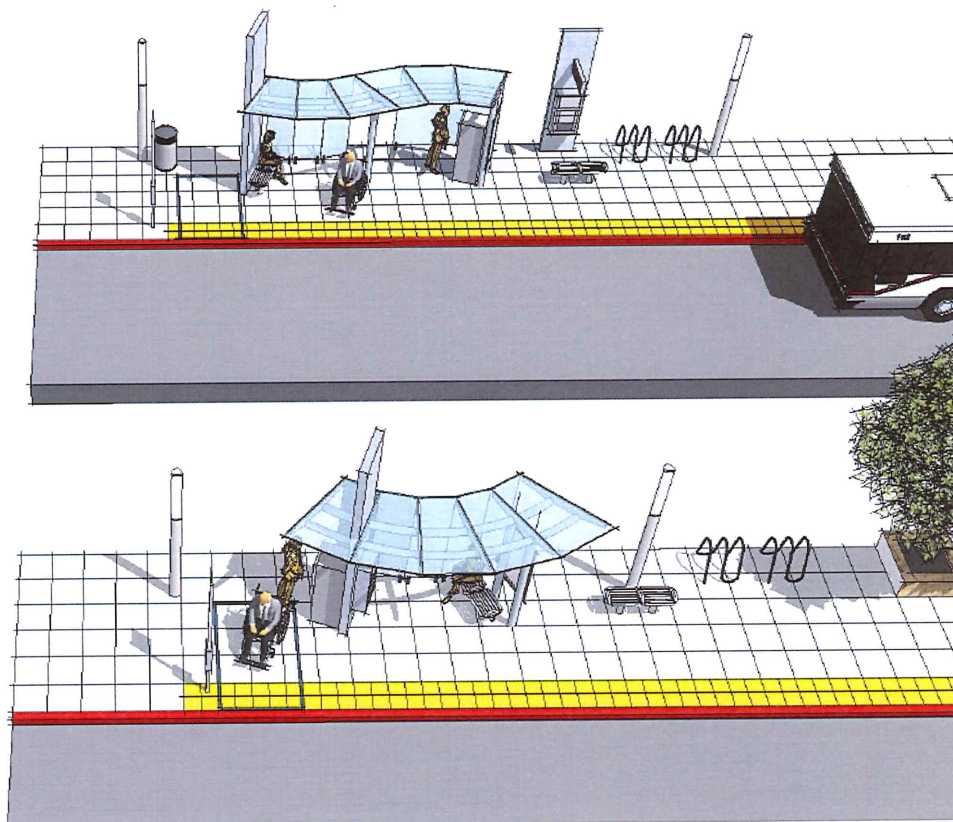
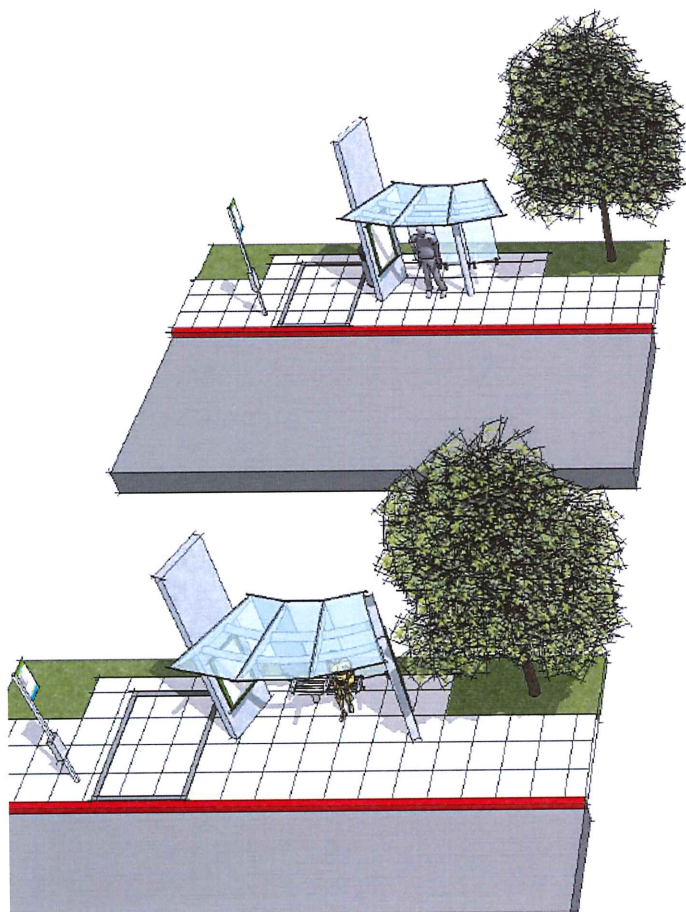
- Consultants have prepared three concepts
- Each concept includes variations depending on stop location, ridership, right of way, etc.
- Concepts to be vetted through STA and upcoming outreach events



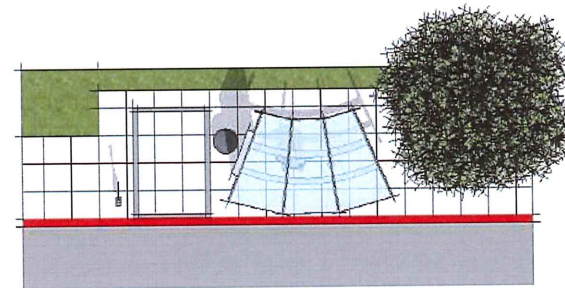
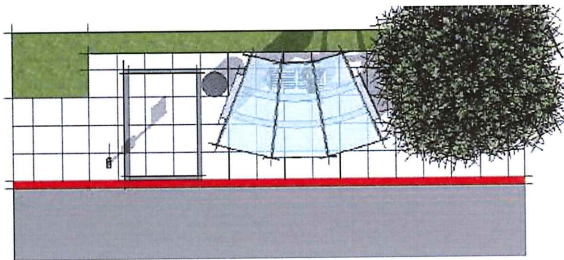
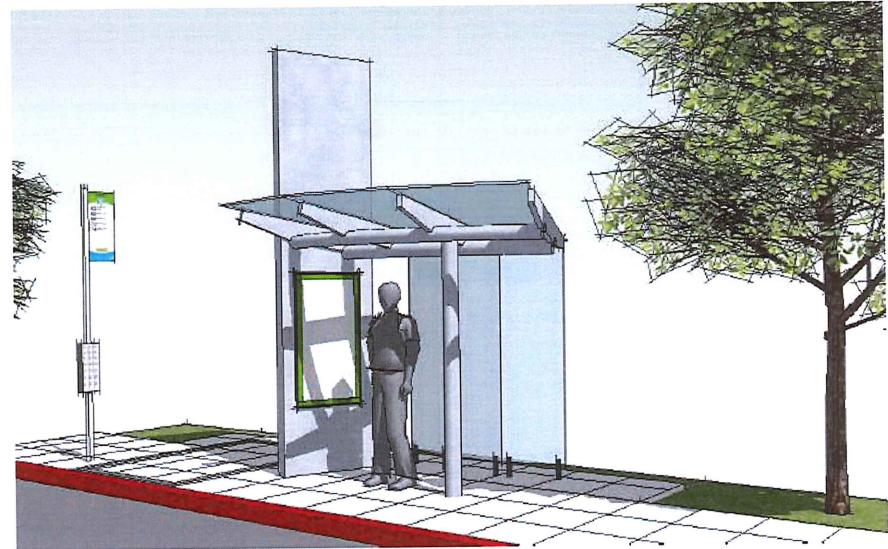
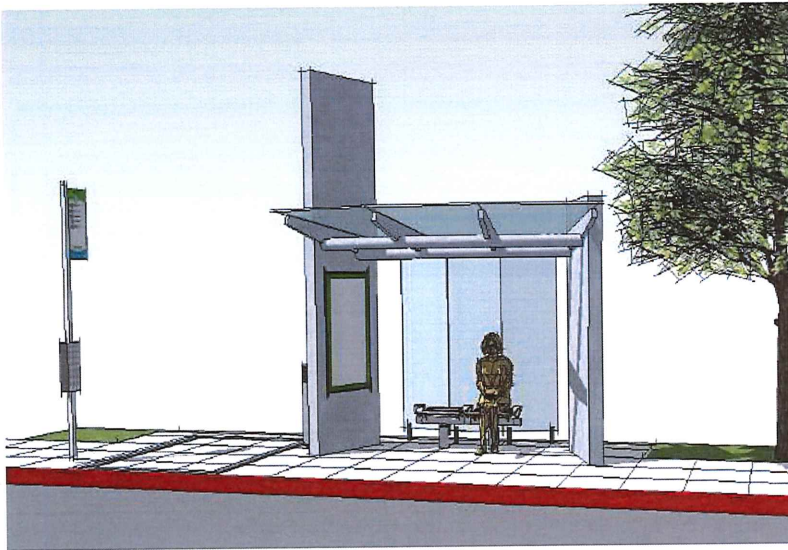
“Slice” Design



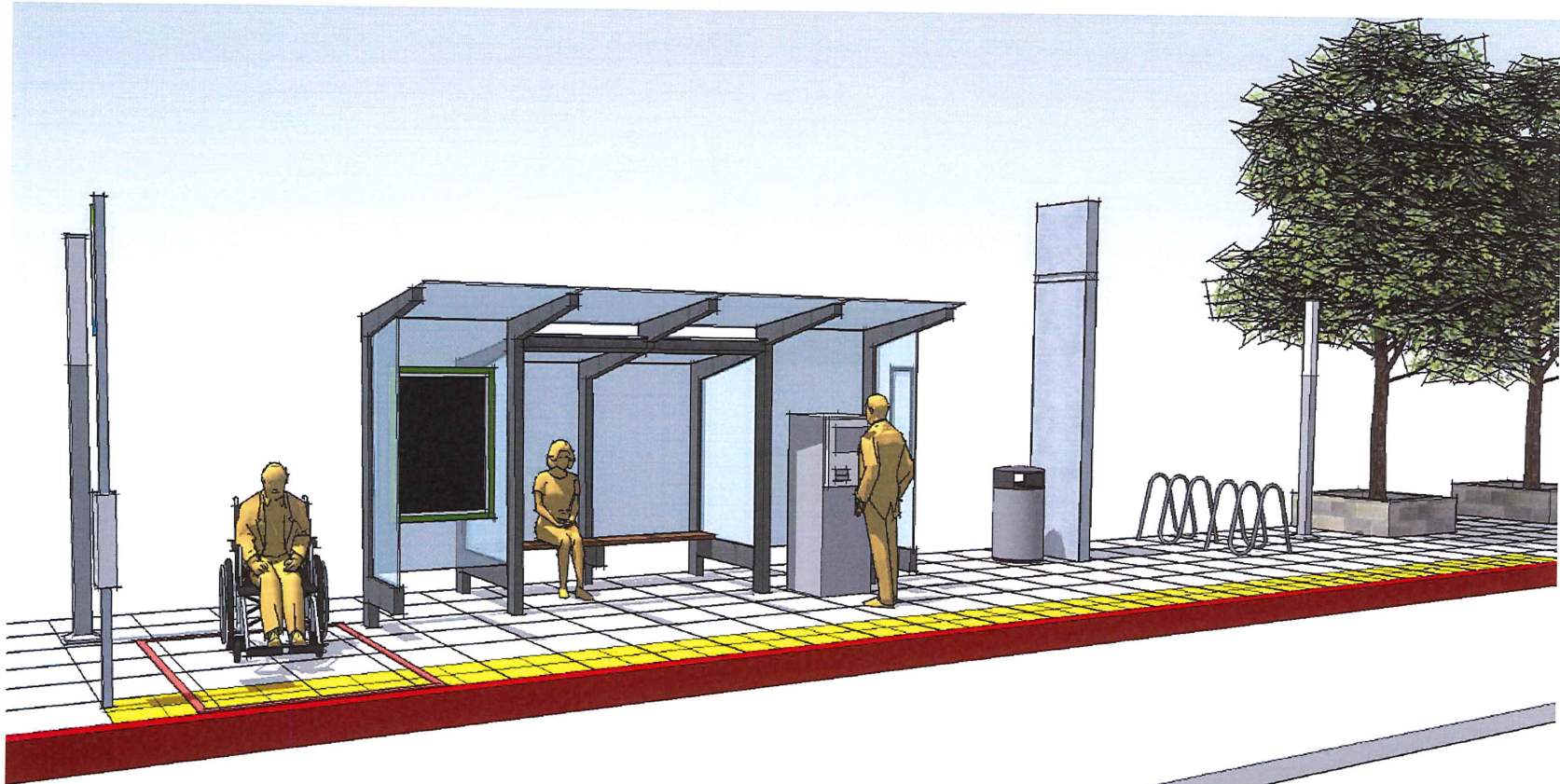
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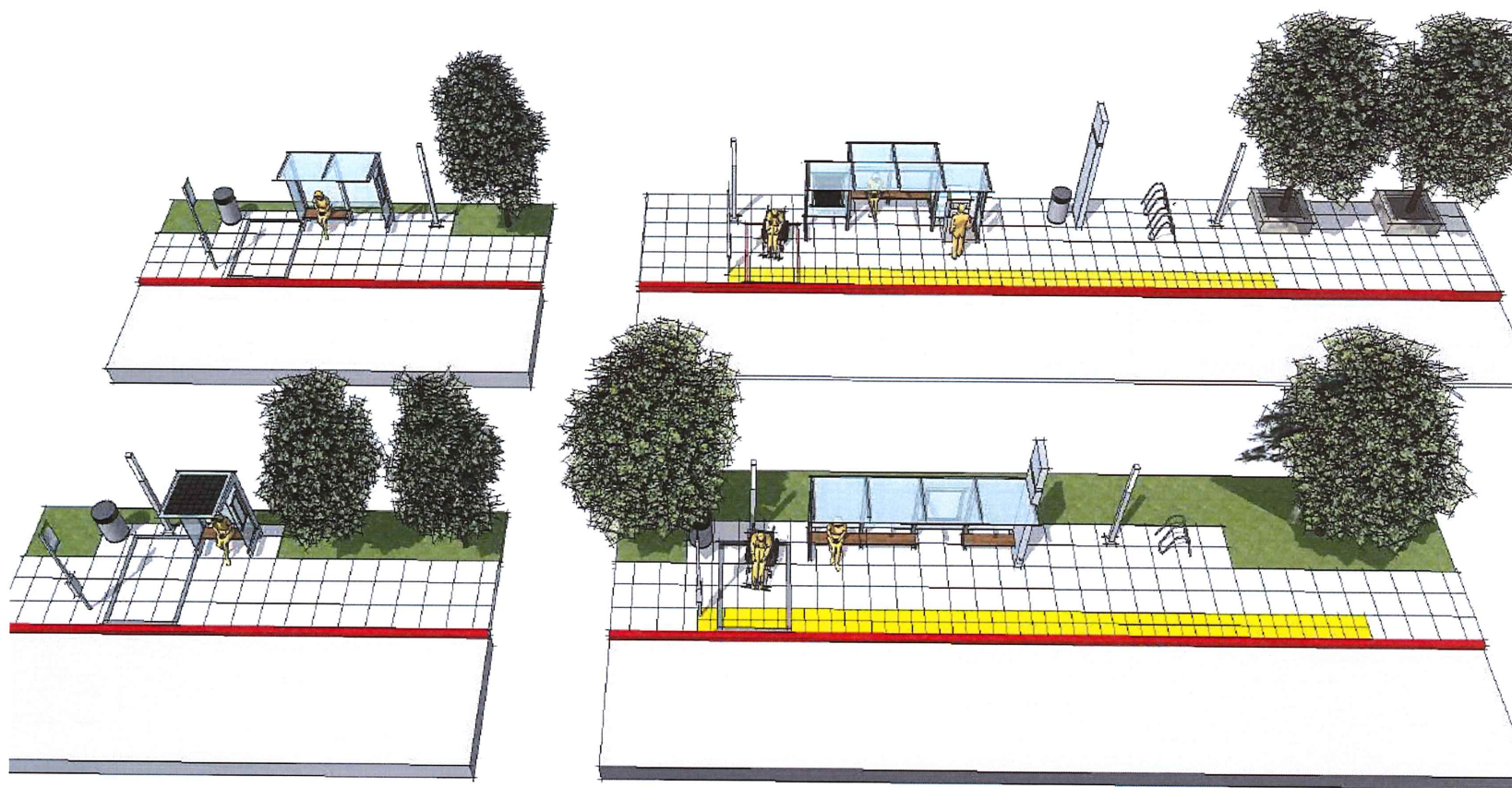
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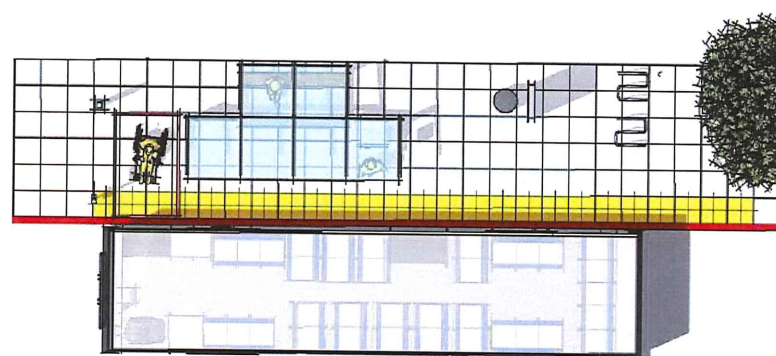
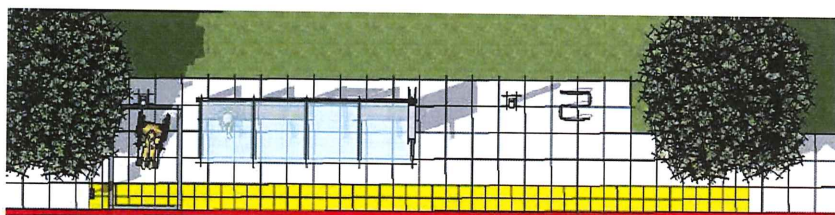
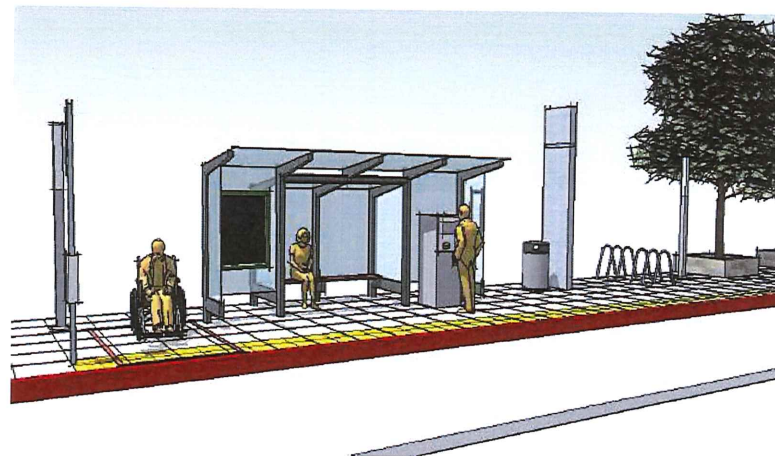
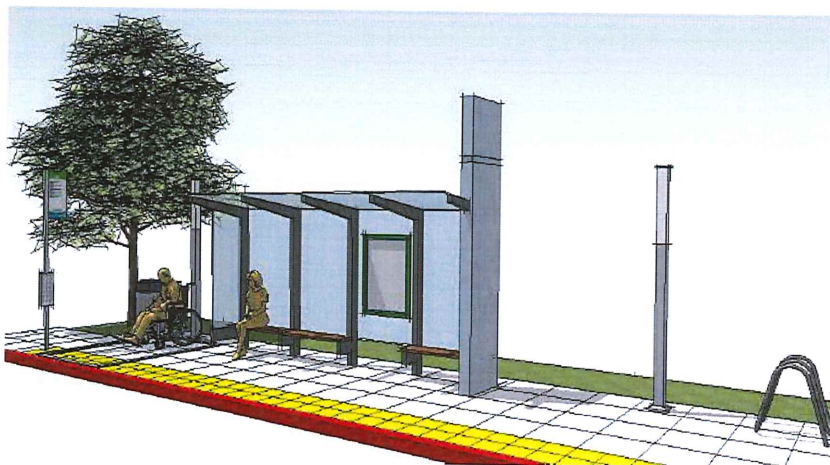
“Cantilever” Design



