



# STUDY SESSION

Joint Study Session of  
Valley Metro RPTA and Valley Metro Rail  
Boards of Directors

Date:  
December 1, 2022

Starting Time  
11:15 a.m.

Location:  
Valley Metro  
Lake Powell Conference Room (10A)/Webex  
101 N. 1<sup>st</sup> Avenue, 10<sup>th</sup> Floor  
Phoenix

**If you require assistance accessing the meetings on the  
10<sup>th</sup> floor, please go to the 14<sup>th</sup> floor or call 602.262.7433.**



# Study Session Notice & Agenda

November 23, 2022

**Joint Study Session Agenda  
Valley Metro RPTA and Valley Metro Rail  
Thursday, December 1, 2022  
Board room/Webex, 101 N. 1st Avenue, 10<sup>th</sup> Floor  
11:15 a.m.**

Study sessions provide a less formal setting for the Boards of Directors to discuss specific topics, at length, with each other and Valley Metro staff members. Work study session provide an opportunity for staff to receive direction from the Boards and for the public to observe the discussions.

1. Demand Response Services Update

Tom Young, Accessible Transit Services Manager, will provide a comprehensive overview of Valley Metro's Demand Response Services Update (ADA Paratransit and RideChoice).

2. APTA Peer Review

APTA conducts the Peer Review Program for member organizations on a broad range of issues including operations, safety, organizational efficiency and program management.

The APTA Peer Review process is well established as a valuable resource to the public transit industry.

Highly experienced and respected transit professionals voluntarily provide their time and support to address the scope required.

The panel conducted this peer review from August 21- 26, 2022, through field observations and a series of briefings and interviews with Valley Metro staff and member city representatives.

Qualified sign language interpreters are available with 72 hours notice. Materials in alternative formats (large print, audiocassette, or computer diskette) are available upon request. For further information, please call Valley Metro at 602-262-7433 or TTY at 602-251-2039. To attend this meeting via teleconference, contact the receptionist at 602-262-7433 for the dial-in-information. he supporting information for this agenda can be found on our web site at [www.valleymetro.org](http://www.valleymetro.org).

# Valley Metro Study Session

## Demand Response Services Update (RideChoice and ADA Paratransit)

Tom Young, Accessible Transit Services Manager

December 1, 2022



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## Introduction



- **Valley Metro's Current Demand Response Programs**
  - ADA Complementary Paratransit – Federal Regulations
  - RideChoice Program – Alternative to ADA service
- **Successes and Challenges**
  - Regional Paratransit
  - RideChoice
- **National Best Practices relevant to our challenges**
  - Regional Paratransit
  - RideChoice
- **Future System Updates**
  - Joint Broker
  - ADA Paratransit Operations and Maintenance
  - Microtransit

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# Valley Metro Current Demand Response Programs



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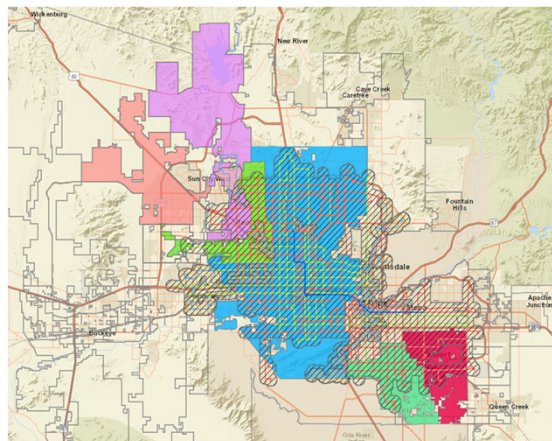
## ADA Complementary Paratransit



ADA has defined minimum standards

Six (6) service criteria that must be met:

1. **Service area**  
(within  $\frac{3}{4}$  mile of fixed route or rail station)
2. **Hours and days of service** (same as regular fixed route or rail service)
3. **Response time** (trip reservations – next day and up to 14-days)
4. **Fares** (no more than 2x's fixed route base fare)



5. **Absence of capacity constraints** (must perform all trips requested)
6. **Operating without regard to trip purpose** (shopping is as important as dialysis)

**Eligibility** (People with disabilities that functionally cannot use the bus)

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# ADA Complementary Paratransit

## Service Area Overview



| Jurisdiction                     | Service Area                  | Extra Notes                                                                               |
|----------------------------------|-------------------------------|-------------------------------------------------------------------------------------------|
| Avondale                         | Mandated 3/4 mile             |                                                                                           |
| Chandler                         | Entire City                   |                                                                                           |
| El Mirage                        | Mandated 3/4 mile             |                                                                                           |
| Fountain Hills                   | No Paratransit service area   | 100% RideChoice only                                                                      |
| Gilbert                          | Entire Town                   |                                                                                           |
| Glendale                         | Mandated 3/4 mile             | Provides own services inside city/own agency                                              |
| Goodyear                         | Mandated 3/4 mile             |                                                                                           |
| Litchfield Park                  | Mandated 3/4 mile             |                                                                                           |
| Maricopa County - Unincorporated | Mandated 3/4 mile             |                                                                                           |
| Mesa                             | Mandated 3/4 mile             |                                                                                           |
| Paradise Valley                  | Mandated 3/4 mile             |                                                                                           |
| Peoria                           | Mandated 3/4 mile             | Provides own services inside city/own agency                                              |
| Phoenix                          | Entire city south of Jomax Rd | Provides own services inside city/Contracted to MV Transit                                |
| Scottsdale                       | Mandated 3/4 mile             |                                                                                           |
| Surprise                         | No Paratransit service area   | Non-ADA trips for ADA certified person going outside of Surprise for work or medical only |
| Tempe                            | Mandated 3/4 mile             |                                                                                           |
| Tolleson                         | Mandated 3/4 mile             |                                                                                           |
| Youngtown                        | Mandated 3/4 mile             |                                                                                           |

