NFTA-METRO

Paratransit Study

Summary of Peer Practices
Technical Memorandum

August 2024

NELSON NYGAARD

TABLE OF CONTENTS

Appendix

July 2023 Memo on Peer Practices with Interview Questions

Table of Figures

1 INTRODUCTION

NFTA-Metro engaged a consultant team led by Nelson\Nygaard Consulting Associates, Inc. (consultant team or team) to undertake a Paratransit Comprehensive Analysis and Service Expansion Evaluation study. This technical memorandum describes the peer practices research effort undertaken as part of the study, including information about peer agencies' relevant paratransit practices, a summary of applicable national practices, and information about the paratransit programs of New York's upstate transit agencies.

This technical memorandum will be incorporated into the final report to be issued in the fall of 2024.

2 BACKGROUND

To learn how other transit agencies provide paratransit services and other demand-response transportation, the consultant team and NFTA identified five peer agencies. Selection of the peer agencies was based on shared characteristics and other factors such as service area population and size, paratransit ridership, service delivery model, and climate. Since NFTA is a member of the American Bus Benchmarking Group (ABBG), the team included two peers in the list, which included:

1. Centro Call-a-Bus in Syracuse, New York
2. Rochester Genesee Regional Transportation Authority (RGRTA) Regional Transit Service (RTS) Access in Rochester, New York (ABBG)
3. IndyGo Access in Indianapolis, Indiana
4. Milwaukee County Transit System (MCTS) Transit Plus in Milwaukee, Wisconsin ABBG)
5. Southwest Ohio RTA (SORTA) Access in Cincinnati, Ohio

A memorandum describing the selection process is included as an appendix to this technical memorandum.

Table 1 provides comparable information for each of these agencies alongside information for NFTA's PAL service in the following categories:

- Area characteristics
- Management structure
- Service area
- Hours
- Fixed-route base fare
- Eligibility
- Service statistics & performance
- Driver onboarding
- Driver retraining
- Fleet
- Software/IT

Table 1   Peer Comparison Table

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Characteristics						
Region	Buffalo	Syracuse	Rochester	Indianapolis	Milwaukee	Cincinnati
ABBG Member	Yes		Yes		Yes	
Population (2022)	809,275	641,357	693,960	969,466	943,240	744,901
Service Area (sq. mi.)	352	510	293	396	241	289
Management						
Service delivery	Direct	Oneida: fully in-house; Auburn and Oswego: vendor and in-house; Onondaga: 90% vendor	Direct	Contracted	Contracted	Direct
ADA management responsibilities	Distributed	Distributed	Consolidated unit within RGRTA	Contractor responsible for operations, maintenance, scheduling, dispatching, and Mobility Care Center	MCTS handles eligibility and complaints Contractor handles operations	Consolidated unit
Service Area						
Base service area	¾ mile, *including* express routes	¾ mile, excluding express routes	¾ mile, excluding express routes	¾ mile, excluding express routes	All of Milwaukee County, some areas in Waukesha and Ozaukee counties	¾ mile, excluding express routes
Premium/expanded area	N/A	N/A	3 additional zones	IndyGo Premium	N/A	N/A

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Service area map provided	No	Brochure	PDF	Web image	Google map	No
Hours						
Weekday base service hours	Follows fixed route (FR)	Follows FR	Follows FR. Interactive online map does not show variations.	Follows FR	Same days/hours as MCTS buses. Rides generally available from 4:30 am to 1 am	Follows FR
Weekday extra service hours	Express routes	N/A	▪ Base: 5 am–12 am ▪ On-demand and supplemental service: 5 am–10 pm	Premium service coincides with first am FR bus pullout and ends at 10 pm	N/A	N/A
Weekend hours	Follows FR	Follows FR	Follows FR	Follows FR	Follows FR	Follows FR
Fares						
Fixed-route base fare	$2	$1	$1	$1.75	$2	$2
Ride FR for free?	Yes	No	Yes	No	No	No
Fares	$4	$2	ADA $2; On-demand $4; Supplemental $8	ADA $3.50; Premium advance $7 or same day $10	$4	$4
Eligibility						
Delivery model	In-house	In-house	In-house	Contracted	In-house	In-house