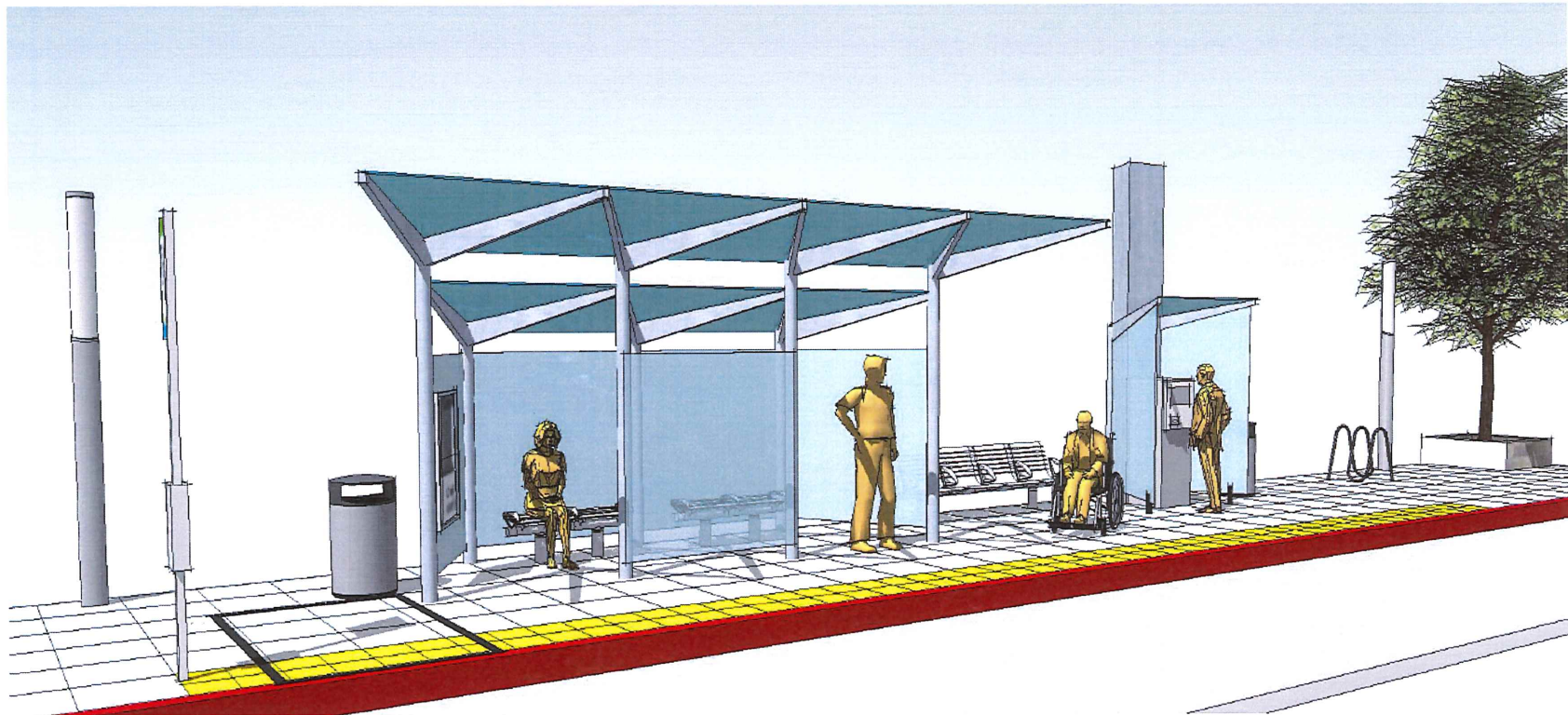
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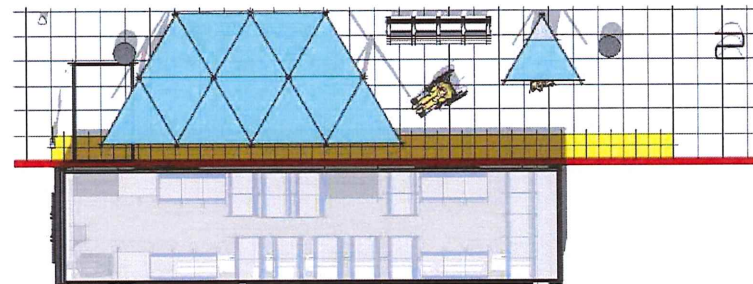
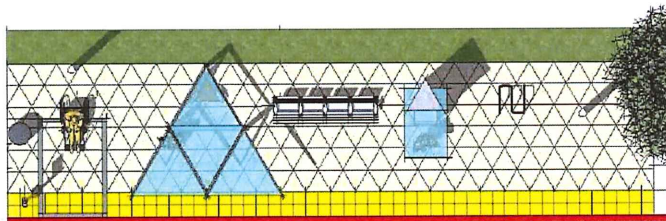
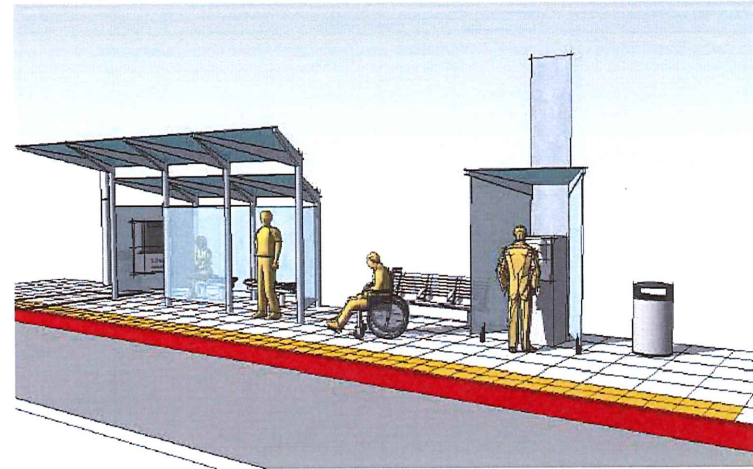
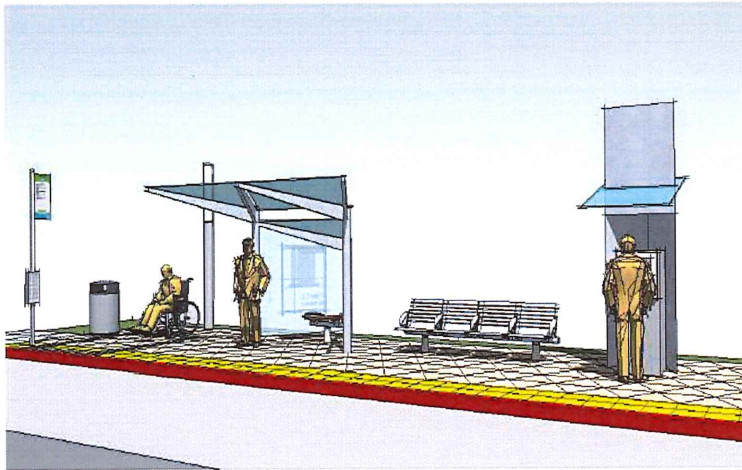
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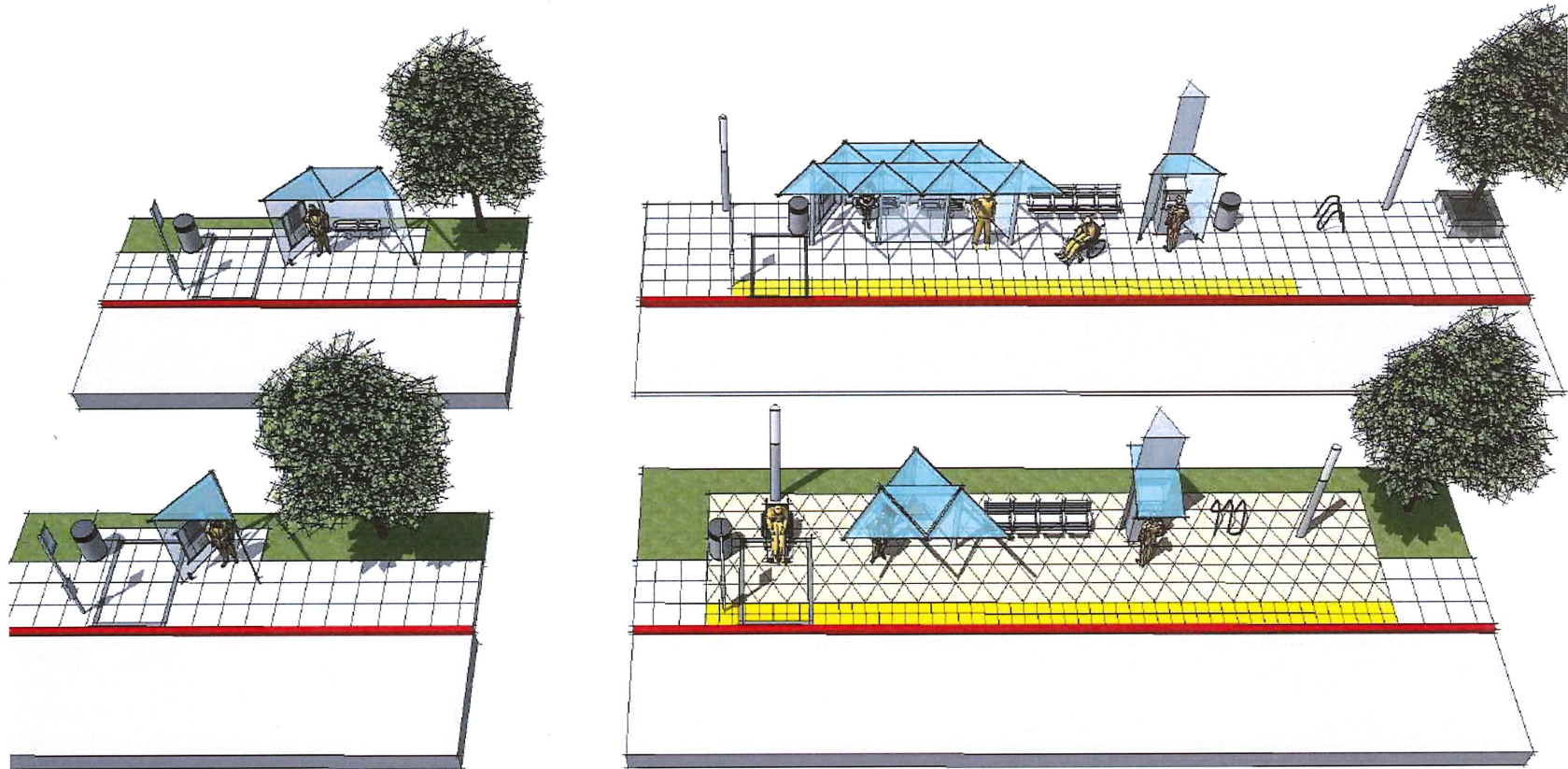
“Triangles” Design



“Triangles” Design



“Triangles” Design



Upcoming Outreach Events

- Focus Group testing on January 26 & 27
- Posting to mySidewalk on or before February 1
- Central City Line Steering Committee on February 1
- East Downtown/U-District Open House on February 2
- Additional downtown outreach events
- Neighborhood meetings January – March
- West Downtown/Browne's Addition Open House – March 1 (Tentative)

Project Timeline

January

- Focus Group Testing
- Manual Preparation

February

- Open houses
- Brown Bag Forums
- mySidewalk Outreach

March

- mySidewalk Outreach
- Finalize Manuals
- Present Branding for HPT Service

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2015

AGENDA ITEM 6A.1: REQUEST FOR SPECIAL 2016 COMMUNITY EVENTS FARE
STRUCTURE FOR VALLEYFEST

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Beth Bousley, Director of Communications and Customer Service
Steve Blaska, Director of Operations

SUMMARY: The decision regarding the Special Event Fare Structure for Valleyfest in 2016 was held in abeyance at the September 2015 Performance Monitoring and External Relations Committee meeting to allow staff to assess the impact of the additional measures taken to promote 2015 Valleyfest shuttle ridership. Below are the results and staff's recommendation to the Committee.