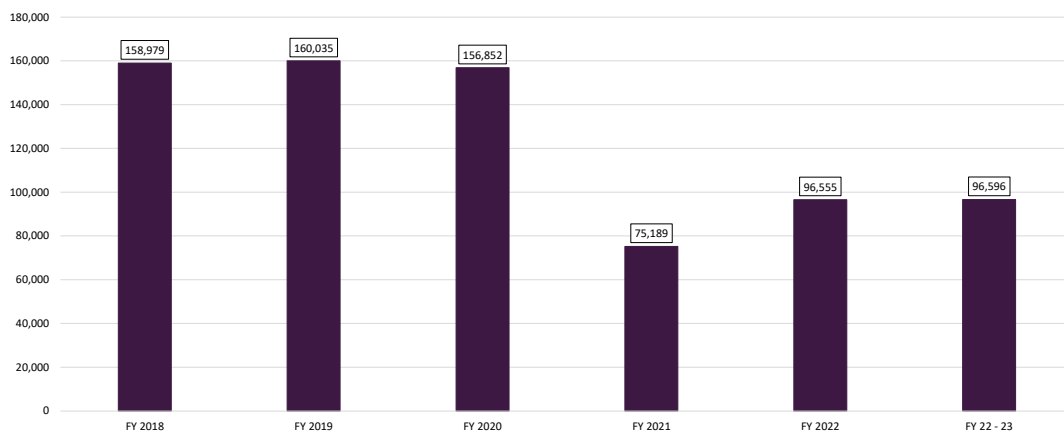
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# ADA Complementary Paratransit



ADA Paratransit Trips  
July through October



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# Alternative Transportation (RideChoice)



RideChoice is Valley Metro's alternative transportation program

**People with disabilities**  
(ADA eligible)

**Seniors (65+)**

**Qualifying Veterans**

**Qualifying Low Income**

**Range of Providers**  
(Riders choose their preferred provider)



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## RideChoice



### Trips Option Plans (Destination in Maricopa County)

- 20 trips per month: \$3 per trip up to 8 miles and then an additional \$2 per mile (starting at the ¼ mile)
- 50 trips per month: \$3 per trip up to 8 miles and then an additional \$2 per mile (starting at the ¼ mile)

### Mileage Option Plan

- 400 miles per month: \$3 per trip with a maximum of 50 miles per trip; entire trip must be within Maricopa County

### Eligibility

- People with disabilities (ADA eligible)
- Seniors (65+)
- Qualifying Veterans
- Qualifying Low Income

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# RideChoice

## Service Area Overview

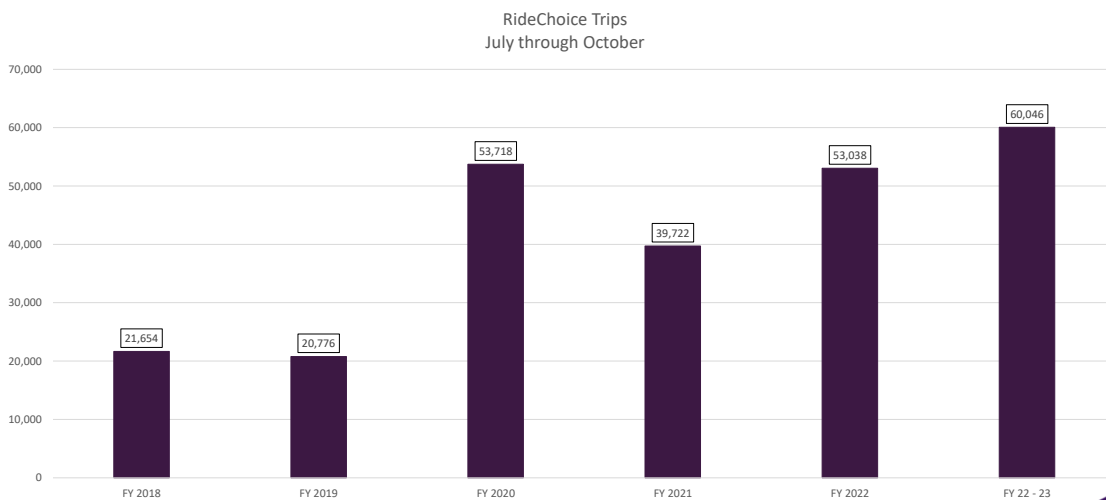


| Jurisdiction                     | RideChoice                                                                | Extra Notes                                                         |
|----------------------------------|---------------------------------------------------------------------------|---------------------------------------------------------------------|
| Avondale                         | ADA certified customers                                                   |                                                                     |
| Chandler                         | Seniors over 65 or ADA certified customers                                |                                                                     |
| El Mirage                        | No                                                                        |                                                                     |
| Fountain Hills                   | Seniors over 65 or ADA certified customers                                | 100% RideChoice only                                                |
| Gilbert                          | ADA certified customers                                                   |                                                                     |
| Glendale                         | No                                                                        |                                                                     |
| Goodyear                         | ADA certified customers                                                   |                                                                     |
| Litchfield Park                  | No                                                                        |                                                                     |
| Maricopa County - Unincorporated | ADA certified customers                                                   |                                                                     |
| Mesa                             | ADA certified customers                                                   |                                                                     |
| Paradise Valley                  | No                                                                        |                                                                     |
| Peoria                           | No                                                                        |                                                                     |
| Phoenix                          | No                                                                        |                                                                     |
| Scottsdale                       | ADA certified customers                                                   | RideChoice or Scottsdale Cab Connection (Cannot have both of these) |
| Surprise                         | Seniors over 65 or ADA certified customers, some low income, and Veterans |                                                                     |
| Tempe                            | Seniors over 65 or ADA certified customers                                |                                                                     |
| Tolleson                         | ADA certified customers                                                   |                                                                     |
| Youngtown                        | No                                                                        |                                                                     |