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Verifying professional	PT/OT, clinical social worker, certified rehabilitation counselor, certified case manager, certified O&M specialist, qualified intellectual disability professional, physiatrist physical medicine and rehabilitation	Master's level social worker, RN, LPN, certified O&M specialist, PT/OT, certified medical assistant, degreed Medicaid service coordinator or case manager, certified rehabilitation counselor, NP, PA, psychologist, physician	MD/DO, NP, psychologist, PA, optometrist or ophthalmologist, licensed mental health professional, PT/OT, MDS nurse (skilled nursing facilities only), certified orientation & mobility specialist	Physician, Chiropractor, NP, RN, OT/PT, licensed social worker, psychologist, O&M specialist	Licensed healthcare provider	Vocational rehabilitation counselor, O&M instructor, licensed social worker, physician, senior program director, Pt/Ot, respiratory therapist, psychologist, mental health counselor, psychiatrist, other
Interviews	N	N	Y	Y	Y	Y
Functional assessments	N	N	Y	Y	Y	Y
Registered riders	4,560	4,000	2,800	4,420	5,800	2,500
Percent unconditional	66%	85%	"majority"	95%	"majority"	"majority"
Percent conditional	33%	15%	N/A	5%	N/A	N/A
Service Statistics & Performance						
Year (calendar per NTD)	2022	2022	2022	2022	2022	2022
ADA trips (unlinked)	201,299	140,559	131,238	149,143	182,271	168,045
Vehicle revenue hours	99,905	91,688	14,5586	84,665	162,333	76,271
Vehicle revenue miles	1,679,816	1,269,324	2,454,852	1,560,965	2,157,695	1,243,540
Productivity	2.01	1.58	1.97	1.76	2.04	2.20

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Annual operating costs	$10.9M	$8.3M	$10.0M	$14.5M	$8.22M	$9M
Cost per revenue hour	$109.10	$90.52	$68.69	$171.26	$50.64	$118.00
Cost per registered rider trip	$54.15	$59.05	$76.20	$97.22	$45.10	$53.56
Cost per revenue mile	$6.49	$6.54	$4.07	$9.29	$3.81	$7.24
Training						
Driver onboarding	Combined w/FR	Separate	Separate	Separate	Separate	Separate
Driver retraining	As needed	Mandatory, annual	Mandatory, 3-4 times a year	Monthly meetings		Monthly meetings
Fleet						
Fleet size (2022)	55	53	64	41	71	40
Fleet ownership	NFTA	Centro or vendor according to service delivery	RGRTA	IndyGo	Contractor	SORTA
Average miles before replacement	>150,000	125,000-150,000	under 150,000	150,000	Not available	over 200,000
Software/IT						
Scheduling software (ADA)	Trapeze PASS	Trapeze PASS	Trapeze PASS	Ecolane	Trapeze PASS	Trapeze PASS
Scheduling software (other)	N/A	N/A		N/A	N/A	N/A
Scheduling and dispatching software manager	IT liaison	Head of paratransit services	IT, paratransit delivery specialist	Ecolane support and IT	DSP	IT

FOCUS AREAS

Based on the results of the existing conditions analysis (separate report), the peer comparison includes the following focus areas:

- Structure and service delivery model
- Service area
- Training
- Technology
- Eligibility

Structure and Service Delivery Model

NFTA-Metro operates PAL service fully in-house. Interviewed peers showed a diverse range of organizational structures and delivery models, ranging from completely in-house service to completely contracted service. Rochester's RTS Access and Cincinnati's SORTA operate most similarly to NFTA-Metro as fully in-house services, but they are organized differently within their respective agencies. RTS Access predates the RGRTA, and, as such, operates independently from fixed-route service and every element of service is controlled internally. RGRTA handles IT, payroll, hiring, and human resources in an administrative capacity as the umbrella company under which RGTRA falls. SORTA's paratransit service SORTA Access is also its own operating division, reporting to the VP of Transit Operations who also oversees fixed-route service, safety and security, and customer care.

RTS Access recently reorganized to increase internal efficiency and cohesion. All peer agencies, both with in-house and contracted service, have a defined Director of Paratransit Services role to consolidate their paratransit operating divisions and communicate with their larger agencies.

