

STAFF REPORT

SUBJECT: Consolidated Transportation Services Agency (CTSA)

RECOMMENDED ACTION:

- 1) Designate San Joaquin Regional Transit District as the CTSA
- 2) Allocate \$552,774 from the Fiscal Year 2018-19 Local Transportation Fund for the CTSA

SUMMARY:

CTSAs were created under a California state law approved in 1979, when the state legislature passed Assembly Bill 120 named Social Services Transportation Improvement Act. The purpose of the state law was to improve the quality of transportation services to low mobility groups while achieving cost savings and more efficient use of vehicles and funding resources. Designation of CTSAs were seen as a flexible mechanism to deal with the problem of inefficient or duplicative transportation services.

The San Joaquin Regional Transit District (RTD), in conjunction with other transit operators in San Joaquin County, has proposed to form a **Consolidated Transportation Services Agency (CTSA)**. The proposal would designate RTD as the CTSA to administer countywide services such as Americans with Disabilities Act (ADA) Assessment, Volunteer Incentive Programs, and Mobility-On-Demand, with an effort to seek efficiency in service delivery. These activities would be funded by a 2% “off the top” from the Local Transportation Fund (LTF). The Transportation Development Act allows CTSA’s to claim up to five percent.

While the result is that all LTF transit and streets and roads claimants will receive less funding, the expectation is that a CTSA will result in greater efficiencies. There is no opt-out option for claimants. RTD and other transit operators have expressed the desire to start the CTSA in **Fiscal Year 2018-19 with an initial request of 2% of the LTF apportionment which calculates to \$552,774**. This would require amending the adopted LTF apportionment that the Board approved in February 2018.

During the Regional Transit Systems Plan update, the SJCOG Board expressed an interest in transit providers working on more coordination and consolidation to improve efficiencies. The CTSA activities outlined in this staff report are an initial step in doing that.

SJCOG, as the Regional Transportation Planning Agency (RTPA) for San Joaquin County, is responsible for designating the CTSA.

RECOMMENDATION:

- 1) Designate San Joaquin Regional Transit District as the CTSA.
- 2) Allocate 2% (\$552,774) from the Fiscal Year 2018-19 Local Transportation Fund for operation of the CTSA.

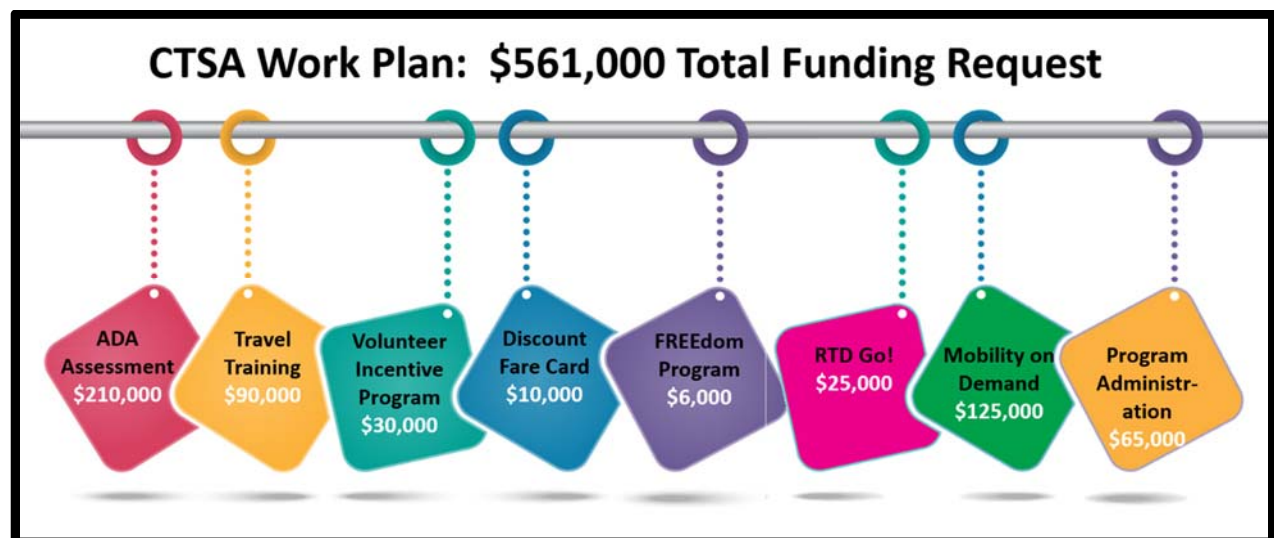
FISCAL IMPACT:

Allocation of 2% (\$552,774) of the Fiscal Year 2018-19 Local Transportation Fund for operation of the CTSA would result in lower LTF distributions for transit and streets and roads claimants.