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# RideChoice - Success



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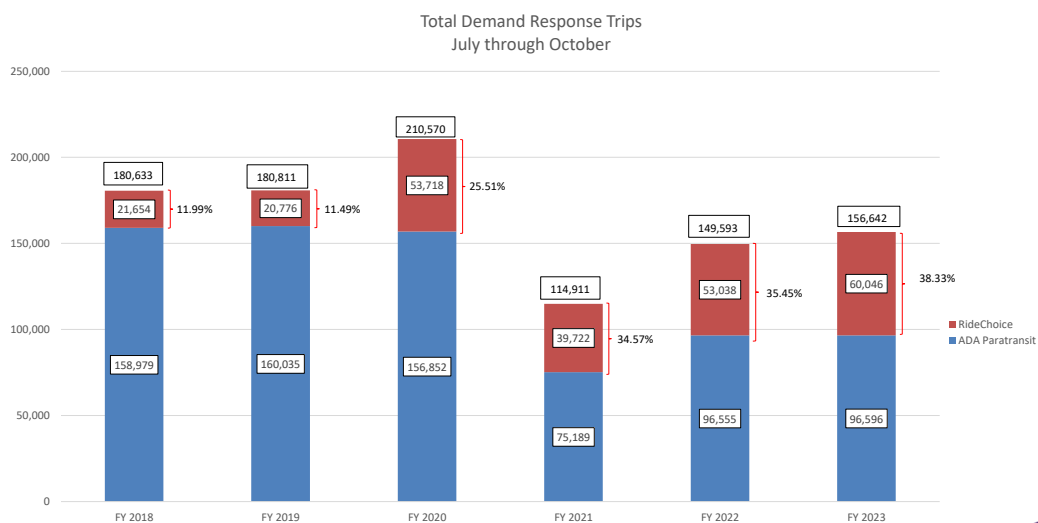
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# Successes and Challenges



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## Total Demand Response Trips - Success



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## Impacts of the Pandemic - Success



### ADA Paratransit

| Personnel Recruitment, Hiring, Training and Development |                           |           |                    |                         |           |                    |
|---------------------------------------------------------|---------------------------|-----------|--------------------|-------------------------|-----------|--------------------|
| Transdev                                                | Initial Pandemic Recovery |           |                    | Today's Staffing Levels |           |                    |
|                                                         | Budgeted Positions        | Vacancies | % Vacant Positions | Today's Staffing        | Vacancies | % Vacant Positions |
| Paratransit Operators                                   | 85                        | 16        | 19 %               | 89                      | 0         | Overfill           |
| Road Supervisors                                        | 5                         | 1         | 20 %               | 5                       | 1         | 0%                 |
| Dispatchers                                             | 8.5                       | 1.5       | 18 %               | 8.5                     | 0         | 0%                 |
| Schedulers                                              | 1.5                       | 0         | 0                  | 1.5                     | 0         | 0%                 |
| Reservationist                                          | 23                        | 8.5       | 37 %               | 20                      | 3         | 13%                |
| Data Clerks                                             | 2                         | 1         | 50 %               | 1                       | 1         | 50%                |
| Mechanics                                               | 5                         | 2         | 40 %               | 5                       | 2         | 40%                |
| Utility Workers                                         | 6                         | 3         | 50 %               | 3                       | 3         | 50%                |
| Operations Manager                                      | 1                         | 0         | 0                  | 1                       | 0         | 0                  |
| Customer Service Manager                                | 1                         | 0         | 0                  | 1                       | 0         | 0                  |
| Maintenance Manager                                     | 1                         | 0         | 0                  | 1                       | 0         | 0                  |
| Safety & Training Manager                               | 1                         | 0         | 0                  | 1                       | 0         | 0                  |
| Safety & Training Supervisor                            | 1                         | 0         | 0                  | 1                       | 0         | 0                  |
| Human Resources Manager                                 | 1                         | 0         | 0                  | 1                       | 0         | 0                  |

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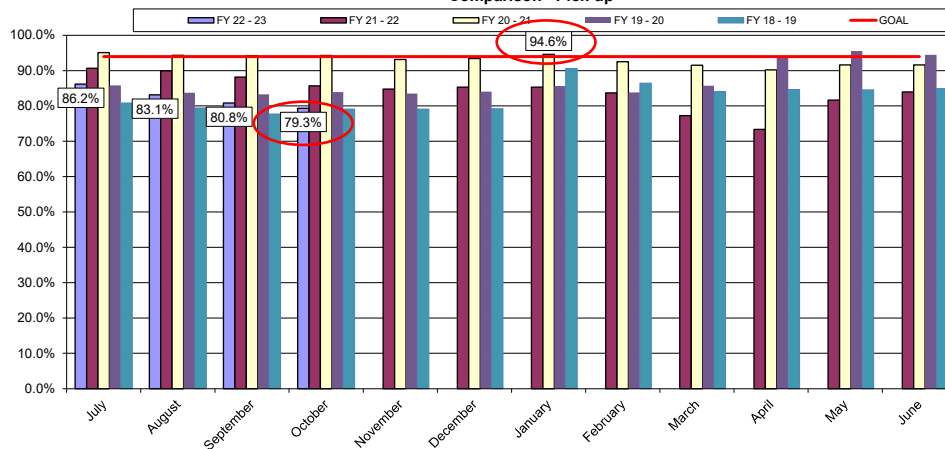
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## Impacts of the Pandemic - Challenge



### ADA Paratransit

#### On-Time Performance Comparison - Pick-up



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## Contract Issues



- On September 17, 2020, the Board authorized resolicitation of the Paratransit and RideChoice programs.
- 120-day extension of Transdev contract (ADA Paratransit Provider).
- 1-year extension of American Logistics contract (RideChoice Broker).