Most agencies interviewed operate a fully internalized or contracted service, except Centro, which alternates between in-house and vendor service depending on the location of the service request. IT issues are typically handled internally regardless of contract status, although MCTS will outsource Trapeze license and troubleshooting to their contractor Transdev in their 2024 contract. MCTS also chooses to handle eligibility review in-house. Other services have previously worked with eligibility contractors (and IndyGo continues to do so), but agencies cite difficulties with outside influences shaping eligibility decisions when they are not managed internally.

Peers consistently mentioned the requirements of collective bargaining agreements as a key reason behind their unique service delivery models. SORTA offers the unique perspective of having shifted from a contractor-led operation to fully in-house service in 2019 due to

requests from fixed-route bus drivers. Centro Call-a-Bus can only dispatch in-house operators in Utica County because labor contracts prohibit vendor contracts in that county.

Expanded Service Areas

Of the five interviewed peers, three provide some service beyond the ¾-mile requirement. RTS Access, IndyGo, and MCTS each handle service beyond the minimum differently. These agencies' approach to an expanded service area – in addition to their pricing system, eligibility, and operations – could inform the expansion of NFTA-Metro's service area.

RTS Access

Following the contraction of the fixed-route system in 2021, RTS chose to continue serving roughly the same pre-2021 area despite the absence of fixed-route service in the area. Using vendor shuttles, RTS Access prices these extended areas differently. There are four zones – the two zones farthest from traditional fixed-route service are served by an on-demand contractor. Fares vary according to where trips start and end ($2 in the regular service area, $4 in the on-demand service area, and $8 in the supplemental service area).

To implement such a zoned system in the NFTA region, NFTA-Metro may need to reorganize its service delivery model.

IndyGo Access

IndyGo launched IndyGo Premium in 2023 to offer riders the option of traveling farther within the county by paying a higher fare ($7-$10 compared to $3.50). IndyGo Premium also offers same-day service, dependent on vehicle availability. IndyGo Premium also offers the possibility of same-day scheduling.

MCTS

MCTS Transit Plus operates throughout Milwaukee County and within some adjoining areas of Waukesha and Ozaukee counties. Offering service that exceeds the ADA minimum requires additional funding that may not be available in the future due to expected budget shortfalls.

Training

Driver training varies by agency. See Table 2. IndyGo offers short training periods of one week and RTS Access and Centro have significantly longer periods of six to eight weeks of combined classroom and behind-the-wheel training. All peers offer paratransit training separate from fixed-route training and impose strict requirements on paratransit drivers,

including refresher training sessions online or in the classroom. Refresher training touches on areas of frequent confusion or difficulty such as customer sensitivity, ADA requirements, and wheelchair and scooter securement. RTS and Centro have preliminary training protocols that focus on encouraging sensitivity and maintaining service. SORTA supplements their two weeks of initial training with monthly required training on different elements of paratransit service provision.

Table 2   Paratransit Vehicle Operator Training

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Separated from fixed route?	No	Yes	Yes	Yes	Yes	Yes
Length of training	7 weeks	6-8 weeks – combination of classroom and behind-the-wheel	6-8 weeks without CDL / 3-4 weeks with a CDL	1 week of classroom and behind-the-wheel	N/A	2 weeks of classroom and 2 weeks behind-the-wheel
Refresher trainings	As needed	Annual, mandatory	3-4 times a year, mandatory	Monthly	N/A	Monthly, mandatory

N/A – information not available

Technology and IT Support

Table 3 lists the scheduling software each agency uses as well as the level of IT coordination. All peers use Trapeze for trip scheduling and dispatch except IndyGo, which uses Ecolane. Each agency's IT department commonly houses all software management and support, though some paratransit teams bolster their service with a Trapeze specialist within the paratransit organization. For example, SORTA's IT staff includes a dedicated Trapeze program manager who can also serve as an end user. SORTA's IT team often functions more broadly to support all elements of transit service, so a dedicated Trapeze specialist ensures that complicated paratransit service and scheduling issues are addressed quickly and properly.

In a time of staffing shortages, agencies are choosing to train more employees on how to use the software rather than attempting to fill new positions with IT specialists.