DISCUSSION:

CTSA Work Plan

RTD and its transit partners (Cities of Lodi, Manteca, Escalon, and Tracy) have developed a menu of services. The CTSA Work Plan includes seven programs plus administration with a total estimated annual cost of \$561,000. The programs and costs are outlined in below, and described in greater detail in **Attachment A**.

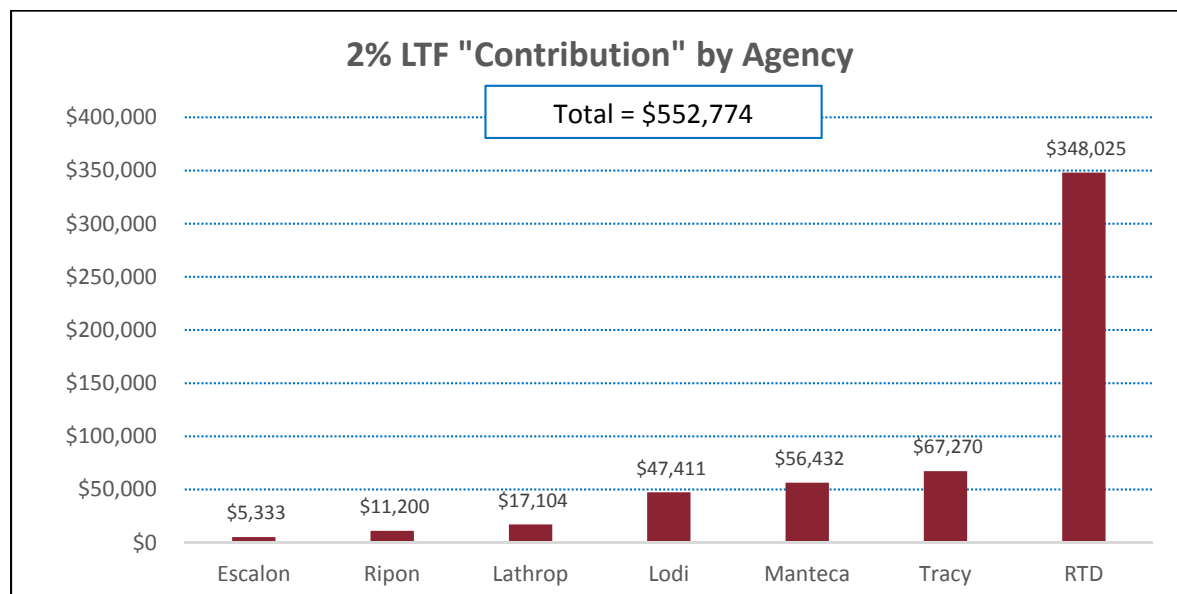


CTSA Funding

Under TDA, there are two potential sources of funding for CTSA activities. One is Local Transportation Funds which is allowed up to 5 percent under the law and the other is the State Transit Assistance Fund (which does not have a statutory percentage limitation).

RTD and the transit agency staff from the cities of Lodi, Manteca, Tracy and Escalon have proposed an initial startup cost of 2% from LTF. **It is important to emphasize that CTSA costs are not a jurisdiction-by-jurisdiction allocation, but rather, an “off the top” calculation.**

However, RTD anticipated the question regarding “what would it mean” in terms of reduced funding to each agency’s LTF. For illustrative purposes only, the total proposed funding amounts impacted by each LTF recipient for FY18-19 is shown below:

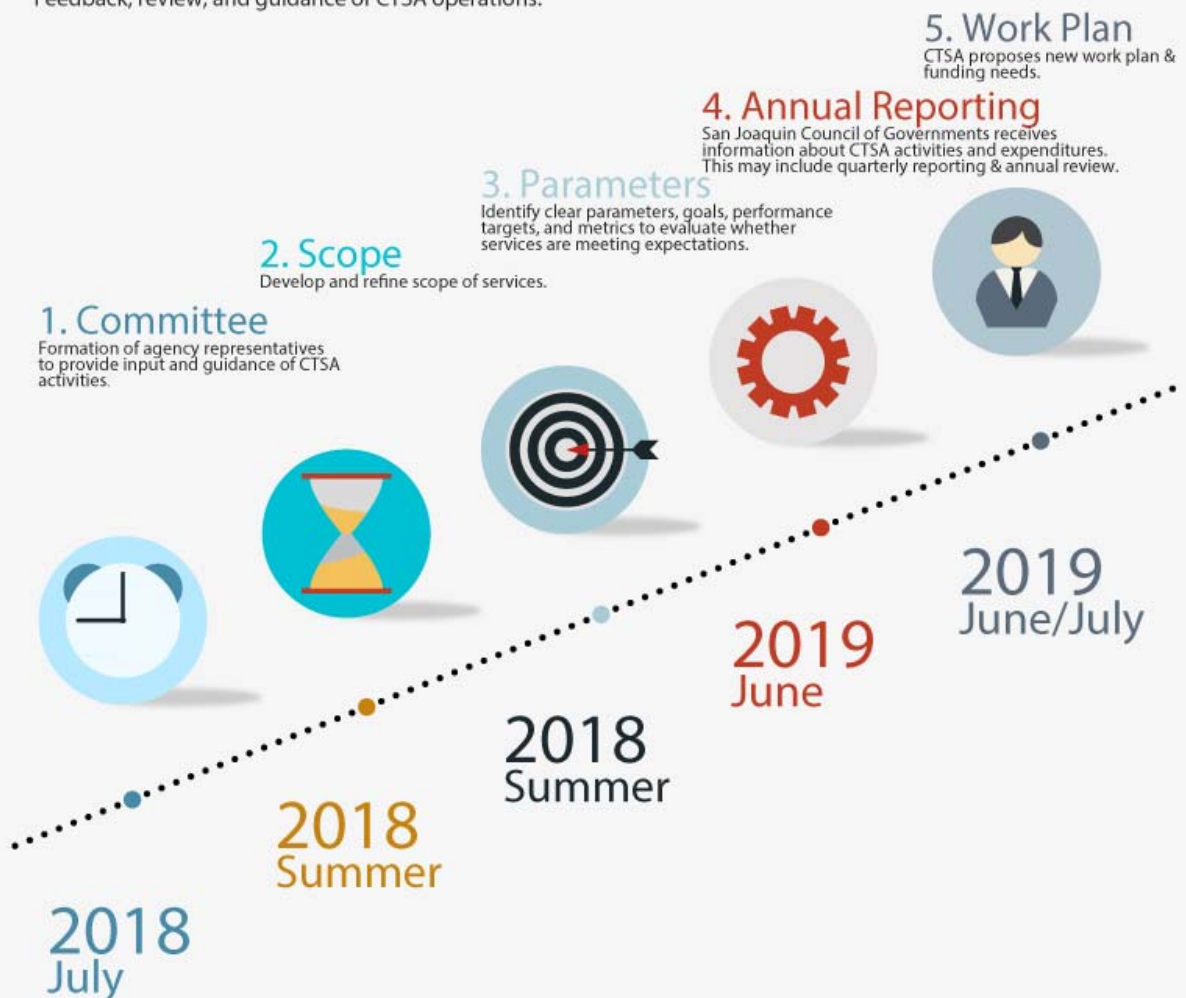


Review Process

Once the CTSA is formed, it is proposed that a technical advisory committee consisting of all the transit managers and city representatives will be established to provide input and guidance. This includes providing direction for the development of scopes of work for new services and setting parameters for existing programs. The program will come back to the SJCOG Board at the end of the fiscal year for annual review.

CTSA Development & Review

Feedback, review, and guidance of CTSA operations.



COMMITTEE ACTIONS:

This item was approved unanimously at the Social Service Transportation Advisory Committee, Technical Advisory Committee, Management & Finance Committee, and Citizens Advisory Committee. Staff will verbally report on the Executive Committee action if requested by the Board.

NEXT STEPS:

If approved, RTD will form the CTSA and begin operation on July 1, 2018.

ATTACHMENTS:

- A) CTSA Workplan (Provided by RTD)
- B) CTSA Presentation (Provided by RTD)

Report prepared by Rob Cunningham, Senior Regional Planner

San Joaquin Consolidated Transportation Services Agency (CTSA) Work Plan

The following work plan was developed collaboratively by the transit managers from Tracy, Manteca, Lodi, Escalon, and the San Joaquin Regional Transit District (RTD). Once a CTSA is formed, it is proposed that a Technical Advisory Committee (TAC) consisting of all the transit managers and city representatives will be established to provide input and guidance. This includes providing direction for the development of scopes of work for new services and setting parameters for existing programs. Please note, many of the proposed services are fairly new, so as a result, developing an accurate demand and cost forecast is challenging. The costs outlined below are estimated costs and will be reconciled at the end of the year.

Americans with Disabilities Act (ADA) Assessment

In 1990, the Americans with Disabilities Act (ADA) declared that access to mass transit is a civil right and mandated transit companies provide complementary paratransit service along with regular fixed-route service. To qualify for ADA paratransit services, individuals typically go through an eligibility process.

The six transit agencies operating in San Joaquin County currently use an independent ADA paratransit eligibility processes, which means that ADA passengers traveling outside of their approved service area need to have their eligibility status forwarded to the appropriate agency. Those passengers are then only granted visitor status, which is valid for 21 days of service within a year.

Under the proposed CTSA, the eligibility process would be centralized and conducted in-person by professionally-trained mobility coordinators. This process offers a single point of contact for countywide residents, available five days a week with satellite offices throughout the county and requires only one certification in order to use all six transit agencies countywide. Not only does this process benefit passengers, but it will also reduce the staff time of city employees.