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## Contract Issues - Challenge



- RideChoice Broker demanded 41.5 % increase in rates to agree to extension.
  - Required 1-year non-competitive contract with MJM Innovation (Incumbent broker)
- Initial Administrative Broker RFP did not produce competitive bids
  - Required 1-year extension to Transdev (ADA Paratransit) contract
  - Reprocured RideChoice services under 1-year contract

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# Impacts of the Pandemic - Challenge



## RideChoice

| Service Provider Name                | Amb | W/C | Transition Comment                              |
|--------------------------------------|-----|-----|-------------------------------------------------|
| Apache Medical Transportation        | Yes | Yes | Dropped for large rate increase                 |
| AZ Med Transportation, LLC           | No  | Yes | Out of business                                 |
| East Valley Rides, LLC               | Yes | Yes |                                                 |
| Health Lift                          | No  | Yes |                                                 |
| JM Med Trans                         | Yes | Yes | Out of business                                 |
| Medstar Medical Transportation LLC   | Yes | Yes | Pulled out of AZ                                |
| MM2 Trans                            | No  | Yes | Out of business                                 |
| MO MedTrans LLC                      | Yes | Yes |                                                 |
| Quality Transport Service of Arizona | No  | Yes | Suspended during business merger                |
| Safewing                             | Yes | Yes |                                                 |
| Sharif Joes Transport                | Yes | Yes |                                                 |
| VIP Taxi                             | Yes | No  |                                                 |
| White Horse Medical                  | Yes | Yes | Stopped shortly while adding partner & vehicles |
| Wheels on Wheels                     | Yes | Yes |                                                 |
| Uber                                 | Yes | No  |                                                 |

### How Many Uber Drivers Are There in 2022? | Ridester.com

While Uber continues to face a driver shortage, the number of Uber drivers throughout the United States has shown significant growth since 2009.

Feb 22, 2022 · Uploaded by CNBC Television

<https://fortune.com/2022/03/07/uber-lyft-drivers-ga...>

### Uber and Lyft drivers' take-home pay plummets as gas prices ...

Mar 7, 2022 — 27 were 18% higher than in January 2021, a period reflecting pre-driver shortage pricing, a sign that driver inventory hasn't kept up post- ...

<https://www.marketplace.org/2022/01/04/transit-syst...>

### Transit systems struggle to find enough bus drivers

Matt Levin Jan 4, 2022. Heard on: Higher wages from private competitors and a workforce near retirement has led to a bus driver shortage.

Impacts of rising gas prices

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# RideChoice Provider Recruitment - Success



| Service Provider                              | Ambulatory Vehicles | Accessible Vehicles | Comments                    |
|-----------------------------------------------|---------------------|---------------------|-----------------------------|
| 1 A1 Transit                                  | Yes                 | 5                   | New Provider                |
| 2 American Pony Express (VIP Taxi)            | Yes                 | No                  | New Provider                |
| 3 AZ Care Transport                           | Yes                 | No                  | New Provider                |
| 4 Canyon Taxi                                 | Yes                 | 23                  | New Provider                |
| 5 East Valley Rides (EVR)                     | Yes                 | 10                  |                             |
| 6 HealthLift Non-emergency Med Trans of AZ    | Yes                 | 15                  |                             |
| 7 Lyft                                        | Yes                 | No                  | (Finalizing API Connection) |
| 8 MO MedTrans                                 | Yes                 | 9                   |                             |
| 9 Quality Transport Services of Arizona (QTS) | Yes                 | 41                  |                             |
| 10 L&S Transportation                         | Yes                 | 3                   | New Provider                |
| 11 Safewing                                   | Yes                 | 4                   |                             |
| 12 Sharif Joes Transport                      | Yes                 | 2                   |                             |
| 13 Uber                                       | Yes                 | No                  |                             |
| 14 UZURV                                      | Yes                 | No                  | New Provider                |
| 15 Wheels on Wheels                           | Yes                 | 6                   |                             |
| 16 White Horse Medical Transportation         | Yes                 | 3                   |                             |
| Accessible Vehicles                           |                     | 121                 |                             |

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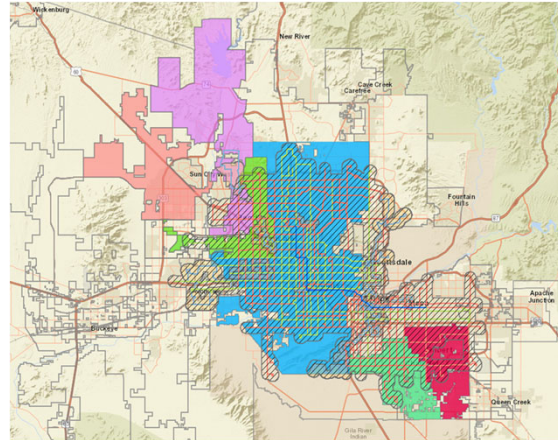
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# ADA Complementary Paratransit Challenges