Table 3   Scheduling Software and IT Coordination

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Scheduling Software	Trapeze PASS	Trapeze PASS	Trapeze PASS and a secondary software tool	Ecolane	Trapeze PASS	Trapeze PASS
Technology Manager	IT support	Head of Paratransit Services	IT, paratransit delivery specialist	Ecolane support and IndyGo IT	Transdev	Dedicated program manager for Trapeze

When tablet issues, technology mishaps, or software outages occur, peers similarly rely on paper manifests. Centro prints paper manifests each day for vendor operators who do not have the same level of technology installed in vehicles, but in instances of larger outages, they distribute manifests for all operators saved on a separate server.

Eligibility

NFTA-Metro's current eligibility process relies on an application form and professional verification from a qualified health professional. Table 4 lists the eligibility practices of each peer agency. Four of the five peers conduct functional assessments, of these, all except one agency uses in-house teams for the assessments, while one uses a vendor.

Table 4   Eligibility Applications and Program Management

Region ADA Service	Buffalo-Niagara PAL	Syracuse Centro Call-A-Bus	Rochester RTS Access	Indianapolis IndyGo Access	Milwaukee MCTS Transit Plus	Cincinnati SORTA Access
Application and verification process	▪ Form plus medical verification	▪ Form plus medical verification	▪ Form plus in-person interview and assessment	▪ Form plus in-person interview and assessment	▪ Form plus in-person interview and assessment	▪ Form plus in-person interview and assessment
Management	▪ Agency staff	▪ Agency staff	▪ Agency staff	▪ Contractor (for assessments)	▪ Agency staff	▪ Agency staff

3   NATIONAL PRACTICES

Based on the consultant team's experience conducting ADA compliance reviews, conducting research for the Transportation Research Board and U.S. DOT, and other consulting assignments reviewing paratransit operations, the following effective and innovative practices are included for reference.

CONSOLIDATED PARATRANSIT SERVICE AREAS

Many transit agencies establish paratransit service areas based on generalized fixed route operating hours. For example, it is common to have a weekday service area, a Saturday service area, and a Sunday service area, with all parts of each area served from the earliest time that fixed route operates to the latest time it operates on those days. In some cases, a late weeknight area is defined to reflect the fact that less fixed-route service is provided after a certain evening hour.

SCHEDULING PRACTICES

The following innovative practices in scheduling apply to methods used by system controllers who develop each day's paratransit schedule and for customer convenience.

Subscription Trip Assignments

Many transit agencies assign subscription trips to specific runs. This allows operators to become familiar with riders and locations, which can make for the most efficient delivery of service.

Customer Scheduling Tools

To promote customer self-reliance, many transit agencies offer different tools (IVR, website, and mobile application), each with the ability to track vehicles in real time, schedule trips, and manage their accounts functions. Transit agencies also provide training to employees and riders on how to use these tools with the goal of increasing customer adoption.

Templating Subscription Trips

Many transit agencies template subscription trips. Schedulers aim to make subscription trips as efficient as possible and schedule other demand trips around them. Schedulers also

consider general ridership patterns when creating subscription templates. Agencies approve trips that match general patterns of demand, or which can be efficiently grouped for subscription service. Agencies allow requested subscription trips that go against the grain of typical travel or are singular and cannot be efficiently grouped to float and to be batch scheduled with other demand trips.

Subscription Trip Time Negotiations

Many agencies negotiate trip times with riders before granting subscription status and some even renegotiate times as needed to maintain maximum grouping and efficiency.

Long Trips

Many transit agencies schedule long trips as they are requested so subsequent trips can be grouped with long trips.

Workload Allocation

Most transit agencies limit the number of trips each scheduler can handle to between 500 and 800 trips.

USE OF DROP-OFF SETTINGS

Most transit agencies include a drop-off software setting of 30 minutes early to zero minutes late to ensure customers arrive close to but not after their appointment times.

VEHICLE ASSIGNMENT SOFTWARE

Many transit agencies use software to manage vehicle assignments. These tools can display where vehicles are parked, which are assigned to runs, and which are available or out of service.

ELIGIBILITY PRACTICES

The ADA requires the paratransit eligibility determination process to strictly limit eligibility to people who meet the criteria. This requirement is intended to prevent transit agencies from conferring ADA paratransit rights on large sections of the public, due to the cost implications and the inevitable decline in the quality of service that such a transit system would provide its eligible riders. However, strictly limiting eligibility to people who meet the ADA criteria

must be paired with innovative practices in ADA paratransit eligibility. The following are practices that align with the DOT ADA regulations for paratransit eligibility.