Background

The Board's philosophy has been that STA provided support to select special events as a show of support to the community. Bloomsday, Hoopfest, First Night, and Valleyfest were deemed to be of enough regional importance to warrant special public transit support. Not only did the community benefit, STA also got a marketing value in promoting our services.

The Board's support for these events has not been based on an expense/revenue basis. The fare structure has been based on some logical connection to our standard base fare. The logic for the change for First Night and Valleyfest was precipitated by the fact that we no longer have a standard fare that is \$0.75. However, this previously proposed increase from \$0.75 to \$1.50 for Valleyfest was a change that did increase the cost Valleyfest users would pay.

To further promote use of the 2015 Valleyfest shuttle service, STA teamed with Valleyfest and Coats4Kids in a promotion to "stuff the bus" with coats for children in need. Even with the extra media attention, ridership was flat, so STA was running mostly empty buses at a significant cost.

Our goals for a new Valleyfest fare structure are twofold:

- determine a fare rate and structure that is consistent with other STA rates and affordable for Valleyfest users
- increase ridership on the Valleyfest shuttle

Staff recommends offering Valleyfest shuttle service at 10 minute intervals (currently 15) at no charge to riders. This would be accomplished through a Valleyfest Universal Transit Access Program (UTAP), through which Valleyfest or a sponsor would commit to paying a Not to Exceed (NTE) fee of \$1,000, based on a fare of \$0.85 per customer.

Rationale for NTE of \$1,000:

- there were 857 riders in 2015, which would have resulted in \$728 (857 x \$0.85).
- the higher NTE allows STA to pursue a goal to increase ridership, while ensuring the sponsor only pays for actual ridership up to \$1,000.
- Coats4Kids is eager to partner again in 2016, which is a good foundation for promotions and increasing ridership.

Shown below are prior year statistics for selected special events:

Event	Year	Riders	Hours	STA Cost	Cost/Pass	Revenue	Farebox Return	Required Marketing Target Value
First Night	2012	4,382	47.4	\$ 5,380	\$ 1.28	\$ 2,191	41%	\$ 3,189
	2013	2,703	41.5	\$ 4,783	\$ 1.80	\$ 1,351	28%	\$ 3,432
	2014	2,521	43.5	\$ 5,046	\$ 2.00	\$ 1,890	37%	\$ 3,156
Valleyfest	2012	677	50.1	\$ 5,675	\$ 8.38	\$ 304	5%	\$ 5,371
	2013	514	50.0	\$ 5,763	\$ 11.21	\$ 231	4%	\$ 5,532
	2014	844	42.3	\$ 4,906	\$ 5.81	\$ 380	8%	\$ 4,526
	2015	857	43	\$ 5,022	\$ 5.86	\$ 386	8%	\$ 4,636
Bloomsday	2012	21,327	553.2	\$ 62,788	\$ 2.94	\$ 19,329	31%	\$ 43,459
	2013	20,537	545.6	\$ 62,880	\$ 3.06	\$ 18,777	30%	\$ 44,103
	2014	18,461	537.3	\$ 62,327	\$ 3.37	\$ 18,227	29%	\$ 44,100
	2015	18,071	485.4	\$ 56,306	\$ 3.16	\$ 17,025	30%	\$ 39,281
Hoopfest	2012	9,127	159.7	\$ 18,126	\$ 1.99	Not avail		
	2013	8,912	164.1	\$ 18,913	\$ 2.12	\$ 7,919	42%	\$ 10,994
	2014	5,775	176.2	\$ 20,439	\$ 3.54	\$ 9,597	47%	\$ 10,842
	2015	6,257	174.5	\$ 20,242	\$ 3.24	\$ 6,309	31%	\$ 13,933

Staff is asking the Committee to recommend the Board approve the implementation of a UTAP program for the 2016 Valleyfest event.

RECOMMENDATION TO COMMITTEE: Recommend the Board approve a Valleyfest Universal Transit Access Pass (UTAP) program through which Valleyfest, or Valleyfest's designated sponsor, would commit to paying a Not to Exceed (NTE) fee of \$1,000, based on an \$0.85 fare per customer.

COMMITTEE ACTION:

RECOMMENDATION TO BOARD:

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 6A.2 : 2016 Communications Plan

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Beth Bousley, Director of Communications and Customer Service

SUMMARY: The Spokane Transit Communications Plan for 2016 provides the following:

- National and local population growth and ridership trends and statistics
- Overview of organizational priorities
- Audience definition
- Communications objectives and strategies for 2016

Detailed information on the Plan for the upcoming year is attached.

RECOMMENDATION TO COMMITTEE: Approve the 2016 Communications Plan, which support the STA Priorities and the ultimate goal of increasing ridership and improving community perception.

COMMITTEE ACTION:

RECOMMENDATION TO BOARD:

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

2016 Communications Plan

Situation Analysis

Public transportation ridership has decreased locally and nationwide:

- STA fixed route ridership decreased 4.5% in 2015
- During the first 9 months of 2015:
- Bus ridership decreased nationally by 2.7%
- Average gas price was \$2.42, a 30% drop
- Trips taken on U.S. Public Transportation decreased 1.2% YOY
- Light rail ridership increased .3%; commuter rail ridership .2%; heavy rail .3%

Source: APTA

APTA President and CEO Michael Melaniphy forecasts a bright year ahead for public transit:

"Today, we have the strength and stability of a fully funded, five-year authorization. Ridership has declined only marginally (not anywhere close to 2008 levels when the price of gasoline was as low as it is today). Transit tax parity has become a permanent part of the tax code and tax credits have been extended to promote alternative fuels. More than 7 out of 10 transit-related ballot initiatives were approved because people know that where transit goes, communities grow."

Spokane population has increased 1.01% year over year, and Spokane County is expected to grow to 592,969 by 2040. The growth trends show a decline in households with children, and an increase in households without children and two workers households, and denser regional development. (Source U.S. Census, *Horizon 2040*). 58% of STA riders are between the age of 16-34, and 37% are students, indicating that STA should focus on establishing loyalty among younger audiences. (Source: *2015 STA Fixed Route Passenger Survey*.)

Trends also show that Spokane County is growing as a destination for visitors. In 2015, Spokane was voted #2 out of the top 10 Best American Riverfront Cities (USA TODAY), and 7 out of the 10 most efficient airports (*smartasset.com*). There was \$893 million in visitor spending in 2014, up \$27 million over 2013.

STA continues to be the leader among Washington State Urban Systems in providing the lowest cost per passenger for fixed route and paratransit, the highest passenger per hour for Paratransit, and the second highest passenger per hour for fixed route.

2016 Communication Objectives

The communication objectives are aligned with STA's Priorities with the ultimate goal of increasing ridership and improving community perception:

STA Priority	Communication Objective
Ensure Safety	▪ Enhance user education and information services
Earn and Retain the Community's Trust	▪ Enhance brand and identity ▪ Communicate/engage key audiences ▪ Improve/control STA image ▪ Improve online access to information
Provide Outstanding Customer Service	▪ Improve customer experience
Enable Organizational Development	▪ Improve internal communications
Exemplify Financial Stewardship	▪ Communicate financial information to demonstrate accountability and transparency

Audience

- **Riders, emphasizing**
 - Commuters, students, millennials, visitors/tourists
- **STA employees**
- **Community leaders and influencers:**
 - STA Board members, Citizen Advisory Committee members, employers, business leaders, neighborhood groups, community leaders and influencers
- **Taxpayers**
 - Prospective and Current Riders
 - Non-riders

OBJECTIVE 1: INCREASE STA BRAND AWARENESS AND AFFINITY AWARENESS AND AFFINITY

Strategies

- Define and build out STA brand (how STA creates and delivers value) including development/refinement of brand promise (what STA commits to the public) and guidelines (how it's used)
- Develop brand marketing/advertising strategy

Tactics

- Define and build out STA brand guidelines
- Develop brand marketing/advertising strategy including targeted paid media strategy, video, and digital strategy (social, web)

Metrics

- STA Priority
 - Increase the mean score for: Does STA do a good job of listening to the public - score 4.5 out of 5
- Communications
 - Complete revised branding guidelines and brand marketing program

OBJECTIVE 2: IMPROVE INTERNAL COMMUNICATIONS

Strategies

- Ensure employees understand and are invested in STA

Tactics

- Continue to test and refine communication/feedback tools
- Improve quality of employee engagement survey

Metrics

- STA Priority
 - Increase employee satisfaction as ranked on the employee engagement survey to 85%
- Communications
 - Implement revised employee engagement survey
 - Implement revised feedback and communications tools

OBJECTIVE 3: ENHANCE USER EDUCATION AND INFORMATION SERVICES

Strategies

- Improve public education
- Simplify use of STA Services

Tactics

- Test/implement new methods to help potential and current riders understand how to use our services, such as video series, social media, information kiosks

- Support implementation of mobility mentor program; conduct bus demonstrations and events, targeting younger audiences to develop brand loyalty
- Ensure that information is placed throughout the STA system to help all riders navigate with ease; phasing in digital tools and leveraging Real Time information
- Implement Courtesy Campaign

Metrics

- STA Priority
 - Community Trust: Increase STA Community Perception mean score rating to 4.5 on 5 point scale for the question “Does a good job of listening to the public”
 - Safety: Improve rating: freedom from obnoxious behavior from 3.76
- Communication Goals
 - Implement two new digital tools and 6 demos/events
 - Support implementation of mobility mentor program

OBJECTIVE 4: IMPROVE COMMUNICATION AND ENGAGEMENT WITH PRIORITY AUDIENCES

Strategies

- Develop external communication strategy
- Continue to build relationships; leverage opportunities with strategic partners
- Identify and empower advocates
- Create targeted marketing campaigns for key programs and audiences

Tactics

- Create targeted marketing campaigns for the Universal Transit Access Pass (UTAP), the Employee Sponsored Bus Pass (ESBP), and Vanpool
- Implement advertising program highlighting STA’s 35th anniversary
- Implement Destination campaign: Spokesman Neighborhood Connect, Spokane County Parks partnership
- Implement promotion for Real Time information
- Implement monthly community newsletter
- Provide engaging and entertaining events at the Plaza

Metrics

- STA Priority
 - Increase STA Community Perception mean score rating to 4.5 on 5 point scale for the question “Does a good job of listening to the public”
 - Increase ridership
- Communications
 - Increase participation in UTAP, ESBP, and Vanpool,
 - Real Time Information engagement
 - Implementation of newsletter

OBJECTIVE 5: IMPROVE AND CONTROL IMAGE OF STA

Strategies

- Improve public understanding of STA initiatives through outreach and communications
- Improve public perception of STA leadership and Board

Tactics

- Engage in consistent media relations/editorial board outreach/media tours
- Conduct Public outreach: plaza renovation, Central City Line and High Performance Transit (HPT), Real Time Information, Fare Analysis, STA Moving Forward
- Engage media to develop transit focused series to celebrate 35th anniversary
- Implement media training for STA leadership and Board; identify speaker opportunities

- Develop consistent talking points for STA speakers

Metrics

- Support STA Goals
 - Increase STA Community Perception mean score rating to 4.5 on 5 point scale for the question “Does a good job of listening to the public”
- Communications Goals
 - Implementation of media training and speakers opportunities
 - Implementation of media tours
 - Implementation of public outreach

OBJECTIVE 6: IMPROVE CUSTOMER EXPERIENCE

Strategies

- Improve quality and responsiveness of customer service
- Ensure customers feel valued by enabling them to provide both positive and negative feedback

Tactics

- Implement customer service training
- Equip customer service reps to serve as travel ambassadors, proactively helping customer navigate the system
- Provide comment cards, passenger surveys; online contact methods: email, website, comment form, social media, electronic kiosks

Metrics

- Support STA Goals
 - Increase STA Community Perception mean score rating to 4.5 on 5 point scale for the question “Does a good job of listening to the public”
- Customer Service Goals
 - Increase excellent, professional and courteous Quality Counts! Score to 5 on a scale of 1 to 5 (Standard: 4.5 average); meet service goal of 90% of calls answered in < 30 seconds, abandon rate of < 4%
 - Conduct two training sessions, implement travel ambassador pilot, test 1 new method for feedback

OBJECTIVE 7: IMPROVE ONLINE ACCESS TO INFORMATION

Strategies

- Facilitate and enhance access to online information
- Leverage social media to gather feedback, reach new audiences, promote closer relationships with customers
- Enable the development of online tools and applications
- Facilitate online payment mechanisms

Tactics

- Continue to improve quality of the website
- Implement social media strategy including editorial calendar and video series to educate the public on how to ride the bus, key events, important dates, and fun trivia
- Promote Real Time information and provide operational data to the public and developers to fuel the development of applications
- Continue enhancement of online payment mechanisms such as the vanpool payment center and the STA online store

Metrics

- Support STA Goals
 - Increase STA Community Perception mean score rating to 4.5 on 5 point scale for the question “Does a good job of listening to the public”
- Communication Goals
 - Increase Facebook engagement, web traffic, Real Time Information engagement

- Increase online payments
- Establish 3rd party app development

OBJECTIVE 8: COMMUNICATE FINANCIAL INFORMATION TO DEMONSTRATE TRANSPARENCY AND ACCOUNTABILITY

Strategies

- Communicate financial information to the public in effective and timely manner

Tactics

- Update financial performance metrics on the website as they become available
- Facilitate communication of financial budget through presentations, website, press releases, as appropriate

Metrics

- Support STA Goals
 - Improve public perception of financial responsibility towards standard of 4.5 (3.54 in 2014 Community Perception survey)
- Communication Goals
 - Timely communication of financial information including performance metrics and budget

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 6B.1 : FARE ANALYSIS PUBLIC OUTREACH PLAN - OVERVIEW

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Beth Bousley, Director of Communications and Customer Service

SUMMARY: Our sustainable plan for the next 6 years requires a minimum farebox recovery of 20%. Subject to STA Board approval, STA intends to implement a fare increase in July, 2017. This document provides an overview of the public outreach plan that will be implemented to ensure input from key stakeholders to the preliminary fare proposal before it is finalized.