Based on one vendor's estimate, the projected annual cost to administer a regional ADA in-person assessment process is approximately \$210,000. This cost does not include transportation expenses associated with transporting the passenger to and from the assessment center. Each transit agency will be responsible for providing transportation for its residents.

Travel Training

Travel training would be offered to passengers interested in ADA services, whether they are deemed eligible or not, Travel Training would offer the additional support passengers may need to feel comfortable using public transit. Using public transit can be intimidating for some riders who are unfamiliar with the system, have special needs, or use mobility aids. Having an effective travel training program is essential to providing equitable access to public transit.

Travel training provides seniors and people with disabilities the skills required to travel safely on fixed-route public transportation. The methods of travel instruction must reflect the individual's needs and travel trainers must have a thorough understanding of a person's specific ability to travel safely and independently. Under the CTSA, an expert trainer, knowledgeable about transit systems in San Joaquin, will provide comprehensive instruction on using local transportation options and help passengers travel independently, safely, and confidently.

In addition to improving the quality of life for passengers, travel training offers several operations and financial benefits to the transit systems. By encouraging the use of the most appropriate and cost-effective transit option to passengers, Travel Training will increase the use of public transit system and decrease the cost in providing paratransit service.

Based on estimates received from one vendor, the projected annual cost to administer a regional travel training program is approximately \$90,000.

Volunteer Incentive Program

The Volunteer Incentive Program (VIP) offers ADA-eligible passengers an additional mobility option. By allowing passengers to find their own volunteer drivers (e.g., family, friends or neighbors), VIP reimburses them for their mileage at the maximum Internal Revenue Service standard rate (which is currently 54.5 cents per mile). Most paratransit trips cost over \$35 per trip; a VIP trip would cost significantly less—projected to average approximately \$5 per trip.

Passengers have the luxury of recruiting their own properly licensed drivers and arranging transportation that fits their schedules. The only requirements are that all parties must submit liability waivers before they can participate in this program, and logs of the trips must be turned in the following month so that staff can audit and process the reimbursements. The transit system does not manage or have any relationship with the drivers since the reimbursements are paid to the passengers who are then required to pass on the full payment to their drivers.

The cost for VIP is purely dependent on the number of ADA-certified passengers in the county and the adoption rate of the program. Based on a conservative estimate, if five percent enroll in the VIP, the annual cost would be approximately \$30,000.

Discount Fare Card

The Federal Transportation Administration stipulates that grantees under Section 5307 “must allow the elderly, persons with disabilities, and Medicare cardholders to ride the fixed-route services for a fare that is not more than one-half the base fare charged other persons.”

With a CTSA, administrative efforts can be regionalized and streamlined in reviewing medical certifications and processing qualified persons based on age or medical criteria as agreed upon by the transit agencies. Passengers would be issued a single Discount Fare Card (DFC) that would be valid for any of the transit systems in the county.

The estimated cost to administer the DFC program is approximately \$10,000. The cost includes equipment, supplies, and staff time to process applications and print cards.

FREEdom Program

For passengers who are conditionally eligible for ADA services, the FREEdom Program encourages ADA passengers to ride fixed-route service instead of the paratransit service whenever possible by offering free fare for most local routes and one commuter BART route that travels to the Dublin/Pleasanton times each weekday. ADA passengers are automatically eligible for a FREEdom Pass as long as they apply after being ADA-certified. The cost per trip on fixed-route service is much lower than that of paratransit service. Analysis of RTD's one-year pilot for the FREEdom Program showed up to a 48% reduction in paratransit usage for passengers who received the pass.

The estimated cost to administer the FREEdom Program is approximately \$6,000. The cost includes equipment, supplies, and staff time to process applications and print passes.

RTD Go!

RTD Go! is an answer to the question of how to provide public transit connectivity to residents of rural areas of the county where traditional bus service is not practical. This program partners with a transportation network company, such as Uber, to provide on-demand transportation that is subsidized 50% up to \$5 per trip. Passengers receive more convenient transportation options that allow travel anywhere in the county outside of RTD's service area from 6 a.m. to 10 p.m., or for first/last mile connections to or from any of nine major transit centers throughout the county during the hours of 6 a.m. to 10 a.m. and 4 p.m. to 10 p.m.

This program extends service hours beyond those of the fixed-routes and offers more mobility options to the public. For passengers with physical disabilities or other limitations and to meet ADA and Title VI compliance, RTD Go! also partnered with an accessible service provider, Journey Via Gurney, to provide transportation at a \$10 flat fare per trip.

Based on the projected demand for the ongoing service and the patterns of use for trips to outlying cities, the anticipated annual contribution to the RTD Go! Program is approximately \$25,000.

Mobility on Demand

Similar to RTD GO! Mobility on Demand, RTD's own UBER-type service, an upcoming program using a specially procured fleet of ADA accessible vehicles to close the gaps in service coverage for the County's general population. Low-density suburban routes or routes serving outlying cities have seen relatively poor ridership due to long travel times. In addition, those transit stops also lack complementary multimodal options to help passengers complete the first and last few miles to and from destinations.