Most Limiting Condition

To ensure customers may travel under different conditions, it is an effective practice to consider the applicant's travel throughout the entire transit system service area during all seasons, not just near the home or workplace in optimal weather. An applicant's eligibility should be based on their most limiting conditions. Secondary conditions such as disorientation, fatigue, and difficulties with balance, as well as variable conditions such as multiple sclerosis should be considered but not be used as the basis for ADA eligibility.

Comprehensive Skills List

To correctly assess eligibility, transit agencies must consider, the individual's functional ability, the accessibility of the transit system, (stations, stops), the impact of architectural barriers (streets, intersections), lack of sidewalks and poor sidewalks, lack of curb ramps and poor curb ramps, specific local environmental conditions, such as the climate. Many transit agencies use a comprehensive skills list to determine these abilities.

In-Person Interviews/Functional Assessments

Many transit systems now require in-person interviews or functional assessments to more accurately determine whether a disability prevents the applicant from using the fixed route system. The functional assessment usually involves observation of an applicant attempting to perform functional tasks that simulate a fixed route trip, such as climbing steps, crossing a street, walking, and taking cognitive tests. Some disabilities, such as seizure disorders and psychiatric disabilities, cannot be evaluated by functional assessments. Appropriate professionals (physical therapists, occupational therapists, orientation and mobility specialists, or professionals with similar qualifications) should perform functional assessments.

Recertification Every Five Years

The FTA requires recertification of eligibility at reasonable intervals, typically between three to five years. Many transit agencies that have developed thorough ADA paratransit eligibility determination processes offer long-term (five year) eligibility to unconditionally eligible riders whose functional ability is not expected to change over time. A longer eligibility period eliminates unnecessary inconvenience for riders and lowers the cost of eligibility

determination. In addition, agencies proactively notify customers of the need to recertify in advance of their expiration date.

4   UPSTATE NY AGENCIES

During the December 2023 public engagement sessions, some participants asked about how other transit agencies in New York compare with NFTA PAL. Following discussions with NFTA staff, the team narrowed the list if of comparable agencies to those in Upstate New York because transit services in the New York City region are vastly different.[1] Accordingly, NFTA's Upstate peers are Centro (Syracuse), RTS (Rochester), and the Capital District Transportation Authority (CDTA). The team had previously interviewed Centro and RTS about their paratransit service and subsequently obtained data on CDTA's STAR service. Table 5 presents comparable statistics for each of the four agencies.

Table 5   Paratransit Statistics for Upstate NY Transit Agencies

Agency ADA Service	NFTA-Metro PAL	Centro Centro Call-A-Bus	RTS RTS Access	CDTA STAR
Population (2022)	809,275	641,357	693,960	511,949
Service Area (sq. mi.)	336	510	298	207
Base service area	¾ mile, *including* express routes	¾ mile, excluding express routes	¾ mile, excluding express routes	¾ mile, excluding express routes
Premium/expanded area	Express routes during weekday commute periods	None	3 additional zones, including on-demand and supplemental zones*	None. Offer microtransit service (Flex) in other zones.
Fixed-route base fare	$2	$1	$1	$1.50
Ride FR for free?	Yes	No	Yes	Half fare
Fares	$4	$2	ADA $2; On-demand $4; Supplemental $8	$2.50
Use of supplemental providers	No	Yes	No	Yes

---

[1] Tompkins Consolidated Area Transit (Ithaca region), and Broome County Transit (Binghamton) are very small operations and are not considered NFTA peers.

Agency ADA Service	NFTA-Metro PAL	Centro Centro Call-A-Bus	RTS RTS Access	CDTA STAR
Year (calendar per NTD)	2022	2022	2022	2022
ADA trips (unlinked)	201,299	144,761	287,354	288,401
Vehicle revenue hours	99,905	91,688	145,586	154,604
Vehicle revenue miles	1,679,816	1,269,324	2,454,852	2,810,251
Productivity	2.01	1.58	1.97	1.83
Annual operating costs	$10.0M	$8.6M	$19.1M	$22.4M
Cost per revenue hour	$100.18	$93.57	$131.32	$144.89
Cost per registered rider trip	$49.72	$59.26	$66.53	$77.67
Cost per revenue mile	$5.96	$6.76	$7.79	$7.97

* See RTS Access discussion

ADDITIONAL TAKEAWAYS

The following are additional takeaways for paratransit in Syracuse, Rochester, and Albany regions compared with the Buffalo-Niagara region.