Data is based on July thru Sept. 2022

|                    | All Valley Metro ADA Paratransit Trips |                |                 | Regional Trips Only |                |                 | Difference  |
|--------------------|----------------------------------------|----------------|-----------------|---------------------|----------------|-----------------|-------------|
|                    | All Trips                              | All Miles      | Avg Trip Length | Trips               | Miles          | Avg Trip Length |             |
| AVONDALE           | 1,644                                  | 19,749         | 12.01           | 1,644               | 19,749         | 12.01           | 0.00        |
| CHANDLER           | 6,685                                  | 77,454         | 11.59           | 1,557               | 33,574         | 21.56           | 9.98        |
| EL MIRAGE          | 12                                     | 118            | 9.83            | 12                  | 118            | 9.83            | 0.00        |
| GILBERT            | 6,402                                  | 72,436         | 11.31           | 749                 | 19,977         | 26.67           | 15.36       |
| GLENDALE           | 5,424                                  | 70,401         | 12.98           | 5,424               | 70,401         | 12.98           | 0.00        |
| GOODYEAR           | 447                                    | 8,589          | 19.21           | 447                 | 8,589          | 19.21           | 0.00        |
| MARICOPA COUNTY    | 2,404                                  | 30,869         | 12.84           | 2,404               | 30,869         | 12.84           | 0.00        |
| MESA               | 13,186                                 | 134,002        | 10.16           | 2,628               | 56,724         | 21.58           | 11.42       |
| MOBILITY CENTER    | 1,130                                  | 18,737         | 16.58           | 1,130               | 18,737         | 16.58           | 0.00        |
| OTHER              | 286                                    | 3,743          | 13.09           | 286                 | 3,743          | 13.09           | 0.00        |
| PARADISE VALLEY    | 230                                    | 1,999          | 8.69            | 230                 | 1,999          | 8.69            | 0.00        |
| PEORIA             | 2,544                                  | 27,761         | 10.91           | 1,851               | 24,321         | 13.14           | 2.23        |
| PHOENIX            | 20,361                                 | 310,595        | 15.25           | 20,361              | 310,595        | 15.25           | 0.00        |
| SCOTTSDALE         | 4,569                                  | 49,327         | 10.80           | 2,122               | 32,177         | 15.16           | 4.37        |
| SURPRISE           | 957                                    | 13,931         | 14.56           | 957                 | 13,931         | 14.56           | 0.00        |
| TEMPE              | 4,865                                  | 46,691         | 9.60            | 1,735               | 24,454         | 14.09           | 4.50        |
| TOLLESON           | 256                                    | 3,005          | 11.74           | 256                 | 3,005          | 11.74           | 0.00        |
| YOUNGTOWN          | 425                                    | 3,963          | 9.32            | 248                 | 3,550          | 14.32           | 4.99        |
| <b>Grand Total</b> | <b>71,827</b>                          | <b>893,371</b> | <b>12.44</b>    | <b>44,041</b>       | <b>676,513</b> | <b>15.36</b>    | <b>2.92</b> |



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## National Best Practices



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## Best Practices



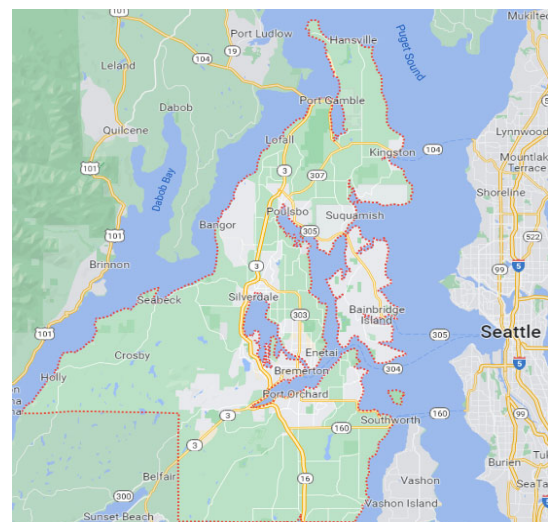
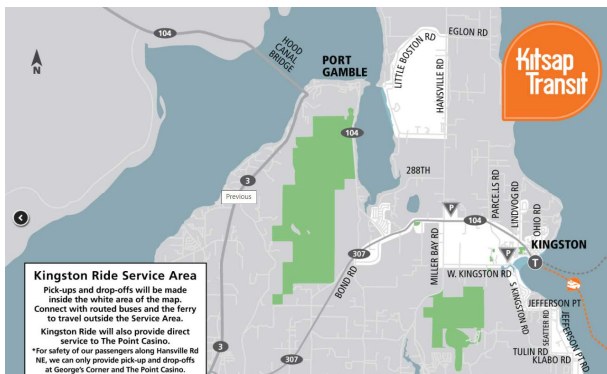
- Kitsap County, Washington – General Public Dial-A-Ride as feeder service to Fixed Route, Ferry Service, and primary mode in rural areas since the mid-1980s.
- Pennsylvania – Human Services / Public Transit funding and service coordination (Medical Assistance, Mental Health, People with Disabilities (PwD), Area Agency, etc.).
- Pennsylvania – Public Transit Coordination / Consolidation efforts.
- Jacksonville Transit Authority – Co-mingling of all Demand Response service trips (ADA Paratransit, Microtransit, etc.).
- RTD Denver – Pilot program with Uber for wheelchair-accessible (WAV) vehicles.
- Dallas Area Rapid Transit – GoLink Service – demand response connector services.

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## Best Practices

Kitsap County, Washington – General Public Dial-A-Ride as feeder service to Fixed Route, Ferry Service, and primary mode in rural areas since mid-1980s.



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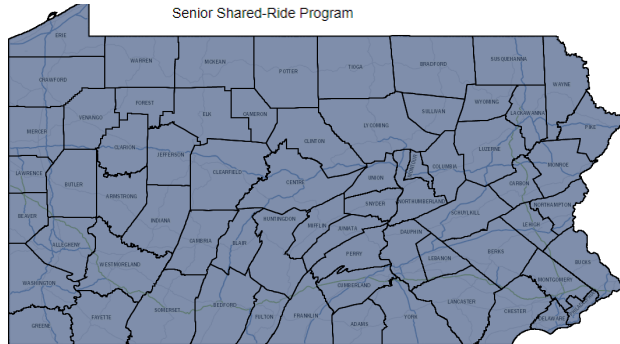
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## Best Practices

Pennsylvania – Human Services / Public Transit funding and service coordination.



ADA Complementary Paratransit Service  
Medical Assistance Transportation Program  
Persons With Disabilities Half-Fare Program  
Persons with Disabilities Program  
Senior Free Transit  
Senior Shared-Ride Program



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## Best Practices

### • Pennsylvania – Public Transit Coordination / Consolidation efforts.

Lancaster County officials and Red Rose Transit Authority leaders took a little trip just over the Berks County line Thursday morning to meet with their Berks counterparts — and celebrate a transit consolidation nearly a year in the making.

They have established [the new South Central Transit Authority to oversee both the Lancaster-area RRTA and the Berks Area Regional Transit Authority](#).

The consolidation is to save the two counties nearly \$4.8 million over the next five years.

Six staff positions were eliminated in the merger, but much of the savings will be in local matching funds, officials said. Over five years, Berks County will save \$2,804,169 and Lancaster County will save \$1,726,081, or around \$345,000 a year.