This program will offer a multimodal approach by integrating technology, ridesharing, and demand-responsive service outside the fixed-route service area, as well as first and last mile connections to help make public transit more efficient and accessible. Mobility on Demand will provide connections for residents in Thornton and Lockeford with Lodi, residents in Linden with Stockton, and residents in Mountain House with Tracy. The initial fleet will consist of eight vehicles strategically allocated throughout the county to provide the best coverage and meet the most demand. Given the exploratory nature of this project, there will be much room for flexibility and fine-tuning of the service parameters.

Based on the projected demand for the service and the patterns of use for trips to outlying cities of the RTD Go! Program, the anticipated annual contribution to RTD's Mobility on Demand is approximately \$125,000.

Program Administration

In an effort to provide adequate support for the CTSA, the program administration function is projected to cost approximately \$65,000 annually. This cost includes management and oversight of the CTSA as well as providing customer service, marketing, and outreach for all the

programs. The program manager will provide a monthly report summarizing the performance of each program to the CTSA TAC.

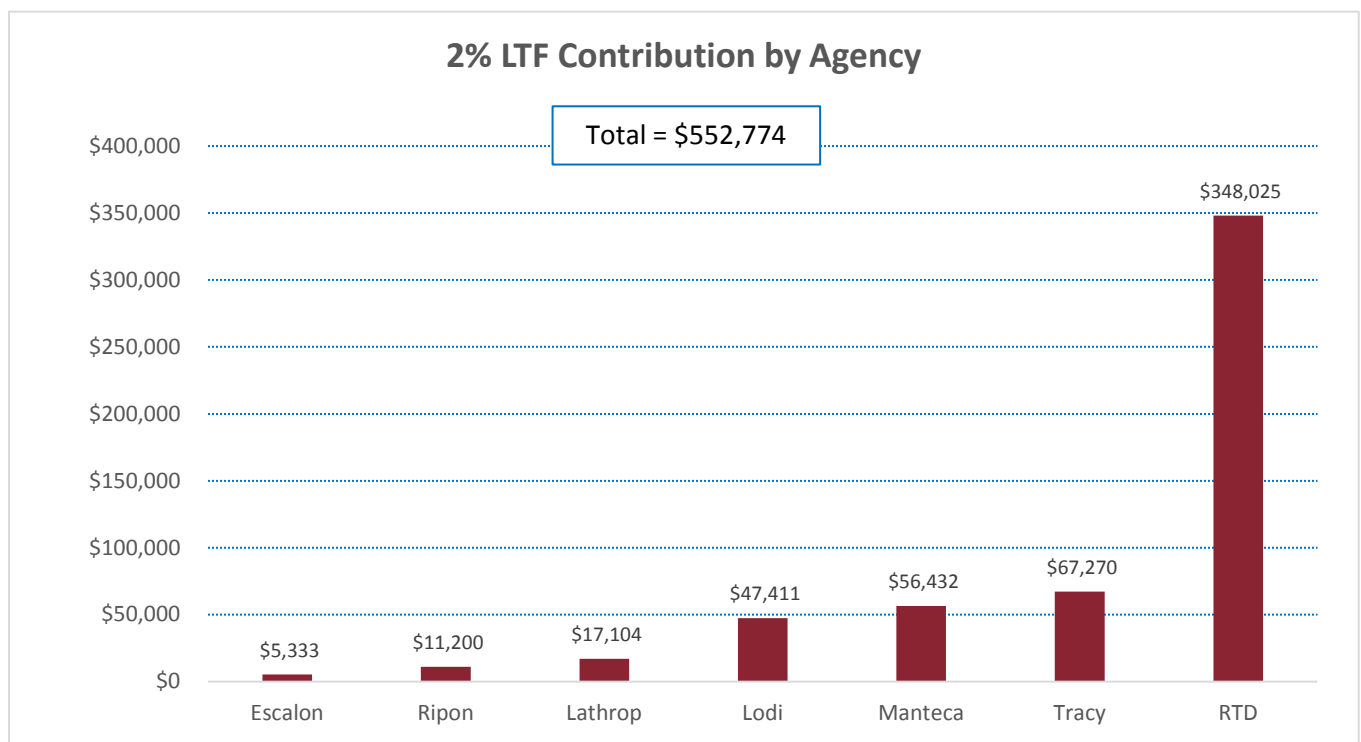
Summary

Below is a table summarizing the estimated annual costs for each of the programs and services. These are preliminary estimates and will be reconciled at the end of the year.