- NFTA is the only agency providing PAL service within its express bus corridors.
- Centro and CDTA use supplemental paratransit service providers in addition to their own employee drivers.
- Both RGRTA and CDTA operate microtransit services and use vendors for these programs.
- Like NFTA, CDTA serves certain destinations that are far from the core service area, contributing to some inefficient runs when serving trips.

Memorandum

To: Sam Gallivan, NFTA

From: Bill Schwartz

Date: July 11, 2023

Subject: Peer Practices Review – Proposed Approach – Revised

Task 1.4 (Peer Practices Review) is designed to research and document applicable and transferable practices from five peer agencies that NFTA can consider for PAL service. The overall approach is to collectively identify up to five agencies, including some that provide demand-response services in addition to what is required under ADA and/or are working with vendors or other agencies to deliver additional services. This memorandum includes a series of topics and associated questions as well as a list of candidate agencies.

Areas of Focus

While we aim to ask a range of questions and to compile data, we want to obtain information on how peer agencies compare with NFTA-Metro in certain key areas to inform study recommendations. Focus areas include:

- **Vehicles**: funding, procurement policies, and maintenance programs in place to meet fleet requirements
- **Workforce:** employee recruitment and onboarding; retention strategies, including innovative run structuring
- **Training**: approach and curriculum; use of refresher training
- **Organization and Service Model**: how the agency's paratransit program is structured, whether and how any vendors are used
- **Service Area:** How peers that go beyond minimum ADA requirements fund and deliver service

These topics and other questions we plan to ask are described later in this memo.

Recommended Peer Agencies

We are recommending researching and interviewing agencies about the following five paratransit programs:

- RTS Access in Rochester
- Call-A-Bus in Syracuse
- Transit Plus in Milwaukee, WI
- Access in Cincinnati, OH
- IndyGo Access/Open Door in Indianapolis, IN

The table below compares NFTA-Metro PAL to each provider's service area population and size and includes NTD data for FFY 2019 (pre-COVID) and FFY 2021 (latest available year). ABBG membership is also noted.

Service Data for PAL and Recommended Peer Agencies

Agency/Service Name	Operation	Service Area Population	Service Area Size (sq mi)	NTD 2019 Annual Ridership	NTD 2021 Annual Ridership
NFTA-Metro: PAL (ABBG Member)		865,000	352	214,499	113,603
Rochester-Genesee Regional Transportation Authority: RTS Access (ABBG Member)	In-house	694,000	293	222,658	121,505
Central New York Regional Transportation Authority (Syracuse): Call-A-Bus	In-house?	641,000	510	186,041	110,229
Milwaukee County Transit System: Transit Plus (ABBG member)	Two contractors	943,000	241	451,109	269,581
Southwestern Ohio Regional Transit Authority (Cincinnati) Access	In-house	745,000	289	226,685	130,356
Indianapolis and Marion County Public Transportation: IndyGo Access/ Open Door	Contracted	928,000	396	282,281	169,338

Milwaukee, Rochester (suggested by you), and IndyGo offer service beyond the minimum. We believe having Syracuse as another New York agency makes sense since the study is state funded. While the Syracuse service area is larger, the ridership is close to Rochester's. SORTA in Cincinnati has similar annual ridership and population to NFTA-Metro. In addition, team member Andy Stelter recently worked there.

The recommended topic areas and general questions that the study team intends to ask the transit agencies are listed below.

Data Compilation and Interview Topics

Our team has begun developing tables of service data and other information from NTD, agency websites, studies, etc. We are also downloading relevant materials. The topics and questions below are presented with NFTA-Metro and PAL in mind. Depending on the agency, we expect to use a combination of a questionnaire emailed in advance and virtual interviews to obtain information, tailored accordingly.

Organization/Service Description

6. Which of the following describes your paratransit service's operating structure?
    i. In-house operation
    ii. Single turnkey contractor
    iii. Multiple turnkey operators (by zone)
    iv. Contracted call center with separate contracted service providers
    v. In-house call center with contracted service providers
    vi. Contracted broker with subcontracted service providers
    vii. Other (describe)

7. If available, provide the number of operators, reservationists, schedulers, and dispatchers authorized and on staff. Provide a recent organization chart if available.