Because of the cost savings, SCTA also is considering adding Sunday service in Berks County and extending service to Route 41 in the Gap area, to reach the newly expanded Urban Outfitters and the Gap Area Shopping Center.

[Rabbittransit](#) and [Capital Area Transit](#) plan to merge into a single entity to be called the Susquehanna Regional Transportation Authority.

The two agencies said that the merger “will provide opportunities for increased levels of mobility and result in improved efficiencies for operations.”

“The new, joint authority will be able to leverage the buying power of a larger organization, eliminate duplicative operations and have greater opportunity to qualify for discretionary grants,” the agencies said in a press release.

The agencies said that as a result of the merger, the region would see enhanced services, including:

- A single fare payment system
- Expanded call center hours
- Improved connections to large regional employers
- Enhanced service to regional health care programs
- Enhanced connectivity between campuses for students

Rabbittransit provides transportation services in York, Adams, Columbia, Cumberland, Franklin, Montour, Northumberland, Perry, Snyder and Union counties to nearly 8,000 people a day. Capital Area Transit provides transportation services in Cumberland and Dauphin counties to around 8,000 people a day.

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## Best Practices



### Jacksonville Transit Authority – Co-mingling of all Demand Response service trips (ADA Paratransit, Microtransit, etc.).

The Jacksonville Transportation Authority (JTA) is seeking a contract with an entity (Proposer) to be fully responsible for the scheduling, delivery and management of all non-fixed route, land-based transportation services within the agency. Not only will this Proposer be responsible to provide transportation services, but the Proposer will also work collaboratively with the JTA to analyze and plan new services, modify existing services, and design and implement a platform to facilitate collaboration, coordination and sharing of resources among the JTA's Paratransit, Microtransit, and other fully accessible On-Demand services for all of our passengers.

This integration and comingling of services and service delivery shall be achieved using a Mobility Assimilation Platform (MAP), which will be jointly developed with the JTA and implemented by the Proposer during the second Phase of the project. This MAP will encourage and permit the blending of transportation modes, by offering passengers a broader array of appropriate choices on the front end, and by enabling service scheduling and delivery decisions to be flexibly and efficiently executed on the back end.



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## Best Practices



### RTD Denver – Pilot program with Uber for wheelchair-accessible (WAV) vehicles.

#### ACCESS-A-RIDE CUSTOMERS: REGISTER FOR ACCESS-ON DEMAND WITH UBER

- For customers with current Access-a-Ride certification
- Curb to Curb service
- Schedule all trips in the Uber app
- Wheelchair accessible vehicles (WAV) available
- Four (4) Trips per day
- Up to 60 trips per month
- Uber service is available within the RTD Service area
- For airport trips, [click here for info](#)
- **HOW MUCH DO I PAY?**
  - The first \$2 of UberX, XL, or WAV trips will be charged to customer's personal payment
  - RTD will subsidize up to an additional \$20 of each fare.
  - If the total trip cost is over \$22, you will be responsible for any additional balance over that amount.

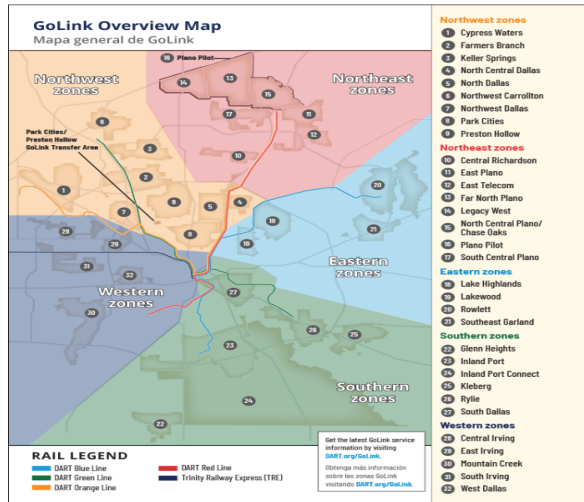


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# Best Practices

## Dallas Area Rapid Transit – GoLink Service – demand response connector services.



**How does GoLink work?**  
It's easy to get moving with GoLink. This is how you book and pay for trips.  
Your valid contactless DART fare covers your GoLink trips at no additional cost.

### Two Ways to Book a GoLink Trip



#### 1 With the GoPass® app

- Select "Plan" within the app and enter your current location and desired destination. If GoLink is available for your trip, it will show as an option in your planning results.

- Choose GoLink to proceed with your booking.



#### 2 By calling 214-515-7272

- Reservations are accepted 4 a.m. - 8 p.m. daily.
- Only same-day trips are accepted.
- For the Inland Port Connect zone, call 877-631-5278.

### Two Ways to Pay

Your GoLink trip is covered by a valid contactless DART fare purchased using one of these forms of payment.



#### 1 Credit or debit card



#### 2 GoPass® Tap card

To receive the best fare, use the GoPass app or a GoPass Tap card. You can link your GoPass Tap card to your GoPass account in the app. When paying with a GoPass Tap card, each rider must have their own card.

GoLink does not accept cash fares, paper passes or vouchers on board. Riders that book with a credit or debit card with a GoLink reservationist will be issued a GoLink one-way fare.

To learn about available fare types, please visit [DART.org/fares](http://DART.org/fares).

### GoLink vehicles come in all shapes and sizes!

While DART offers GoLink vans like the one pictured, you may also ride in vehicles similar to the ones provided by other rideshare services. Here are a few examples.