BACKGROUND: STA evaluates its fares on a periodic basis. The last major review of its fare structure was conducted in 2009, which resulted in a phase-in of fare changes for the years 2010, 2011, and 2012. As part of the fare change process, public outreach will be conducted to ensure stakeholder participation.

OBJECTIVE: Gather input to the fare increase proposal from stakeholders who represent the residents of the Spokane County Public Transportation Benefit Area (PTBA). Create opportunities for public input from key stakeholders.

RECOMMENDATION TO COMMITTEE: Recommend the Board approve the Fare Analysis Public Outreach Plan.

COMMITTEE ACTION:

RECOMMENDATION TO BOARD:

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY

Date: February 3, 2016

SUBJECT: FARE ANALYSIS– PUBLIC OUTREACH PLAN - OVERVIEW

Public Outreach Period: March 2016 – July 2016

Summary: Our sustainable plan for the next 6 years requires a minimum farebox recovery of 20%. Subject to STA Board approval, STA intends to implement a Fare Increase in July, 2017. This document provides an overview of the public outreach plan that will be implemented to ensure input from key stakeholders to the preliminary fare proposal before it is finalized.

Background

STA evaluates its fares on a periodic basis. The last major review of its fare structure was conducted in 2009 which resulted in a phase-in of fare changes for the years 2010, 2011, and 2012. As part of the fare change process, public outreach will be conducted to ensure stakeholder participation and to comply with Title VI requirements which state that during major service reductions and fare increases, STA will conduct an analysis to verify that no discrimination to protected classes takes place. Title VI of the Civil Rights Act provides that “no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.”

Objective

Gather input to the fare increase proposal from stakeholders who represent the residents of the Spokane County Public Transportation Benefit Area (PTBA). Create opportunities for public input from key stakeholders.

Strategies

Create opportunities for public input from key stakeholders.

Collateral

Fare Analysis Fact Sheet and FAQ for use in presentations, meetings, on website

Feedback Mechanism?

Survey?

Press Release

Social media – visual that quickly shows how we’re funded and why we’re raising fares

Messaging

Simple, consistent - process - draft to directors for input, developed by Communications.

Audience	Tactic
General public	Social media, press release
Title VI	Present at advocacy/representative member group meetings, engage social service agencies that serve target groups, tactics to reach other audiences will also serve to reach these groups.
Riders	Bulkheads, Plaza Open House, Website
Non-Riders	Traditional media/press release announcing Fare Analysis Open House at Plaza
Neighborhoods	Community Assembly
Social service agencies	ARC, Catholic Charities, Union Gospel Mission, Valley Support Network
Employers	DSP, GSI, GSVC, West Plains Chamber

Educational Institutions	University District, Non-UTAP Schools
STA CAC	CAC Meetings, member networks; equip members with fare analysis fact sheet to share with network
STA Employees	All employee meeting, STA Informed
Elected Officials	City Council Meetings, Board of County Commissioners
Advocacy Agencies	Spokane Alliance, Valley Support Network, Independent Living, Aging and Long Term Care of Eastern Washington (ALTCEW)
Faith Community	Variety of churches across the region
Limited English Proficiency	Organizations and churches serving those with limited English proficiency, such as Slavic Churches

Performance Metrics:

In-person outreach to 25 organizations
Regional Open Houses (3 - 10-20 people at each)
Media (print and radio)
Social Media impressions
1 Press release

Tactics and Timing Overview

- **January**
 - Finalize key stakeholder list
 - Create schedule of public outreach events to attend/schedule in March-May, including:
 - community meetings
 - presentations to key stakeholder groups
 - one on one meetings
 - Begin developing supporting materials
- **February**
 - Finalize messaging and develop supporting materials once Preliminary Proposal is drafted:
 - Social media schedule
 - Printed materials
 - Presentations
 - Email blasts, letters and invitations to public outreach events
 - Posters on buses, shelters and transit centers
- **March-May**
 - Implement public outreach
 - Gather and finalize input
- **June**
 - Hold public hearing on draft of final fare increase plan at June 16th STA Board Meeting
- **July**
 - Final recommendation for Board decision at July 21st Board Meeting

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 7: CEO REPORT

REFERRAL COMMITTEE: N/A

SUBMITTED BY: N/A

SUMMARY: At this time, the CEO will have an opportunity to comment on various topics of interest regarding Spokane Transit.

RECOMMENDATION TO COMMITTEE: N/A

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIOS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8A : JANUARY 2016 SALES TAX REVENUE INFORMATION

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Lynda Warren, Director of Finance & Information Services
Lynn Holmes, Financial Services Manager
Tammy Johnston, Budget and Accounting Manager

Attached is January 2016 sales tax revenue information.

January sales tax revenue, which represents sales for November 2015, was:

+4.5% over January 2015 actual
+4.4% YTD above budget
+4.5% above YTD actual

RECOMMENDATION TO COMMITTEE: Information only.

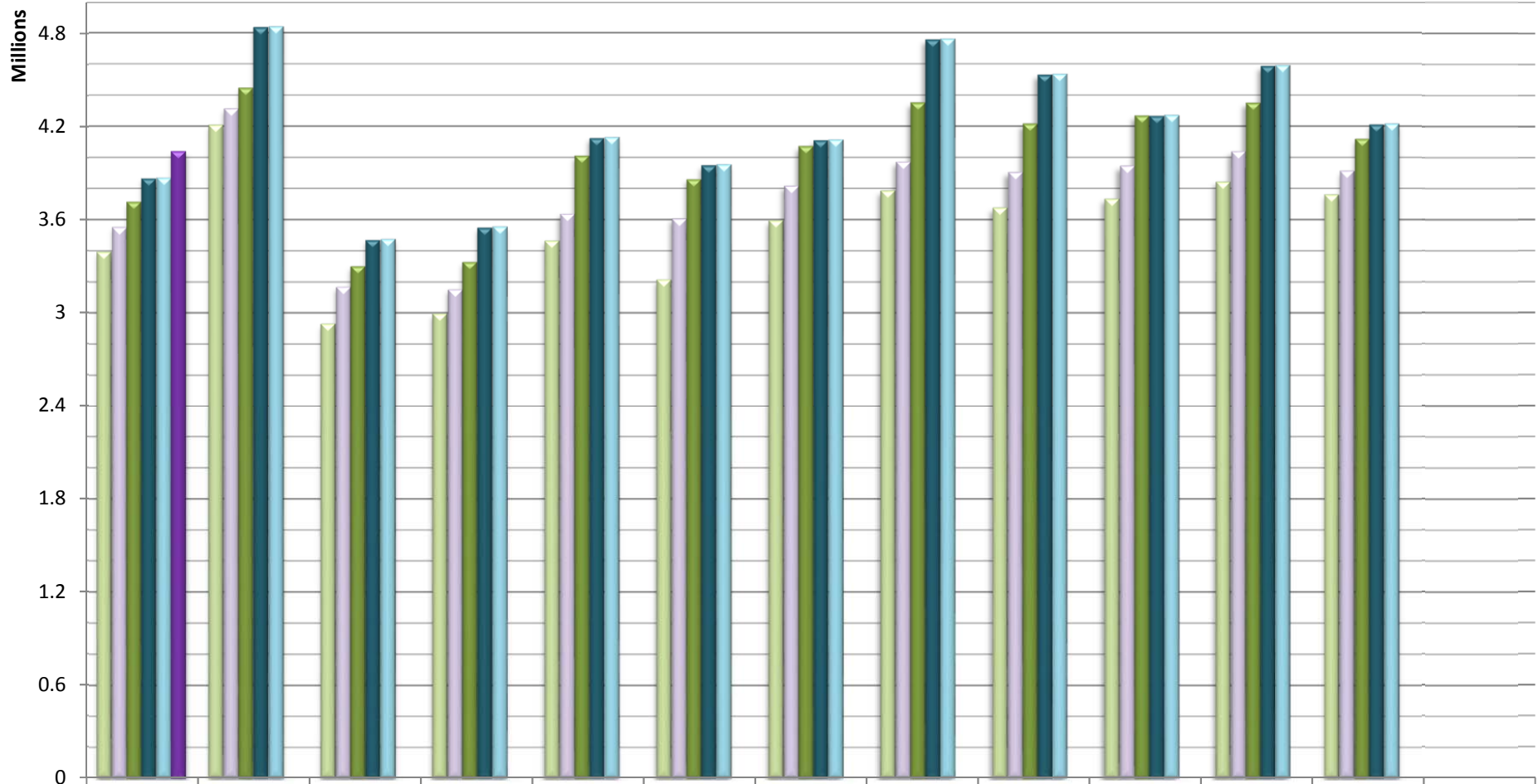
FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

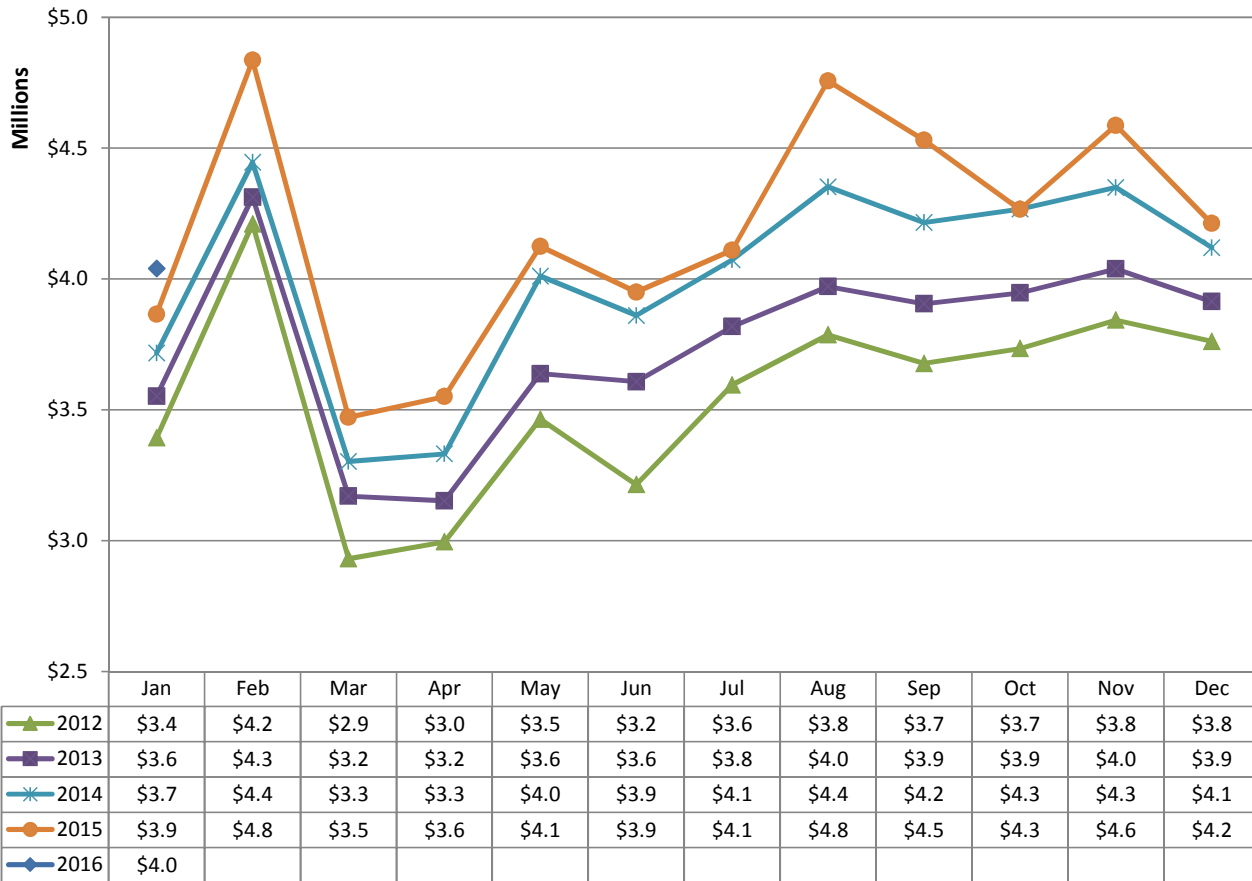
2012 - 2016 SALES TAX RECEIPTS ⁽¹⁾



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2012 Act.	3,393,162	4,210,587	2,931,140	2,995,322	3,464,079	3,214,084	3,595,195	3,786,787	3,677,285	3,733,831	3,842,726	3,761,526	42,605,722
2013 Act.	3,552,629	4,313,315	3,170,287	3,152,776	3,638,110	3,607,445	3,818,364	3,971,379	3,905,284	3,946,531	4,038,362	3,913,617	45,028,101
2014 Act.	3,717,183	4,445,759	3,303,019	3,331,820	4,010,737	3,860,469	4,073,091	4,352,108	4,215,907	4,267,406	4,349,765	4,119,702	48,046,965
2015 Act.	3,865,250	4,835,478	3,471,459	3,550,797	4,124,484	3,949,801	4,109,906	4,756,705	4,530,359	4,265,975	4,587,132	4,211,936	50,259,282
2016 Bud.	3,869,575	4,840,888	3,475,344	3,554,771	4,129,100	3,954,221	4,114,505	4,762,028	4,535,428	4,270,749	4,592,265	4,216,648	50,315,522
2016 Act.	4,040,342	-	-	-	-	-	-	-	-	-	-	-	-
\$ Mo. Var.	175,092	-	-	-	-	-	-	-	-	-	-	-	-
% Mo. Var.	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-
\$ YTD Var.	175,092	-	-	-	-	-	-	-	-	-	-	-	-
% YTD Var.	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-
% YTD Bud. Var.	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-

⁽¹⁾ Sales tax distributions lag two months after collection. For example, collection of January taxable sales are distributed in March.

Sales Tax Revenue History-January 2016⁽¹⁾



(1) Sales tax distributions lag two months after collection by the state. For example, collection of January taxable sales are distributed in March.

Sales Tax Summary (with Mitigation for All Jurisdictions)				
January 2016				
	YTD 2015	YTD 2016	\$ CHANGE	% CHANGE
CHENEY	88,619	108,125	19,506	22.0%
LIBERTY LAKE	165,532	195,992	30,460	18.4%
MILLWOOD	\$ 32,533	\$ 37,305	\$ 4,772	14.7%
MEDICAL LAKE	19,678	20,992	1,315	6.7%
SPOKANE COUNTY	1,755,224	1,854,514	99,290	5.7%
PFD	683,390	715,591	32,201	4.7%
STA	3,865,250	4,040,342	175,092	4.5%
SPOKANE VALLEY	1,383,596	1,441,904	58,308	4.2%
SPOKANE	3,201,827	3,297,152	95,325	3.0%
AIRWAY HEIGHTS	139,492	129,256	(10,235)	-7.3%
ALL	\$ 11,335,141	\$ 11,841,173	\$ 506,032	4.5%

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8B : NOVEMBER 2015 OPERATING INDICATORS

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Steve Blaska, Director of Operations
Karl Otterstrom, Director of Planning

SUMMARY: November 2015 had one more weekday than November 2014.

FIXED ROUTE

Average weekday ridership decreased 10.6% (36,240 vs. 40,542 in November 2014) and is down 4.6% (37,428 vs. 39,235) YTD. Total ridership decreased 7.2% (840,007 vs. 904,934 in November 2014) and is down 4.4% (9,982,041 vs. 10,441,016) YTD. The ridership goal for 2015 is 0.5% growth.