8. Do you provide demand-response services in addition to complementary paratransit (ADA)? [If known, ask for description of service]

9. Do you use contractors for any part of the paratransit service? [If yes, complete table for eligibility, reservations, scheduling and dispatching, operators, etc.]

10. If you use outside contractors and service providers, describe your working relationship with each, including overflow demand (e.g., taxis, etc.). What percentage of service does each provide?

11. Do you set paratransit hours of operation at the corridor lever or more generally (e.g., weekdays, weekday evenings, Saturdays, Sundays)? How does this align with fixed-route service?

12. Do you provide any other services or amenities to ADA paratransit customers that exceed ADA requirements?
    i. Service beyond the minimum ¾ mile corridors
    ii. Service beyond the minimum required days and hours
    iii. Same-day service

      iv. Service to people other than those who are ADA paratransit eligible (e.g., seniors)

      v. Other (describe)

13. Do you also provide any taxi or TNC subsidy programs as an alternative service for ADA paratransit customers?

14. Does your agency have a disaster response or emergency readiness plan specifically for paratransit service?

Funding

1. What are your annual operating expenses for your complementary paratransit service?

2. If service extends beyond ADA requirements, do you track costs separately? (Provide if available)

3. Do you currently receive (or have applied to receive) funding from any other sources?

      i. Human resources

      ii. Medicaid

      iii. Workshop trip providers/programs

      iv. Other (please describe)

4. Do you believe the funding you receive is adequate to operate the service? If not, please explain.

Eligibility

We can already assess the eligibility determination elements used from each service's application forms.

5. Roughly what percentage of applicants receive conditional v. unconditional eligibility?

    a. Which conditions does your agency impose?

    b. Do you apply trip conditions during the reservations process?

Riders and Ridership

6. From NTD, we have xxx,xxx annual trips for FY21. What is your current ridership (most recent year)? Vehicle/Revenue hours and miles?

    a. How has ridership changed since the pandemic?

    b. Approximately how many eligible riders are currently registered?

7. If you serve other populations (older adults, NEMT, others), what percentage of riders does each non-ADA group compose?

    a. Are non-ADA trips co-mingled with ADA trips?

Reservations, Scheduling, and Dispatching

We are interested in learning more about how you handle reservations, scheduling, and dispatching. Please provide an overview and if known, answer the following:

8. How do schedulers divide work? How many schedulers do you employ and how are they assigned?

9. How do you schedule and manage subscription/recurring/workshop trips?

    a. What percentage of your service is comprised by these workshop/subscription trips?

    b. How and when are subscription trips typically scheduled?

10. Who fields ETA calls, and how does that impact other elements of service? Do agents who answer ETA calls have access to full dispatching information?

11. How do dispatchers divide runs? What is the ratio of dispatchers to vehicles in service during peak periods and off-peak periods?

Technology

12. Which software do you use to schedule, manage, and operate the service?

13. Which department manages or takes ownership of technology?

14. Does your agency have policies or guidelines on how new technology initiatives are selected and implemented?

15. Does your department/organization have the capabilities (people, skillsets) needed to optimize your existing tools and systems?

16. What contingency plans does your agency have in case of malfunctioning technology?

17. Who is charged with installing technology/equipment in vehicles? Who maintains this equipment?

Vehicles

18. Describe the makeup of your fleet and the accessibility of vehicles within your fleet. [Use table]

19. Do you have enough vehicles to meet current demand (ideally without double-shifting)? What is your daily spare ratio?
20. How often are vehicles typically retired and replaced?
    a. What dictates this schedule?
    b. Does this process work well?
    c. Is there anything you'd like to see improved?
21. Does your agency have current plans to electrify paratransit vehicles?
    a. Where do you stand in that process?

Performance

1. What is your current on-time performance for pickups? Drop-offs?
2. What policies are in place to enforce or incentivize (pick-up and/or drop-off) on-time performance?
3. Do you believe your performance indicators accurately reflect the level and quality of service provided?

Workforce and Training

1. How do you recruit new operators?
2. Have you made any changes to improve operator retention?
3. How are operators trained?
    a. Does this differ from fixed route operator training?
4. Is refresher training required?