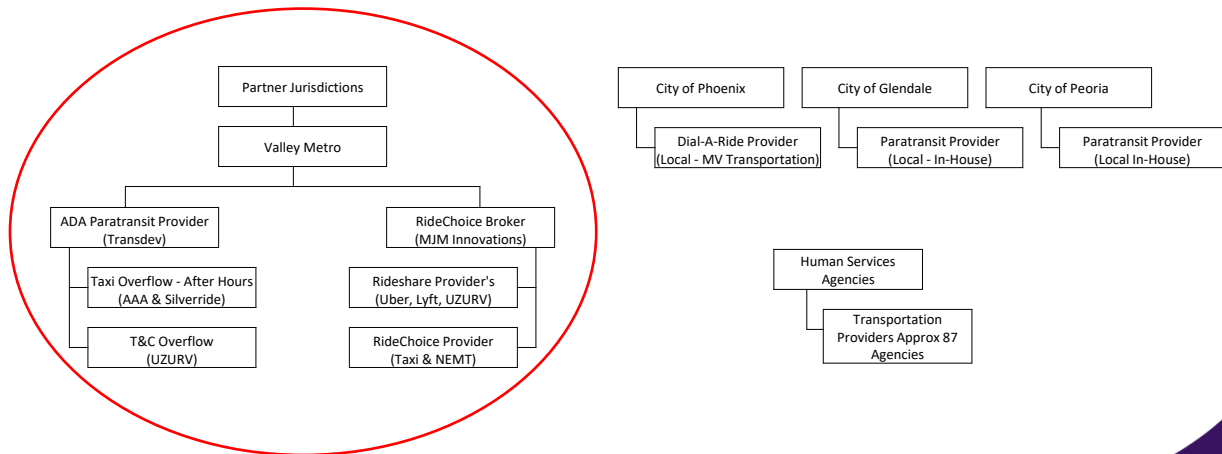


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## Future System Updates



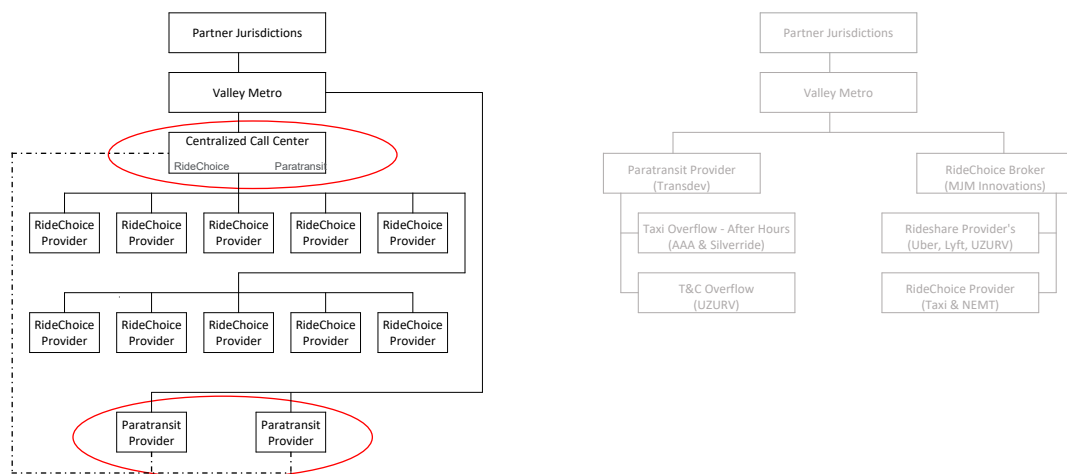
# Service Delivery in the Valley



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# Service Delivery Model



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## Roadmap



### • Administrative Broker Services (Demand Response) RFP – Tentative Schedule

- City of Phoenix review – September 8, 2022
- RFP released September 2022
- Pre-Proposal Conference – October 4, 2022
- Proposals due - November 17, 2022
- Recommendation to Board March 15, 2023

Cleared COP 9-16-2022

### • Operations and Maintenance RFP – Tentative Schedule

- City of Phoenix review – September 8, 2022
- RFP released September 9, 2022
- Pre-Proposal Conference September 26, 2022
- Proposals due – November 10, 2022
- Recommendation to Board March 15, 2023

Cleared COP 9-8-2022

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## Roadmap



### • Paratransit scheduling and dispatch software

- Trapeze from Transdev to Valley Metro IT servers – **Went live on September 23, 2022**
- Expand IVR implementation – **Finalizing Implementation Plan**
- PASS-WEB, PASS-Mobile, EZ-Wallet implementation for ADA Paratransit – **Finalizing Implementation Plan**
- RideChoice program, Expand TripBroker, PASS-WEB, EZ-Wallet implementation – December 2023 – **Items under review – Trapeze must develop software**

### • Valley Metro currently partnering with Trapeze to develop modules that will manage multiple modes of demand response services (Paratransit, RideChoice, Microtransit, etc.)

### • Next Steps – Cloud-based solution (TCMS)

- Potential Partnerships – City of Phoenix and City of Peoria

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## Desired Outcomes



- **Combined Administration of RideChoice and ADA Paratransit:**
  - Consistent education to customers on available services
  - Appropriate service for a specific trip
  - Improved service quality
  - Improved efficiencies
  - Elimination of conflict of interest in trip assignments
- **Separate Operations and Maintenance Provider:**
  - Focus on Operator training and performance
  - Focus on Maintenance and cleaning of vehicles
- **Additional Software modules:**
  - Reduced phone calls for reservations
  - Track vehicle arrival times without phone call
  - Pay fare without needing cash
- **Coordinate common software resources (mapping, customer files) with other public agencies**
- **Develop a system to manage all demand response programs (ADA Paratransit, RideChoice, Microtransit, etc.) and gain efficiencies by co-mingling trips**

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## Conclusion



### Implementation of Changes described aimed at:

- **Position Valley Metro to manage all demand response services in valley including Microtransit**
- **Enhance mobility options for all valley residents without regard to abilities (disability, low income, LEP, etc.)**
  - Potential changes to **minimum** ADA service criteria
  - Enhanced Customer service
  - Improved service quality
  - Improved efficiencies
  - Focus on Operator training and performance
  - Focus on Maintenance and cleaning of vehicles
  - Reduced phone calls for reservations
  - Track vehicle arrival times without phone call
  - Pay fare without needing cash

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Thank You







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**Valley Metro Operations & Maintenance Peer Review  
Board of Directors Briefing  
December 1, 2022**

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## Peer Review Panel Members



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**Andrew Skabowski**  
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American Public Transportation Association  
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## Agenda

- Scope of Review
- Peer Review Methodology, Scope and Objectives
- Observations and Recommendations
- Questions and Discussion



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## Peer Review Methodology

The APTA Peer Review process is well established as a valuable resource to the public transit industry.