- Adult ridership decreased 7.9% (525,033 vs. 569,927 in November 2014) and is down 5.6% (6,247,677 vs. 6,618,989) YTD.
- Youth ridership decreased 7.6% (47,339 vs. 51,238 in November 2014), and is down 1.1% (615,730 vs. 622,411) YTD.
- Reduced Fare/Para ridership increased 1.6% (111,144 vs. 109,350 in November 2014), and is up 2.4% (1,361,439 vs. 1,329,391) YTD.
- UTAP program ridership decreased 15.9% (158,939 vs. 189,091 in November 2014) and is down 11.3% (1,590,153 vs. 1,792,859) YTD.
 - CCS Pass program ridership decreased 21.1% (65,535 vs. 83,038 in November 2014), and is down 9.9% (678,898 vs. 753,676) YTD.
 - Eagle Pass ridership decreased 13.0% (82,451 vs. 94,788 in November 2014), and is down 14.2% (776,202 vs. 905,007) YTD.
 - GU Bulldogs Pass ridership totaled 4,650 riders for November and 10,410 YTD.

PARATRANSIT

Monthly ridership decreased 6.7% (34,438 vs. 36,908 in November 2014) and is down 2.1% YTD (427,788 vs. 437,005 in 2014). The decrease in November's ridership may be partially attributable to the November 17th windstorm and subsequent power outages at many locations. The decrease in the YTD numbers is partially attributable to the combined effect of the Mobility Training program and the ability of some customers to use the fixed route system for some trips. The 2015 ridership goal is to maintain 2014 ridership.

VANPOOL

Vanpool customer trips were down by 11.1%, (16,241 vs 18,265 in November 2014) and down 10.7% (202,397 vs. 226,532 YTD.) The decline in ridership year over year is attributed to fewer riders taking fewer active trips. The 2015 ridership goal is a 7% increase over 2014; however, now our objective for 2015 is to stabilize ridership and return to year end 2014 ridership of 240,194 by the end of 2015.

CUSTOMER SERVICE

Total monthly pass sales were up 26.1% (11,484 vs. 9,109 in 2014). YTD sales were down 6.8% (108,167 vs. 116,018 in 2014). The decline in sales is attributed to smaller purchases by Safeway, Career Path Services, and DSHS.

Adult Pass/Smartcard sales increased 50.6% (5,708 vs. 9,791 in November 2014). YTD sales were down 3.6% (47,829 vs. 49,609 in 2014).

- ESBP sales decreased 28.5% (776 vs. 1,085 in November 2014), largely due to fewer purchases by Group Health, Davenport Hotel, WA Trust Bank, and Travelers. YTD sales decreased 23.4% (9,604 vs. 12,545 in 2014).

Student Pass sales decreased 31.1% (166 vs. 241 in November 2014). YTD Student Pass sales decreased 21.6% (1,888 vs. 2,409 in 2014). Decreases are attributed to universities converting to the UTAP program.

Youth Pass/Smartcard monthly sales increased 65.9% (2,117 vs. 1,276 in November 2014) primarily due to increased purchases from Rosauer's, District 81, SMS, and DSHS. YTD sales decreased 4.6% (15,930 vs. 16,698 in 2014).

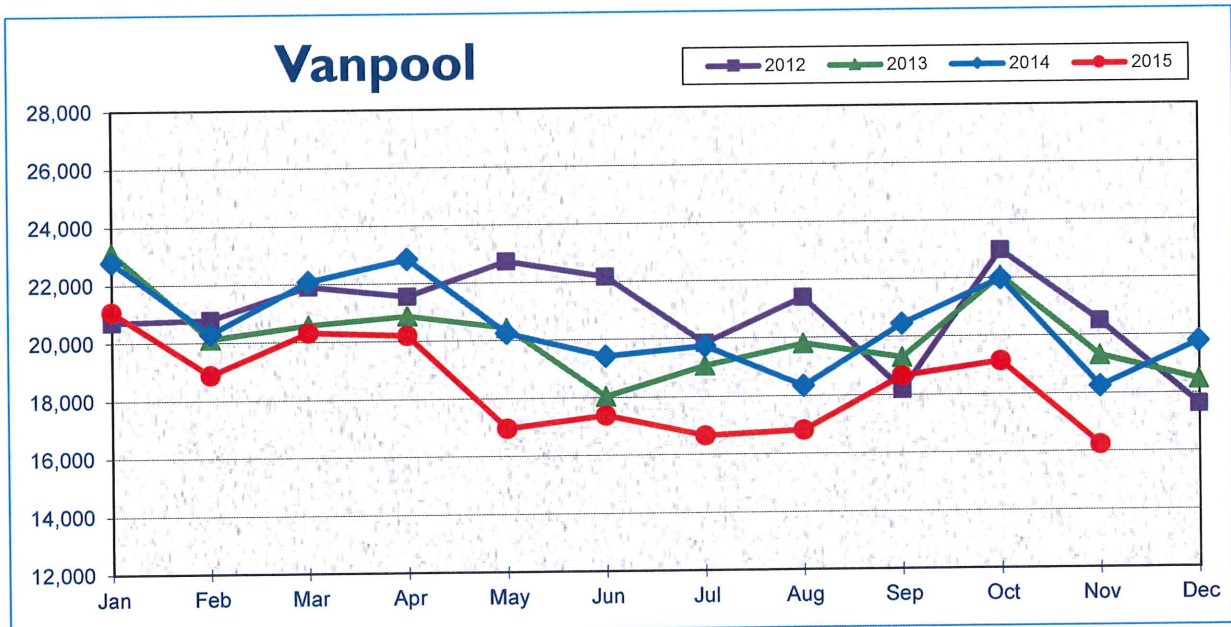
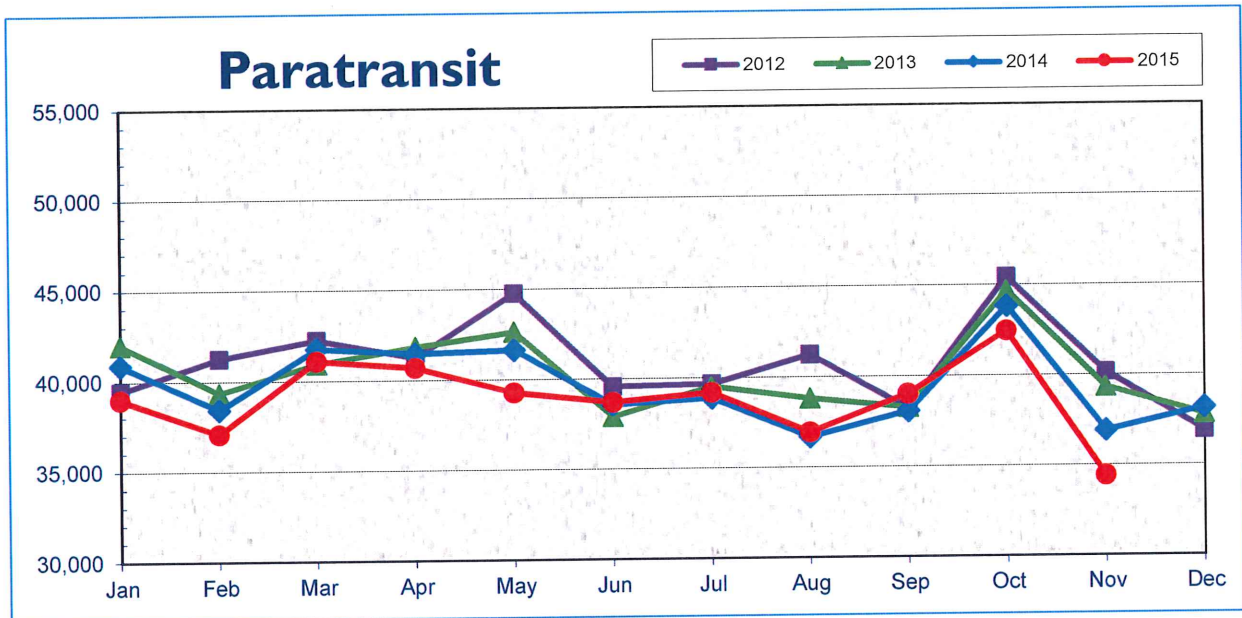
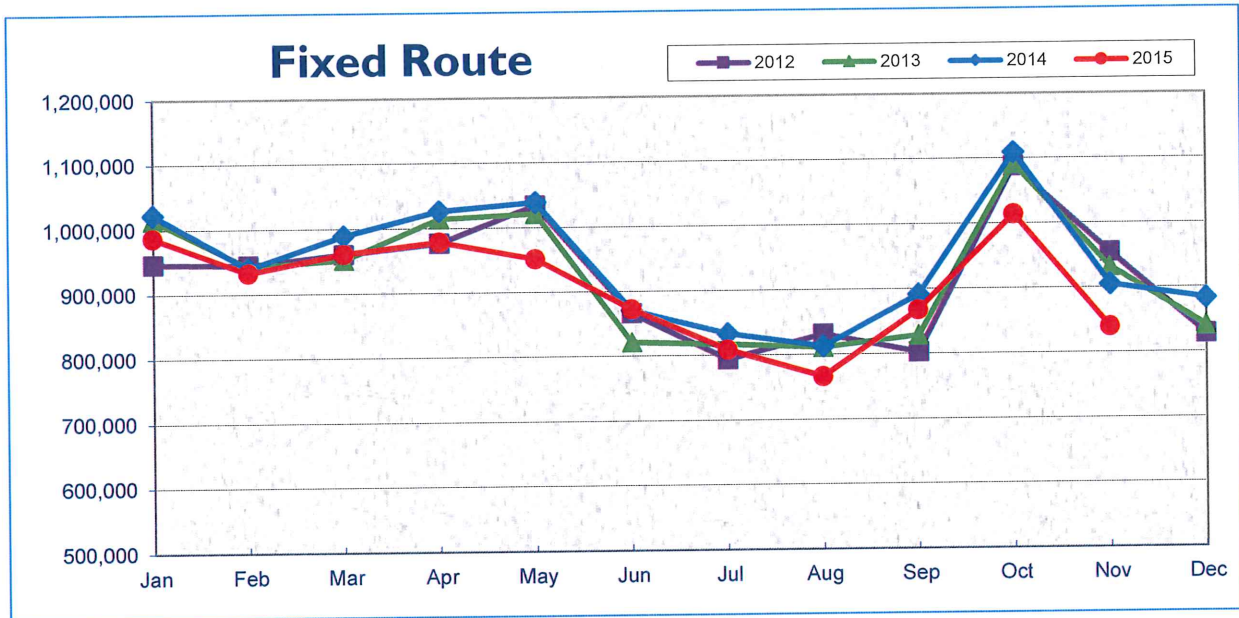
Reduced Fare Pass/Smartcard monthly sales increased 7.0% (1,521 vs. 1,422 in November 2014) due to increased purchases by Safeway, SMS, and District 81. YTD sales decreased 6.9% (19,799 vs. 21,264 in 2014).

RECOMMENDATION TO COMMITTEE: Information only.

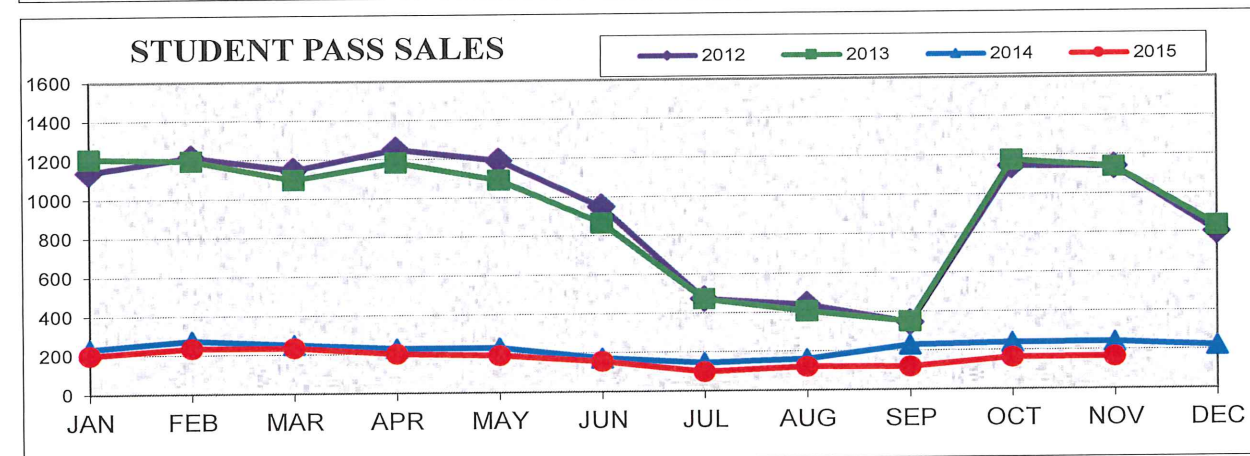
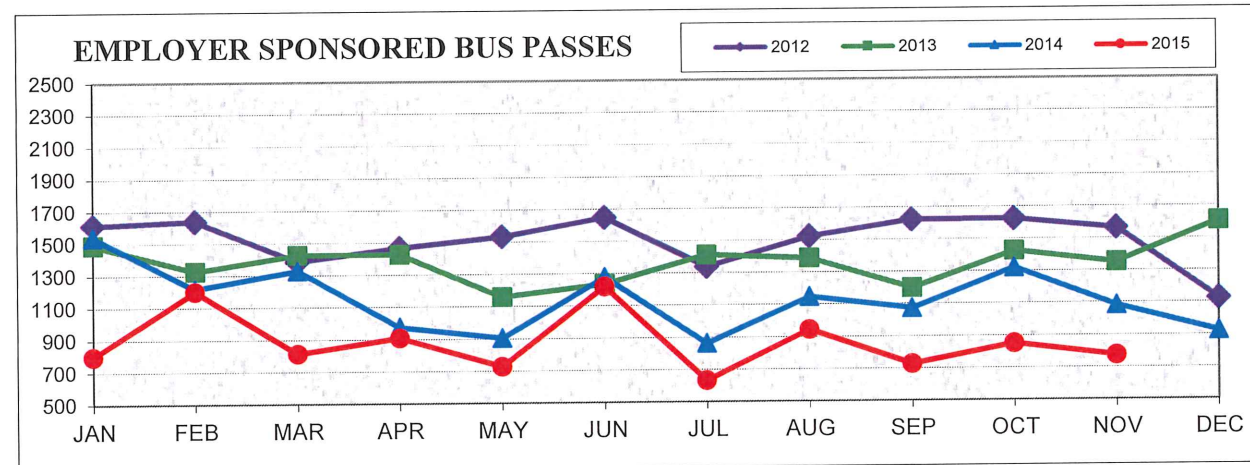
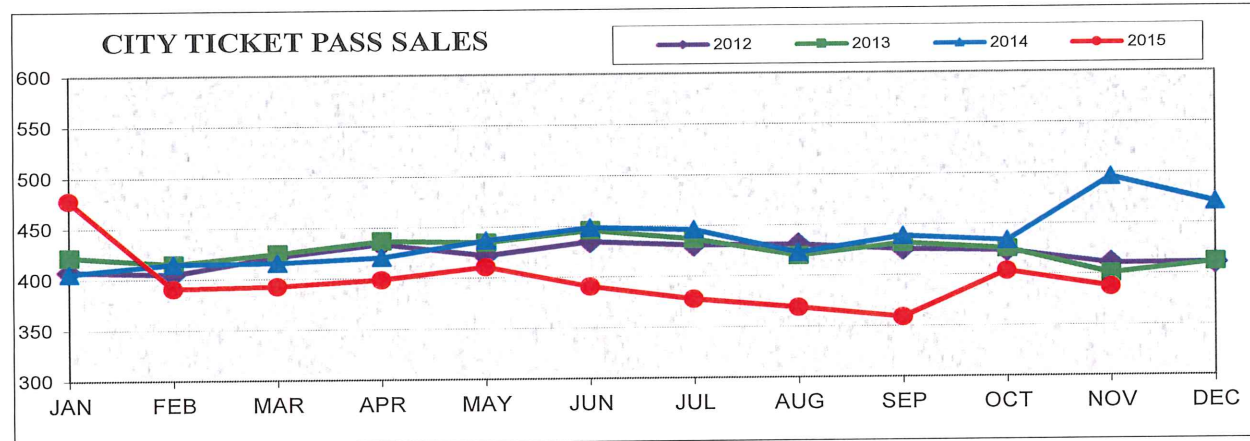
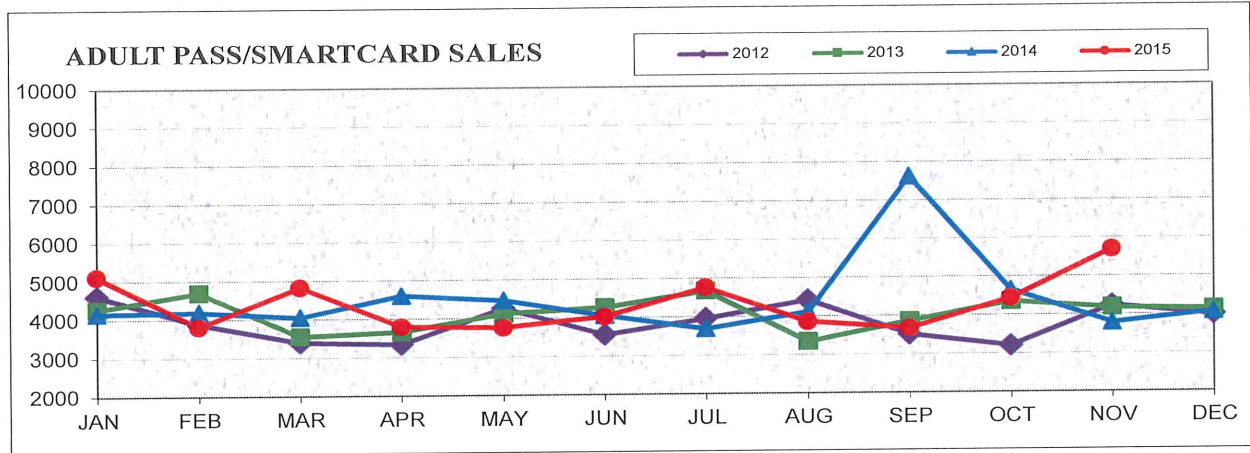
FINAL REVIEW FOR BOARD BY:

Division Head _____ Chief Executive Officer _____ Legal Counsel _____

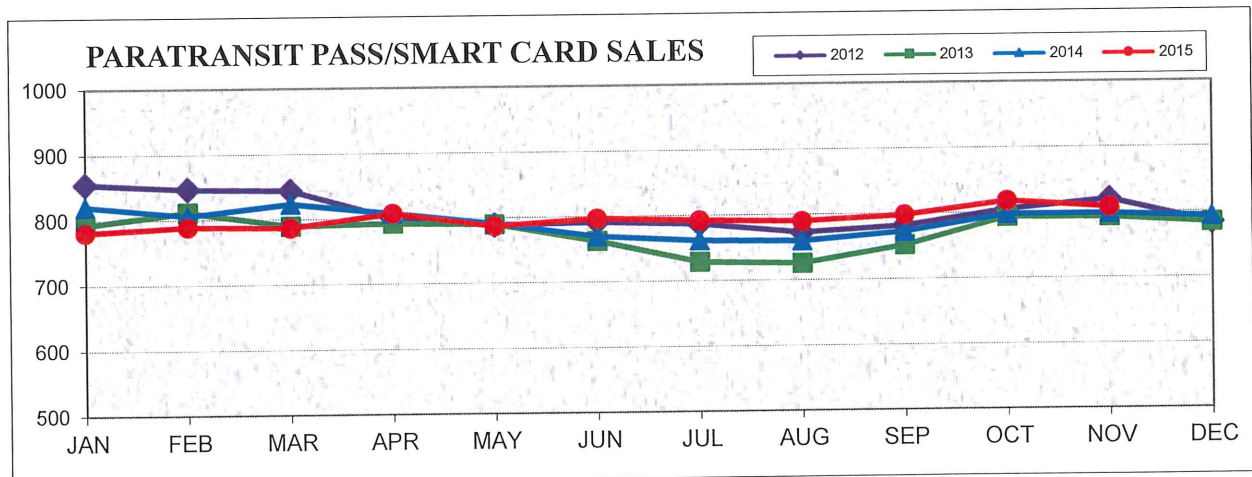
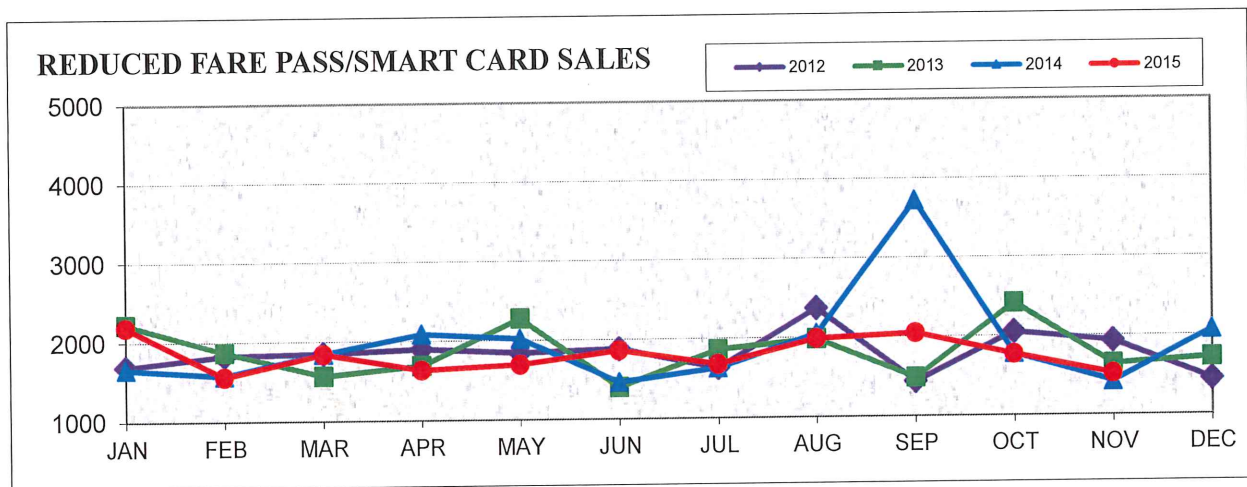
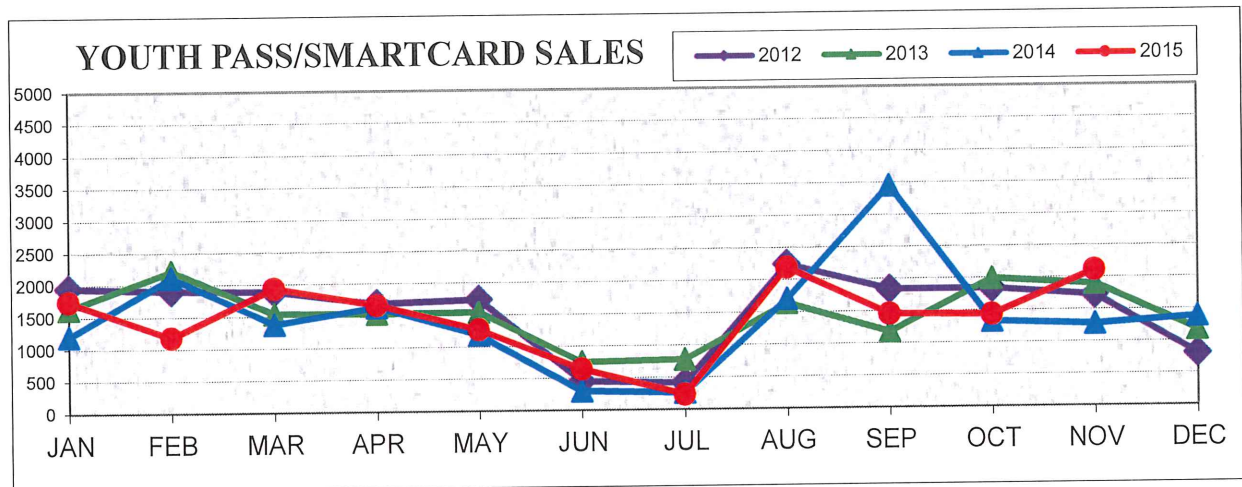
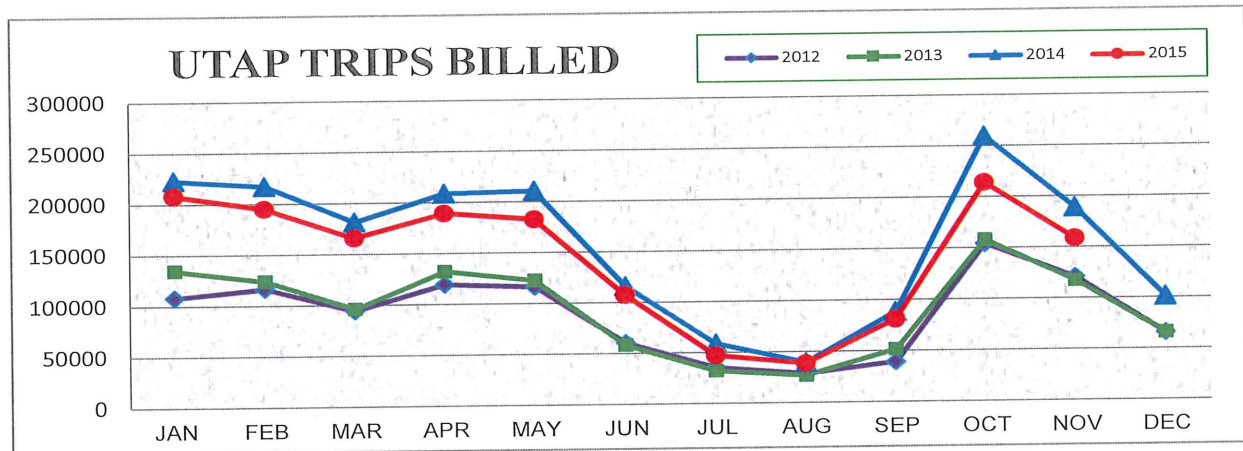
RIDERSHIP



PASS SALES



PASS SALES



SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8C : DECEMBER 2015 OPERATING INDICATORS

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Steve Blaska, Director of Operations
Karl Otterstrom, Director of Planning

SUMMARY: December 2015 had the same number of weekdays as December 2014.

FIXED ROUTE

Average weekday ridership decreased 6.3% (33,127 vs. 35,364 in December 2014) and is down 4.7% (37,069 vs. 38,912) YTD. Total ridership decreased 5.6% (833,695 vs. 883,418 in December 2014) and is down 4.5% (10,915,736 vs. 11,324,434) YTD. The ridership goal for 2015 is 0.5% growth.

- Adult ridership decreased 6.0% (507,738 vs. 539,983 in December 2014) and is down 5.6% (6,755,415 vs. 7,158,972) YTD.
- Youth ridership decreased 10.7% (50,518 vs. 56,560 in December 2014), and is down 1.9% (666,248 vs. 678,971) YTD.
- Reduced Fare/Para ridership decreased 2.0% (117,855 vs. 120,313 in December 2014), and is up 2.0% (1,479,294 vs. 1,449,704) YTD.
- UTAP program ridership decreased 22.0% (79,189 vs. 101,551 in December 2014) and is down 11.9% (1,669,342 vs. 1,894,410) YTD.
 - CCS Pass program ridership decreased 34.1% (24,139 vs. 36,622 in December 2014), and is down 11.0% (703,037 vs. 790,298) YTD.
 - Eagle Pass ridership decreased 18.5% (43,290 vs. 53,103 in December 2014), and is down 14.5% (819,492 vs. 958,110) YTD.
 - GU Bulldogs Pass ridership totaled 4,559 riders for December and 14,969 YTD.

PARATRANSIT

Monthly ridership decreased 3.9% (36,661 vs. 38,166 in December 2014) and is down 2.3% YTD (464,449 vs. 475,171 in 2014). The decrease in December's ridership may be partially attributable to the increased snowfall during the month. The decrease in the YTD numbers is partially attributable to the combined effect of the Mobility Training program and the ability of some customers to use the fixed route system for some trips. The 2015 ridership goal is to maintain 2014 ridership.

VANPOOL

Vanpool customer trips were down by 13.2%, (17,181 vs 19,799 in December 2014) and down 10.0% (219,578 vs. 246,331 YTD.) The decline in ridership year over year is attributed to fewer riders taking fewer active trips. The 2015 ridership goal is a 7% increase over 2014; however, now our objective for 2015 is to stabilize ridership and return to year end 2014 ridership of 240,194 by the end of 2015.