Program	Estimated Cost
ADA Assessment	\$210,000
Travel Training	\$90,000
Volunteer Incentive Program	\$30,000
Discount Fare Card	\$10,000
FREEdom Program	\$6,000
RTD Go!	\$25,000
Mobility on Demand	\$125,000
Program Administration	\$65,000
Total	\$561,000

It is important to note that despite the estimated total cost of \$561,000, the proposed Local Transportation Fund (LTF) contribution from each agency is two percent, which totals \$552,774. The agencies contributing LTF to the CTSA would be San Joaquin RTD, Tracy, Manteca, Lodi, Lathrop, Ripon, and Escalon. Please see projected contribution below.

With consideration for future potential service level increases, according to the statutes and regulations under the Transportation Development Act, the maximum apportionment that can be made available towards the CTSA is limited to five percent of the county's local transportation fund available for "community transit service" (Public Utilities Code, Section 99275(a)).





Consolidated Transportation Services Agency

**San Joaquin Council of Governments
Board of Directors**

May 24, 2018

Donna DeMartino
Chief Executive Officer

What is a CTSA?



CTSA is an agency that coordinates and provides social service transportation, including services for the elderly and individuals with disabilities who cannot use conventional transit services

Regional functions and benefits of CTSA

- One centralized location for information on all countywide transit services
 - RTD, ACE, Tracer, Grapeline, Manteca Transit, eTrans, Blossom Express
 - ADA services
 - NEMT
 - Veteran's and health and human service transportation
- Reduction of duplicative costs and staff time
- Regional access to UBER and UBER-type services

Customer Benefits

- Easier access to regional transit services and information
- Enhanced regional mobility options

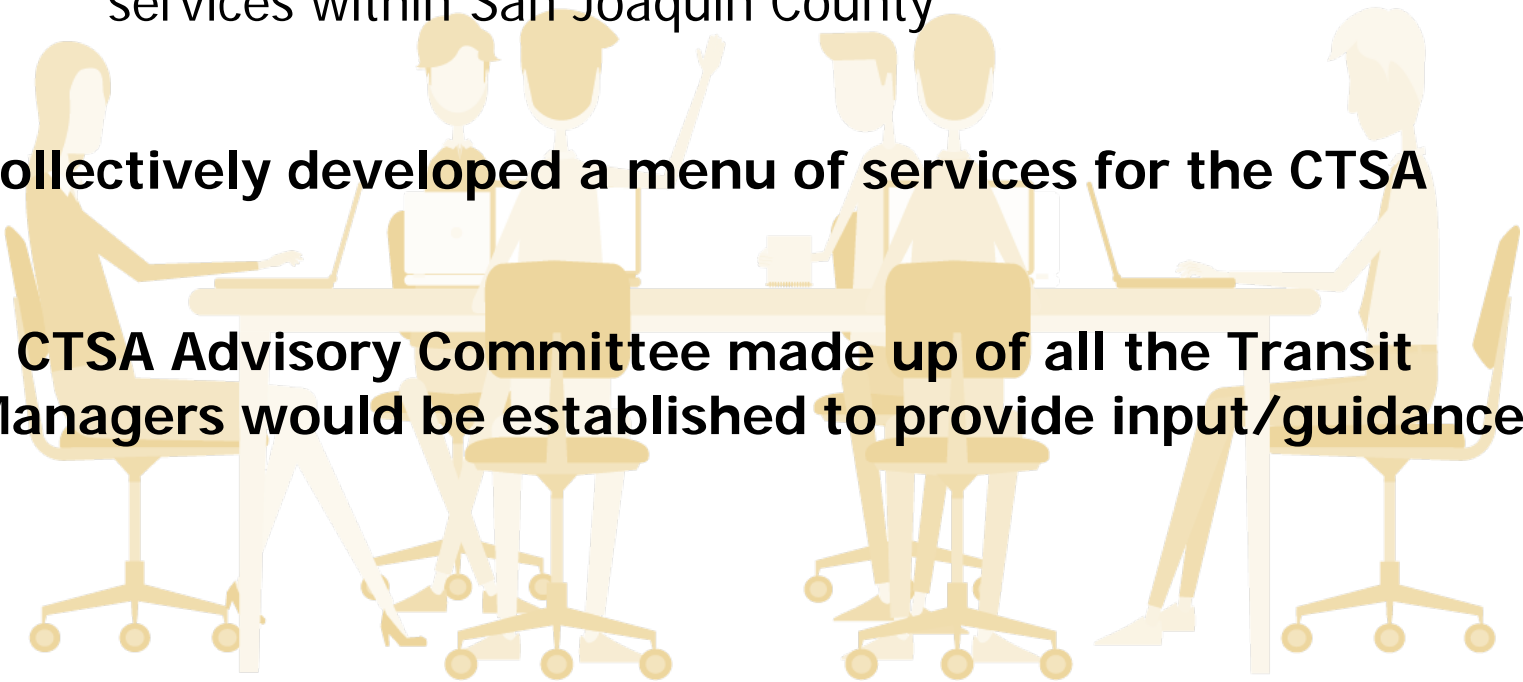
Background

Countywide Transit Operators have been meeting regularly

- Tracy, Manteca, Lodi, Escalon, and RTD
- Primary objective is to enhance coordination of transit services within San Joaquin County

Collectively developed a menu of services for the CTSA

A CTSA Advisory Committee made up of all the Transit Managers would be established to provide input/guidance



Proposed Services Would be Available for all Residents of All Cities



ADA Assessment

Travel Training

Volunteer Incentive Program

Discount Fare Card

FREEdom Program

RTD Go!