Highly experienced and respected transit professionals voluntarily provide their time and support to address the scope required.

The panel conducted this peer review from August 21- 26, 2022, through field observations and a series of briefings and interviews with Valley Metro staff and member city representatives.



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## Scope of Peer Review

The APTA Peer Review Panel was convened at the request of Valley Metro.

The peer review team focused on the Valley Metro bus and rail services and management of contracted operations.



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## Peer Review Objectives

- The technical and managerial expertise and capacity of the Operations Division to properly oversee and lead the agency's operations and maintenance functions, both contracted and internal.
- Operations Division collaboration with other Valley Metro divisions.
- Current policies, procedures, practices, and tools used for the agency's operations and maintenance functions, and for its contract services oversight.
- Current vendor contracts and recommend provisions to enhance performance, oversight, and accountability.



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# General Observations & Recommendations



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## General Observations & Recommendations

- The Valley Metro team is focused on providing quality transportation in the region and connecting communities and enhancing lives.
- Valley Metro will host the Super Bowl again.
- Valley Metro recently opened the Tempe streetcar and will open the Northwest Extension Phase II soon.
- Member cities articulated that Valley Metro has retained a CEO with extensive transit experience and a strong commitment to the customer experience.



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## General Observations & Recommendations

- Relationship with member cities is strained.
- Quality of bus and rail service is not meeting member city and community expectations.
- Tempe has expressed the intention to self-operate their bus service.
- Governor Ducey vetoed Proposition 400.
- The Valley Metro CEO is positioned to structurally align the agency to address the current environment.



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## Bus Observations & Recommendations:



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## Bus System

### Observations:

- Lack of effective contract management results in not meeting service needs and quality.
- Valley Metro bus operations staff lacks contract management experience.
- Mechanism to ensure contractor compliance (liquidated damages) not utilized.
- Lack of command of service needs and resources required.
- Lack of ownership and accountability of Valley Metro responsibilities.
- Lack of integrated approach to serving the customer.



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## Bus System

### Recommendations:

- Provide contract management training.
- Increase familiarity with FTA requirements.
- Utilize all available contract tools.
- Encourage staff to embrace Valley Metro mission to plan, build, operate and maintain a safe regional system.
- Ensure staff ownership of service reliability difficulties (workforce shortages, on-time performance, certifications).



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# Rail Observations and Recommendations:



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## Rail System

### Observations:

- Rolling stock and rail facilities visited were clean and well maintained.
- Presently, infrastructure appeared to be in a state of good repair.
- Rail maintenance facility expansion completed.
- Service operated directly by Valley Metro staff is acceptable.
- Comprehensive long-term maintenance strategy may require further planning documentation.
- Spare parts not available for two types of rail cars (Siemens S70, Brookville Liberty).
- Lack of effective contract management oversight of rail operations.



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## Rail System

### Recommendations:

- Provide contract management training.
- Increase familiarity with FTA requirements.
- Plan, develop and cost out a long-term maintenance plan.
- Encourage staff to embrace Valley Metro mission to plan, build, operate and maintain a safe regional system.
- Ensure staff ownership of service reliability difficulties (workforce shortages, on-time performance, certifications).



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## Safety & Security Culture Observations & Recommendations:



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## Safety & Security Culture

### Observations:

- Safety culture is disparate, not aligned and not contemporary.
- Safety briefings were not provided at any facilities visited.
- Safety sensitive practices not understood or observed.
- Rail operator certifications not up to date and lacked visibility after a highly publicized industry event.
- Safety warning signage lacking at the rail maintenance facility visited.
- Rail construction zones contained pedestrian hazards.
- Rail maintenance facility lacked adequate fencing.



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## Safety & Security Culture

### Recommendations:

- Reeducate staff on safety as a core value.
- Remind staff of safety sensitive practices by function and role.
- Provide additional safety oversight of contracted employees.
- Update threat and vulnerability assessments of rail maintenance facilities.
- Reexamine construction sites for hazards.



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# Observations & Recommendations

## Collaboration & Customer Focus:



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## Collaboration & Customer Focus

### Observations:

- True partnerships and data sharing with member cities lacking.
- Metro Valley, Accessible Transit Service collaborative behaviors of outreach, data sharing and the dash-board are best practices.
- Lack of understanding of the true customer.
- Lack of comprehension regarding service needs and resources required (i.e., missed trips).



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## Collaboration & Customer Focus

### Recommendations:

- Replicate the Accessible Transit Service collaborative behaviors of outreach, data sharing and the dash-board as best practices.
- Utilize all available contract tools to ensure that service is delivered equitably.



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## SOP Observations & Recommendations:



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## Operation's SOP

### Observation:

- Rail SOP Towing /Shoving Disabled Light Rail Vehicles and Streetcars, Removing a Train from Service, Tempe Streetcar Battery Issues, were not adhered to.

### Recommendation:

- SOPs should be reissued and discussed at toolbox briefings and daily safety meetings.



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## Other Observations & Recommendations:



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## Cyber Security

### Observation:

- The Transportation Security Administration has highlighted the need for cyber security for mass transit and passenger rail through security directives and information circulars.

### Recommendation:

- Perform an audit of the IT and OT systems for alignment to best practices (i.e., NIST cybersecurity framework) and to determine Valley Metro's cyber security hygiene and maturity.



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## Emergency Management

### Observation:

- The Public Agency Transit Agency Safety Plan required by the Federal Transit Administration highlights the need for emergency management plans, response and coordination with local, state and federal officials.

### Recommendation:

- Evaluate the need for Valley Metro personnel designated solely to emergency management responsibilities.



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**Thank You  
Questions?**



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