CUSTOMER SERVICE

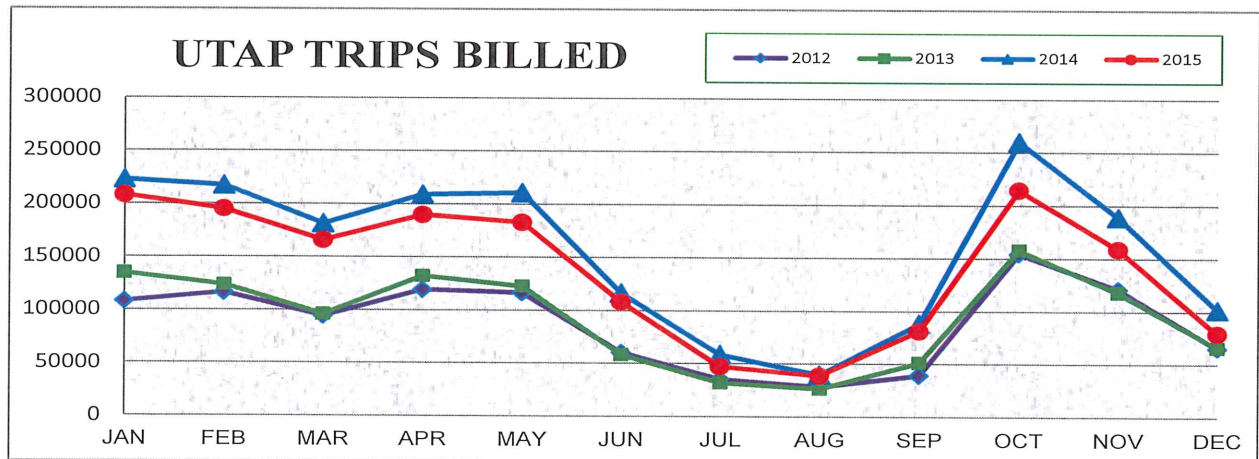
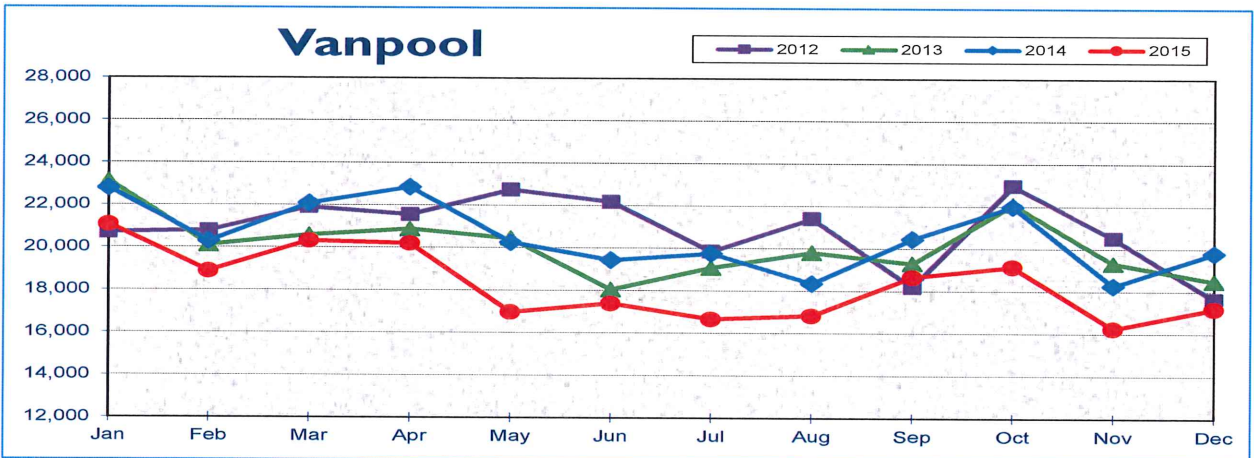
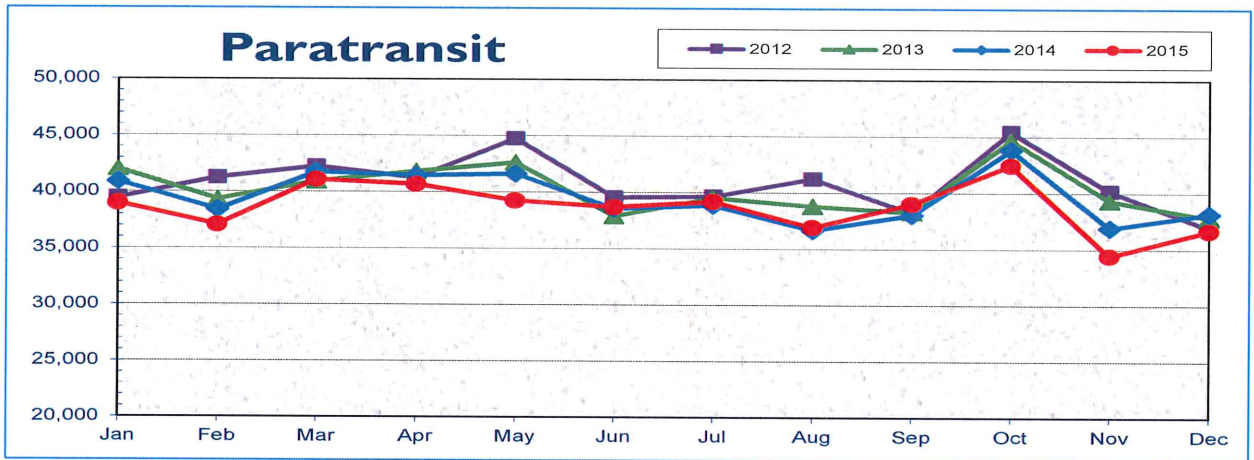
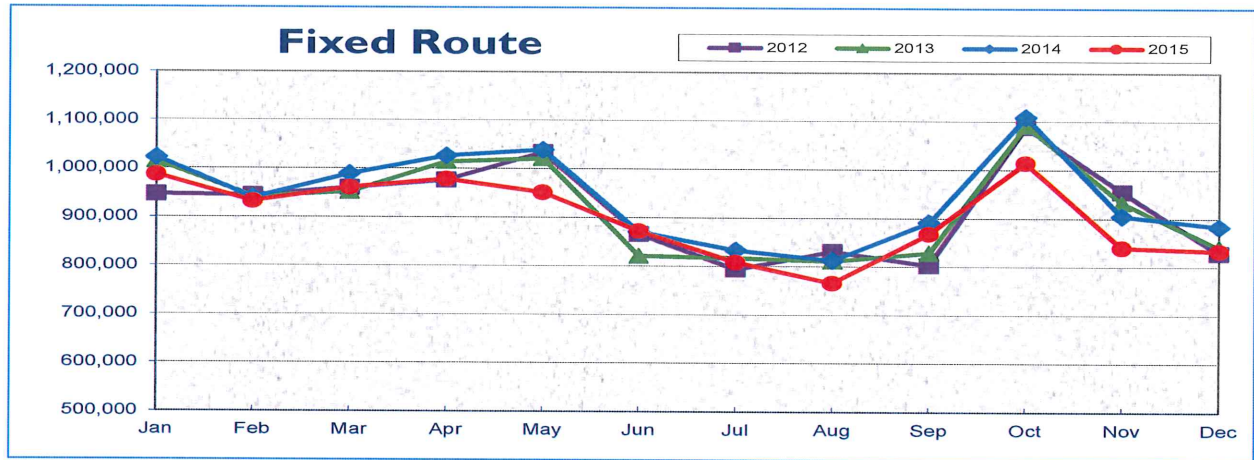
Monthly pass sales information will be available after year end financials are completed.

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____ Chief Executive Officer _____ Legal Counsel _____

UTAP TRIPS BILLED



SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8D : FOURTH QUARTER 2015 SAFETY AND LOSS SUMMARY REPORT

REFERRAL COMMITTEE: Operations and Customer Service

SUBMITTED BY: Steve Doolittle, Director of Human Resources
Mike Toole, Manager of Safety & Security

VEHICLE ACCIDENTS

Fixed Route: There were eleven (11) preventable accidents in the fourth quarter, resulting in a rate of 0.06 per 10,000 miles. This rate is under our standard of 0.08 per 10,000 miles. Severity on the 11 preventable collisions shows one Category 3; one Category 2; six Category 1 collisions; and three Category 0. Eight operators struck fixed/stationary objects, one failed to yield at an intersection striking another vehicle, one rear-ended another vehicle, and one passenger was transported to receive medical treatment due to a sudden stop by the operator.

Paratransit: There were four (4) preventable accidents reported this quarter. The resulting preventable accident rate of 0.08 is under our standard of 0.09 per 10,000 miles. Severity on the 4 preventable collisions shows three Category 1 and one Category 0. Two operators struck stationary objects while backing, one struck a vehicle gate, and one struck a fixed object during a pull-in stop.

EMPLOYEE INJURIES

Forty six (46) injury events were reported during the fourth quarter. Nineteen (19) injuries involved medical treatment and, of those, thirteen (13) involved time loss from work. The total number of worker's compensation claims filed year to date is 73, two more than the total claims filed by the end of the fourth quarter in 2014 (71). Employee lost work days YTD are higher (2,669 vs 2,336) at fourth quarter end. The majority of accidents this quarter are slip/trip/fall injuries and injuries involving the pushing/pulling of objects or materials.

OTHER KEY EVENTS

- On-board vehicle camera system operations:
 - 386 video requests processed in the following categories: vehicle accidents, passenger injuries, customer complaints, and public records requests; up from the 315 processed for the same period in 2014.
- Security filed 544 incident reports this quarter resulting in 101 arrests and 181 exclusions compared to 358 reports in the same quarter of 2014 with 47 arrests and 169 exclusions.
- STA's On-Board Security Patrol completed 36 patrols on 42 different fixed routes. The total on-board time was approximately 39 hours.
- Two new security officers were hired and started work on 10/19: Travis Rosengrant and Jeremy Green.
- Agreed in principle to participate in a 2017 Oregon University driver health study; study will monitor a group of driver's sleep, shift work, and health habits for a 3-year period. Purpose is to slow weight gain, enhance job performance, and promote safety.
- Real-time building camera system monitoring began at the Valley Transfer Center due to fiber installation.
- Emergency relocation "Go Bags" distributed to Paratransit Reservationists & Dispatch employees and Customer Service Representatives.
- Cliff Schlienger, Security Coordinator, is on an extended absence. Ann Frunk has been named as interim Coordinator.

RECOMMENDATION TO BOARD: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____ Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING & EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8E : **FOURTH QUARTER 2015 SERVICE PLANNING INPUT REPORT**

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Karl Otterstrom, Director of Planning
Matt Kenney, Transit Planner III

SUMMARY:

The Planning Department documents comments received from external sources in order to follow up with each customer and document feedback for emerging opportunities for future service changes. These comments are obtained from a variety of sources since customer engagement cannot be a one-size-fits-all approach. Planning Department staff obtain feedback from customers at public meetings, through Customer Service, phone calls, letters, emails, voice messages, emails from STA Questions (STA website), and feedback from Coach Operators and Supervisors. Planning staff may also receive inquiry requests from STA Board Members. STA's Planning staff respond to every comment received when valid contact information is provided. Comments are also discussed at the Service Improvement Committee meetings.

The purpose of this summary is to inform the Performance Monitoring & External Relations Committee of the customer feedback received by the Planning Department in the 4th Quarter of 2015. It should be noted that this feedback summary applies only to Planning Department related activities which include, but are not limited to, planning bus service and/or feedback related to specific bus stops.

A total of 33 comments were received by the Planning Department in the 4th Quarter of 2015. Of the 33 comments, 14 were related to requests for new service, 7 were related to existing service, 10 were related to bus stops, and 2 comments were not related to bus stops or new service. This "other" category could be requests for new park and rides or general planning related requests for data from other jurisdictions, businesses, or the general public. The comments are summarized below. It is also noted if any comments were listed in the STA Moving Forward plan.

NEW SERVICE COMMENTS

2 comments requesting new service to the CHAS Clinic in Spokane Valley east of Sullivan Rd on Indiana Ave. Included in STA Moving Forward Plan but unfunded at this time.

2 comments requesting new service to the Beau Rivage/Riverwalk Apartment complexes (Upriver Dr east of Havana St north to Frederick Ave). *Not included in STA Moving Forward Plan due to difficulties in serving this area. Current bus service travels as far as Myrtle St and Frederick Ave forcing passengers to walk in an area notorious for incomplete sidewalks.*

4 comments requesting later service past 11 pm and/or 24 hour service in order to make connections to Greyhound/Amtrak and to provide more options for people who work late hour/early morning shifts. One comment elaborated further to request express service past midnight from the Liberty Lake, 5-Mile, Valley Transit Center, and South Hill Park & Rides. Service past 11 pm was included in STA Moving Forward Plan but unfunded at this time; however, 24 hr service was not due to the high costs with little ridership return on investment in a city this size.

1 comment requesting service to Coeur D'Alene. Included in STA Moving Forward Plan but unfunded at this time.

1 comment requesting more mid-day service to Mirabeau Park & Ride on Route 174 due to large gaps in service. Included in STA Moving Forward Plan but unfunded at this time.

1 comment requesting express return service to Hastings Park & Ride on Route 66 from the Eastern Washington University. *Not included in STA Moving Forward Plan due to Routes 25 and 124 already providing return service. This request would also increase peak vehicle requirements because students wanting to travel downtown would avoid these buses.*

1 comment requesting service to Chase Middle School which is about 1.5 miles east of Ferris High School on 37th Ave on the South Hill. *Not included in STA Moving Forward because it is extremely out of direction from existing routes. It is also difficult to turn a bus around in this area. It would also expand the Paratransit boundary.*

NEW SERVICE COMMENTS

1 comment requesting service to the Hangman Valley/Latah area. *Not included in STA Moving Forward because of the difficulties in serving this area due missing sidewalks, disconnected roadways, and buses having to cross two directions of Hwy 195 with other vehicles traveling in excess of 55 mph. STA served this area before and the route had very low ridership.*

1 comment requesting service to the Veterans Resource Center in the Mirabeau Pkwy and Pines Rd area south of Trent Ave in Spokane Valley. *Not explicitly included in STA Moving Forward but may be considered as part of service restructures that could occur concurrent with service improvements as part of STA Moving Forward.*

EXISTING SERVICE COMMENTS

2 comments related to not having enough time to transfer between routes at SCC (Route 32 to Route 29) and the existing transfer bus stop environment at Trent Ave and Dale Rd(Route 32 to Route 94). *STA is currently working with WSDOT in order to provide an alternative connection point or improve the existing connection point through sidewalk improvements and/or stop relocations thereby making the transfer environment safer for passengers.*

1 comment from someone wanting all Plaza bus routes to arrive downtown early enough to transfer to Route 174 at 5:20 am. *This would be a cost increase and comment was noted.*

1 comment to move the Route 28 end of line from the Whitworth shelter to North Waikiki Rd. *The end of line on Route 28 is a known issue due to limited access to a restroom for coach operators and will be addressed in 2017.*

1 comment on catching the bus at Campbell St and Prentis St on Route 62 in Medical Lake.

1 comment from someone wanting STA to provide 60 ft buses on Route 25 on weekdays due to overcrowding. *STA has a limited number of articulated coaches and they are mostly used on Route 66 on weekdays. STA Moving Forward included additional articulated coaches and a reconfiguration of the Plaza loading zones to accommodate additional capacity on the route.*

1 comment regarding the proposed May 2016 Route 29 revision in the U District that eliminates service on Riverpoint Blvd due to loss of service to the Health Science Building. *All routes serving the U District are proposed to follow the same path thereby simplifying service and providing more buses to catch. The proposed bus stops will be a short walk to the Health Science Building. This is a minor change still under consideration.*

BUS STOP COMMENTS

8 comments related to bus stop locations. This includes requests from business owners to relocate stops and/or eliminate stops due to issues that are perceived to be caused by bus riders such as litter and vandalism. It also includes issues with safety such as requesting a crosswalk at an existing bus stop in Spokane Valley which is outside of STA's authority.

1 comment stating that they did not like the color of the existing bus stops.

1 comment requesting new stops on an existing route.

OTHER COMMENTS

1 comment requesting the SEPA checklist for a project in the Indian Trail area and ridership data on Route 23.

1 comment suggesting we build a park & ride at Joe Albi stadium for 7-Mile and 9-Mile residents. *Not included in STA Moving Forward. Spokane Transit has an optional lease with the Spokane Parks Board for a bus layover and park and ride on the site.*

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

**SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING**

February 3, 2016

AGENDA ITEM 8F : COMMUNITY OUTREACH AND INVOLVEMENT

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Beth Bousley, Director of Communications and Customer Service

SUMMARY: This document provides regular updates on all 2016 Communications Objectives to support STA Priorities.