Mobility-On-Demand

ADA Assessment

Provides professional, experienced, regional in-person eligibility assessments for ADA paratransit services

Benefits

- Process is streamlined and consistent
- Reduces staff time of City Employees
- Offers a single point of contact for customers
- Requires only one certification to use all six transit systems countywide
- Introduces customers to other transit options and travel training



Travel Training

Offers dedicated professionals who will teach seniors and persons with disabilities how to use available public transit options throughout the county and beyond

Benefits

- Provides additional mobility options for customers
 - With more coming soon!
- Increases fixed-route ridership
- Minimizes operational costs



Volunteer Incentive Program (VIP)

Offers a mileage reimbursement service that enables ADA-certified passengers to compensate relatives, friends, and neighbors for providing them with transportation assistance

Benefits

- Provides a flexible and customized transportation option
- Allows customers who are fragile or returning from dialysis to ride with friends or family members
- Shifts cost away from more expensive paratransit demand response trips
- No cost to passenger
- Driver is paid by CTSA



Discount Fare Card

Meets the Federal Transportation Administration (FTA) stipulation that says, as a grantee under Section 5307, agencies “must allow the elderly, persons with disabilities, and Medicare cardholders to ride the fixed route services for a fare that is not more than one-half the base fare charged other persons”

Benefits

- Offers a centralized process with one card for all transit systems
- Reduces staff time



FREEdom Program

Allows ADA-certified customers to ride fixed-routes free of charge

Benefits

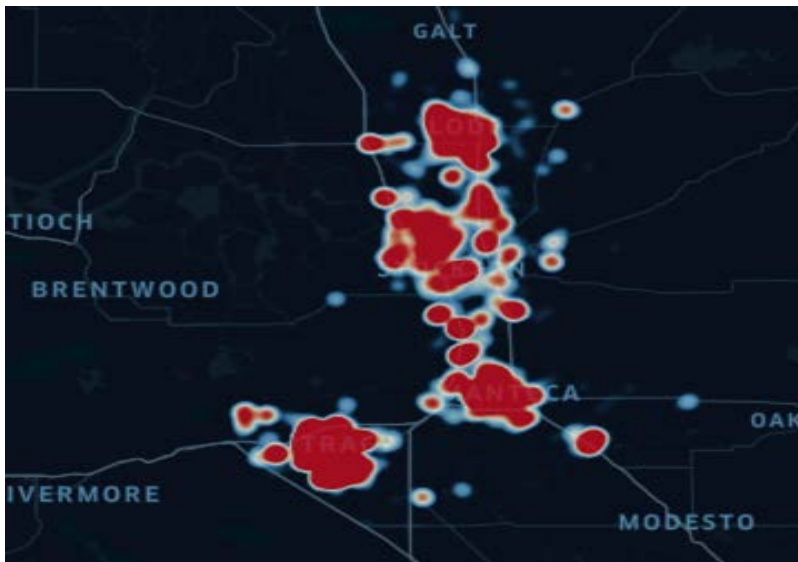
- Provides customers with additional mobility options to travel without requiring reservations
- Minimizes paratransit cost by shifting demand to a less expensive option



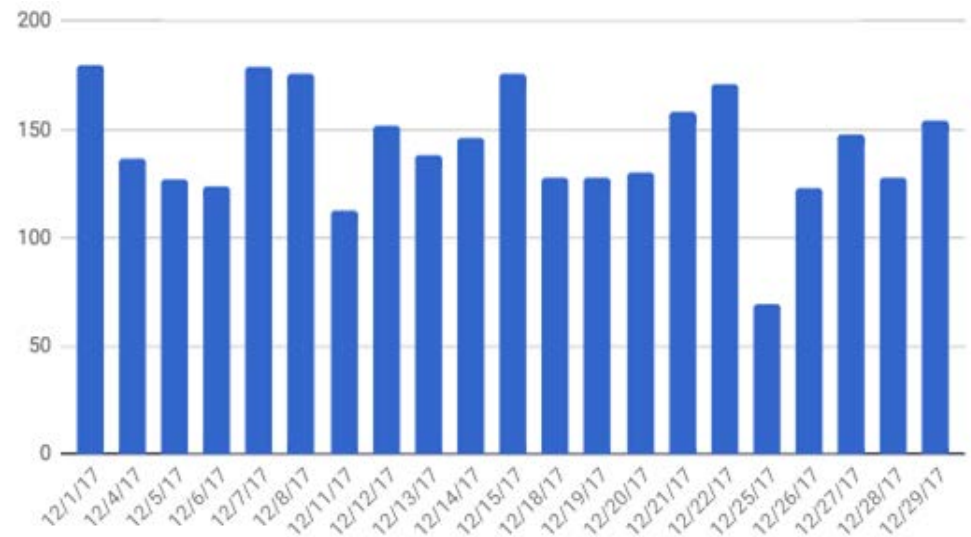
RTD Go!