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY

Date: February 3, 2016

SUBJECT: 2016 Communications Update

Beginning in Q4 or 2015, we began working toward the following communications objectives to support STA's priorities, with the ultimate goals of increasing ridership and improving community perception:

STA Priority	Communication Objective
Ensure Safety	▪ Enhance user education and information services
Earn and Retain the Community's Trust	▪ Enhance brand and identity ▪ Communicate/engage key audiences ▪ Improve/control STA image ▪ Improve online access to information
Provide Outstanding Customer Service	▪ Improve customer experience
Enable Organizational Development	▪ Improve internal communications
Exemplify Financial Stewardship	▪ Communicate financial performance metrics to demonstrate transparency and accountability

Here are highlights of the work accomplished to achieve these objectives:

STA PRIORITY: EARN AND RETAIN THE COMMUNITY'S TRUST

1. Communication Objective: Improve internal communications

Strategy: Create weekly newsletter for STA Board of Directors

Progress:

- Conducted CEO & transit communication best practice research
- Designated a standardized templates
- Ongoing weekly distribution of "From the Driver's Seat" to STA Board of Directors (18 distributed to date)

2. Communications Objective: Communicate/Engage key audiences

Strategy: Encourage participation in existing UTAP programs through targeted promotions

Progress:

- **Gonzaga**
 - Implemented Interim advertising and events to boost ridership for brand new UTAP program
 - Conducted informal student research
 - Developed marketing plan and creative strategy
 - Worked with GU's Sustainability Department and incorporate student input into final plan and creative
 - Worked with GU's Marketing Department to gain input on branding
 - Approval just received from GU to move forward with promotions, which will begin in February.
 - Ridership to date: 15,000 (UTAP program begin in September 2015)
- **EWU, SCC, SFCC, WSU Spokane**
 - Research conducted or in progress
 - Marketing plans being developed and present to student leadership
 - Implemented interim events to boost ridership, including social media, microsite
 - Marketing plans to begin within the next month

UTAP Creative Examples:



3. Communications Objective: Communicate/Engage key audiences

Strategy: Increase participation in Employer Sponsored Bus Pass Program (ESBP)

Progress:

- Best practice review of how other like-sized agencies are promoting their programs
- Interviews with transit marketing representatives have been conducted
- Existing ESBP customers have been surveyed
- A short term plan for increased outreach to current customers will launch this spring.
- An updated marketing plan is being developed based on the research data

4. Communication Objective: Communicate/Engage key audiences

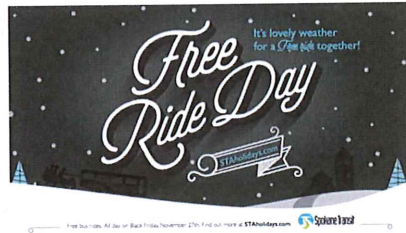
Strategy: Promote Free Fare Day on Black Friday and the benefits of using STA throughout the holiday season

- Primarily targeted women, 25-54 in the Spokane area
- Strategies included community relations/partner outreach, social media, earned media, traditional advertising (radio, print, bus), collateral marketing, microsite/online digital strategy

Results:

- Total publicity value of earned media coverage: \$33,676.45
- Total news stories: 20
- Unique internet impressions: 2,388,283
- Broadcast audience (source: Nielsen): 150,256

- Site performance: 2,102 visitors
- Social performance
 - New Facebook page likes: 863
 - Total people engaged: 5,486
 - Total reach: 336,144 (37,104 organic)
 - Total impressions: 415,586 (86,956 organic)

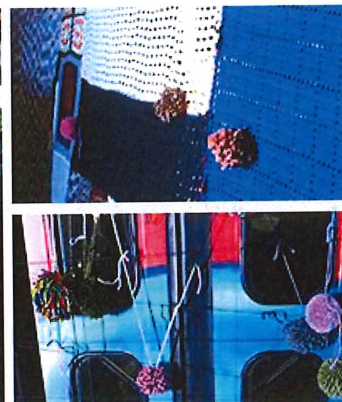


5. Communication Objective: Engage key audiences

Strategy: Partner with local artists to create memorable First Night by sweatering a bus

Results:

- Local knitters coordinated a nationwide effort to collect knit and crocheted pieces used to "sweater" a 30' bus. Onboard the bus, volunteers handed out hundreds of donated knit/crocheted scarves and hats to visitors, many of whom expressed appreciation for STA's efforts to "keep Spokane warm". The yarn pieces covering the bus will be made into blankets and given to the homeless.
- The First Night event received substantial media attention and was videotaped for future communication needs



6. Communication Objective: Communicate/Engage key audiences

Strategy: Grow enrollment in STA's Vanpool Program through awareness, support, lead generation, and ultimately ridership

Progress:

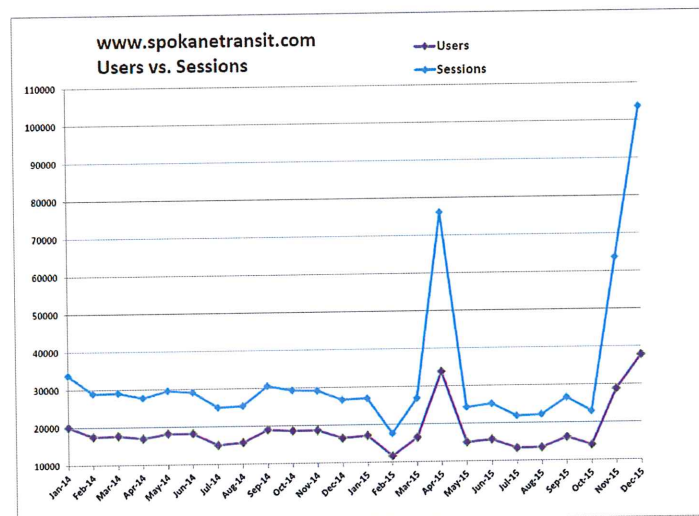
- Launched digital strategy in January, targeting the following channels with vanpool:
 - Search (Google and Bing)
 - Site visitors (retargeting)
 - Social (People having the conversation)
- Leveraged a 4-split creative test to reach the broadest audience and learn what motivates our audience to choose vanpool and driver interested parties to a strong point of conversion:
 - I need a ride
 - I need a winter commuting solution
 - I want to save money on my commute
 - I want to commute smarter
- Results:
 - One week into the campaign, 82,128 impressions, resulting in 381 visitors and 12 leads.

7. Communication Objective: Improve online access to information

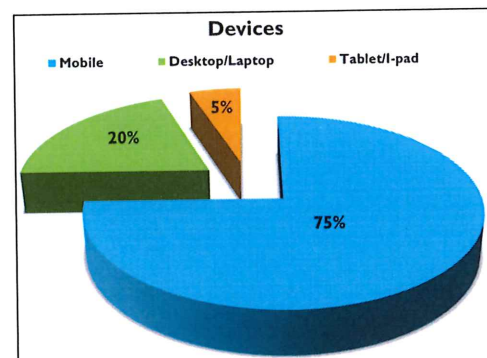
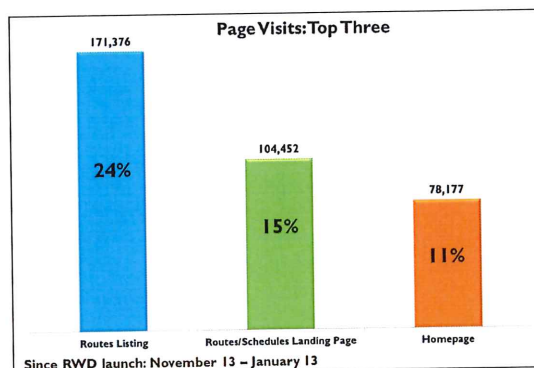
Strategy: Facilitate and enhance access to online information and payment mechanisms

Progress:

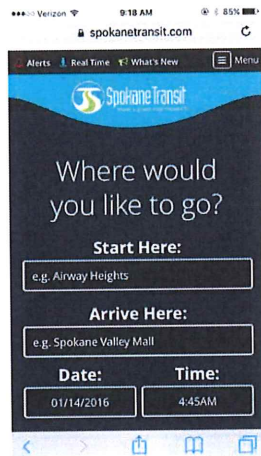
- Launched new website based on responsive web design, which provides a better user experience, consistent content display for all platforms, and more consistent metrics. The graph below shows the increase in traffic at the end of 2015, and January showed another increase, with about 40,000 unique visitors to the site.



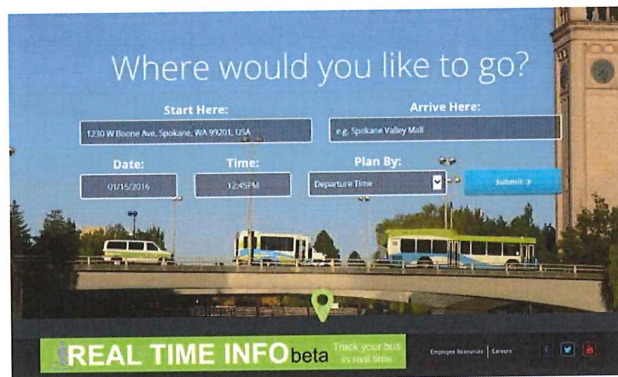
- 75% of website access is from mobile devices; 40% of visits are to routes or schedules.



- Online payment methods have resulted in \$500,000 online payments:
 - Vanpool Payment Center: \$266,149.58 from 518 vanpoolers
 - Spokanetransit.com Online Store: \$235,592 from 314 customers
- Building real-time customer information, providing a positive soft launch of Trapeze INFO products, and creating a platform for future success
 - Promoting on website, digital monitors and information signage at the Plaza, social media
 - Conducting usability testing to ensure optimal user experience



Mobile Page



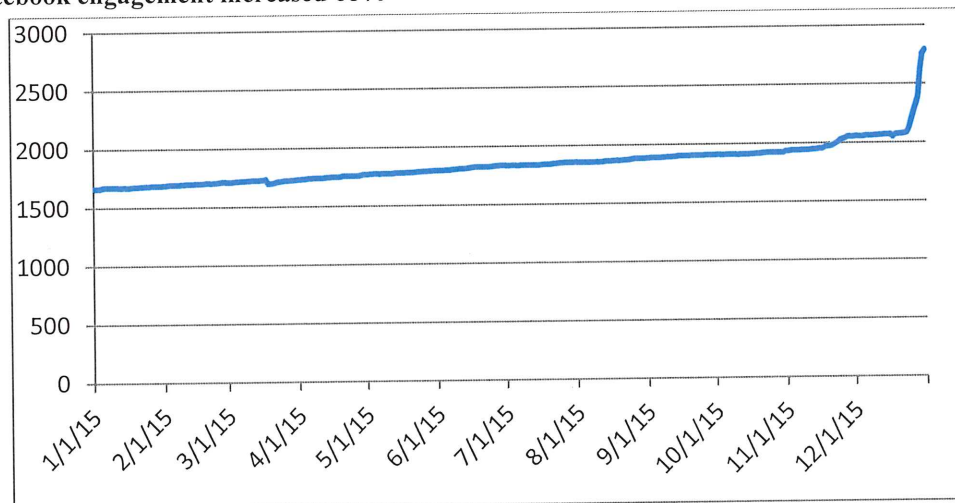
Promotional banner on website

8. Communication Objective: Improve online access to information

Strategy: Leverage social media to gather feedback, reach new audiences, promote closer relationships with customers

Progress:

Facebook engagement increased 68%



- Facebook engagement increased 68%, ending the year with 2,795 likes
 - Comparison: City of Spokane: 4,708 likes, Community Transit: 2,955 likes, Pierce Transit: 2,804 likes, CTRAN: 1,104 likes
- Increased reach through consistent engagement, successful video strategy, STA's first fully integrated advertising campaign (I am driven)

STA PRIORITIES: ENSURE SAFETY, EARN AND RETAIN THE COMMUNITY'S TRUST

Strategy: Launch courtesy campaign to reinforce rules of conduct

Progress:

- Partnered with EWU Visual Graphic Design to create a courtesy campaign to strengthen relationships with EWU as well as downtown partners, and reinforce good behavior on the bus and at the plaza.
- Featured in monthly ads in Kid's newspaper since September
- Launched in January with advertising on buses, banners at the Plaza
- Invited to present at APTA Marcom Workshop in February
- Asked to provide letter of commendation for EWU associate professor

Next steps:

- Developing a media strategy to maximize appropriate usage of this campaign and its messages



SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 8G : 2016 CITIZEN ADVISORY COMMITTEE MEETING CALENDAR

REFERRAL COMMITTEE: N/A

SUBMITTED BY: Beth Bousley, Director of Communications and Customer Service

SUMMARY: Shown below is a schedule of 2016 Citizen Advisory Committee (CAC) meeting dates.

2016 CAC MEETING SCHEDULE

(Third Wednesday) 5:30pm
January 13
February 10
March 9
April 13
May 11
June 8
July 13
No August meeting
September 14
October 12
November 9
December 14

Meetings will be held on the second Wednesday of the month at the Spokane Transit Boardroom, 1229 West Boone Avenue, at 5:00 p.m. Please note that there are no exceptions from Wednesday meeting dates during 2016.

RECOMMENDATION TO COMMITTEE: Information only.

FINAL REVIEW FOR BOARD BY:

Division Head _____

Chief Executive Officer _____

Legal Counsel _____

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 9: MARCH 2016 DRAFT COMMITTEE PACKET AGENDA REVIEW

REFERRAL COMMITTEE: N/A

SUBMITTED BY: STA Staff

SUMMARY: At this time, members of the Performance Monitoring and External Relations Committee will have an opportunity to review and discuss the items proposed to be included on the agenda for the March 2, 2016, meeting.

DRAFT AGENDA

Estimated meeting time: 90 minutes

1. Call to Order and Roll Call
2. Public Expressions
3. Committee Chair Report *(5 minutes)*
4. Committee Action *(10 minutes)*
 - A. Approval of Minutes of the February 3, 2016, Committee meeting – *Corrections/Approval*
 - B. Approval of Release of an Invitation for Bids for the Jefferson Park & Ride Lot *(Otterstrom)*
 - C. Acceptance of Boone Tenant Improvements Contract & Approval to Pay Retainage *(Otterstrom)*
5. **Committee Action** *(10 minutes)*
 - A. Board Consent Agenda
 1. Award of Contract for Plaza Upgrades *(Otterstrom)*
 2. Award of Contract for the Purchase of Eight (8) Fixed Route Coaches *(Blaska)*
 - B. Board Discussion Agenda
(No items being presented this month.)
6. **Reports to Committee** *(45 minutes)*
 - A. Fixed Route System Ridership Analysis – 2015 Year End Summary *(Otterstrom)*
 - B. West Plains Transit Center – Update *(Otterstrom)*
 - C. Year End 2015 Unaudited Financial Report *(Warren)*
 - D. Year End 2015 Performance Measures *(Blaska)*
 - E. 2015 Communications Recap and 2016 Communications Plan *(Bousley)*
7. CEO Report *(10 minutes)*
8. Committee Information – *no discussion/staff available for questions*
 - A. January 2016 Financial Results Summary *(Warren)*
 - B. February 2016 Sales Tax Revenue Information *(Warren)*
 - C. 2015 State Audit *(Warren)*
 - D. Year End 2015 Safety & Loss Summary *(Doolittle/Toole)*
 - E. January 2016 Operating Indicators *(Blaska)*
 - F. Community Outreach and Involvement *(Bousley)*
9. March 2, 2016, Committee Packet Agenda Review
10. New Business *(5 minutes)*
11. Committee Members' Expressions *(5 minutes)*
12. Adjourn

Next Committee Meeting: April 5, 2016, 1:30 p.m.

(STA Southside Conference Room, 1230 West Boone Avenue, Spokane, Washington)

SPOKANE TRANSIT AUTHORITY
PERFORMANCE MONITORING AND EXTERNAL RELATIONS COMMITTEE MEETING

February 3, 2016

AGENDA ITEM 11 : COMMITTEE MEMBERS' EXPRESSIONS

REFERRAL COMMITTEE: N/A

SUBMITTED BY: N/A

At this time, members of the Performance Monitoring and External Relations Committee will have an opportunity to express comments or opinions.

RECOMMENDATION TO COMMITTEE: N/A

FINAL REVIEW FOR BOARD BY:

Division Head _____ Chief Executive Officer _____ Legal Counsel _____