- Provides Uber subsidies to on-demand trips originating or ending outside of the service area or at a transit center
- RTD's pilot project shows these trips are being used throughout the County

Heat map of trip origins and destinations



Trips by Day



Mobility On-Demand - COMING SOON

RTD's own UBER-type service, provided in accessible vehicles, strategically placed around the County, and operated by professionally trained and tested operators

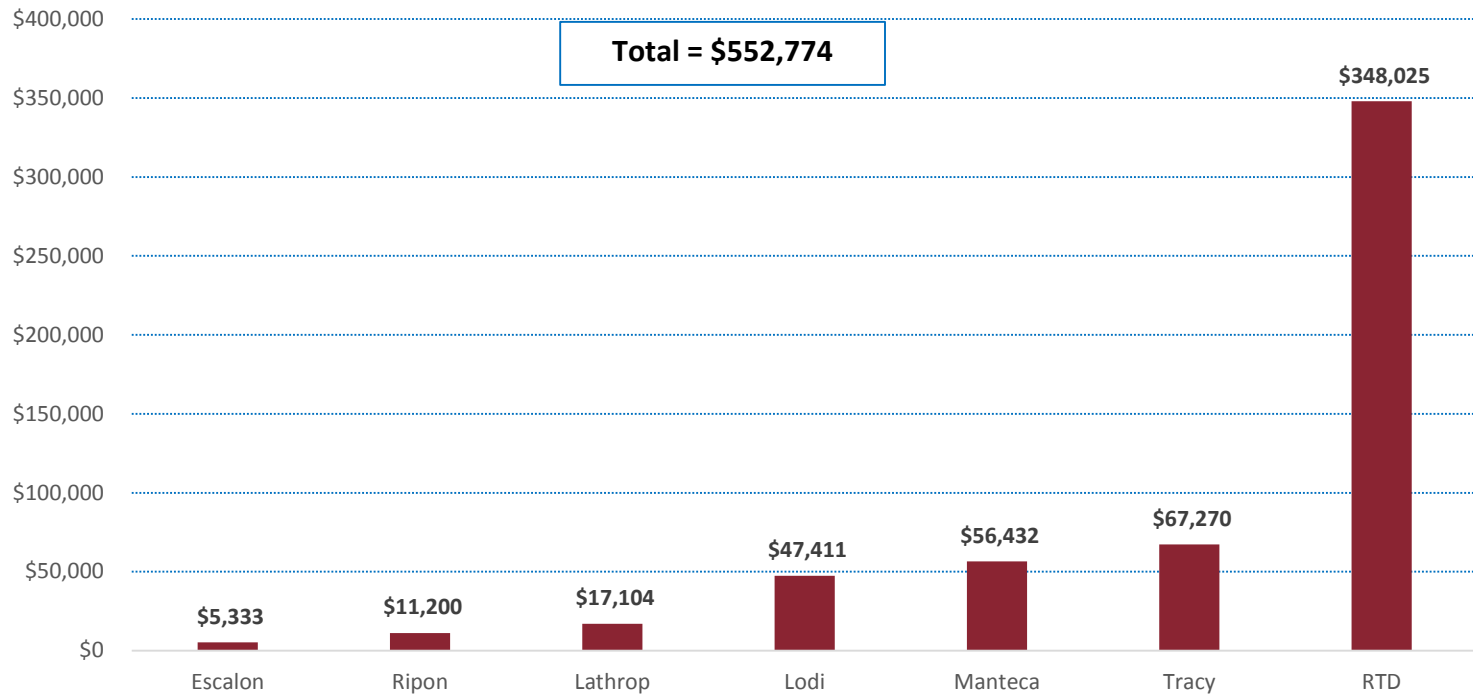
Offers a multimodal approach to increase mobility and connectivity by integrating new tools like smart phone apps, ride-sharing, and demand-responsive services



Benefits

- Provides service to areas currently not being served and first/last mile connections
- More cost effective than offering fixed-routes in low density areas
- Regular connections between Tracy and Mountain House; between Manteca, Ripon, Escalon, and Modesto; and the areas around Lathrop and Lodi and more.

LTF Contribution by Agency



- RTD will provide approximately 63% of the total amount
- Each City will contribute only 2% of their LTF and receive access to all CTSA services
- Estimated cost for one year, true up will be done at end of year

