



MetroAccess Ad Hoc Committee Final Report Executive Summary

Purpose of Presentation

- Report to Board on Ad Hoc Committee's review and findings regarding MetroAccess
- Acknowledge Committee's efforts and achievements
- Seek Board approval for policy and procedural changes
- Seek Board approval to initiate and award a consultant contract for financial analysis of cost-bearing recommendations

Background

On February 16, 2006, the WMATA Board of Directors created an Ad Hoc Committee to examine MetroAccess (MACS) paratransit service and tasked the committee with making recommendations for the improvement of the service. The committee, comprised of a cross-section of riders, Board members, transit professionals, human service agencies, and advocates for people with disabilities, has concluded its work and has produced a final report with recommendations for the Board's review and consideration. Attached is the Best Practice Working Group Report which includes the 11 specific recommendations made to the MetroAccess Ad Hoc Advisory Committee.

Staff has taken the recommendations and broken them into two categories: Cost Neutral Service Changes and Actions beginning Cost Analysis.

Cost-Neutral Service Changes

The Ad Hoc Committee has recommended a number of procedural and policy changes that can be made with no financial impact to the Authority. Staff has reviewed all of these changes and agrees with the recommendation. In order to implement these changes certain policies and practices need to be changes. Those changes include:

- 1. WMATA should improve customer service and communication immediately (Committee Recommendation #1) (Within 2 months)**
 - a. Development of mission statement and messaging
 - b. Beta testing of forthcoming web-based technologies
 - c. Use of call recorder apparatus for quality monitoring (this apparatus is now installed and staff are being trained in its use presently)
 - d. Operations staff available during all hours of operation (ensure that this is communicated to all customers in various forms)
 - e. Involvement of customers in development of new policies through Interim Advisory Group (combined E&D and RAC resources), as well as through public hearings, web, and media broadcast to the public
 - f. Expanded use and wide distribution of all MetroAccess literature in accessible formats (included in CCMS communications plan for MACS and facilitated by ADAP)
 - g. Provide sensitivity training for MACS drivers and dispatchers
- 2. WMATA and MV Transportation should further utilize scheduling and software strategies immediately (Recommendation #2) (Within 2 months)**
 - a. Reduce 14-day advance reservations to 7 days
 - b. Explore scheduling by zone where possible (analysis now beginning)
 - c. Assign certain types of trip scheduling to individual schedulers for training and improved efficiency in future scheduling
- 3. WMATA should adopt a user-friendly late cancellation policy and monitor no-shows carefully within 6 months (Recommendation #6) (3 to 6 months)**
 - a. Late cancellation not implemented until less than 2 hours prior to scheduled trip
 - b. First no-show forgiven with courtesy notice

- c. Chronic no-shows on subscription service are specifically reviewed
 - d. Emphasize that a late cancellation is always preferable to a no-show
 - e. Specify guidelines on what constitutes a no-show
 - f. Positively reinforce absence of no-shows and/or late cancellations with some type of reward system
4. **WMATA should develop a safety policy and a passenger assistance policy to clarify what users can expect from the service in terms of additional assistance beyond the curb or the door. (Recommendation #8) (3 to 6 months)**
 5. **WMATA should clarify the relationship between human service transportation and ADA paratransit with regional and local partners within one year (Recommendation #9) (6 months or longer)**
 - a. Host a regional forum
 - b. Meet with Maryland Transportation Secretary Flanagan and human services agencies on coordination funding
 - c. Enhance WMATA (ADAP) travel training program
 - d. Work with agencies directly on coordination (i.e., pilot program that will begin with ARC in Prince George's County)
 - e. Work with agencies to enhance MACS driver sensitivity to needs of people with disabilities
 6. **The WMATA Board of Directors should host a Disability Awareness Event within one year (Recommendation #11) (6 months or longer)**
 Staff has reviewed all of these changes and agrees with the recommendation. In order to implement these changes certain policies and practices need to be changed.

ACTIONS REQUIRING COST ANALYSIS

The remaining recommendations from the Ad Hoc Committee's final report carry cost implications and will require further analysis. Again, staff has reviewed all of these changes and agrees with the recommendation. These recommendations include:

1. **WMATA should implement a door-to-door policy within 6 months (Recommendation #7) (3 to 6 months)**
 - a. Reduce wait time in No-Show policy to 5 minutes concurrent with implementation of door-to-door service
 - b. Provide sufficient driver training as appropriate
 - c. Provide sufficient dispatcher training as appropriate
2. **WMATA should use internal resources and hire an experienced paratransit consultant to evaluate the cost impacts of recommendations from the Best Practices Working Group, particularly door-to-door service, and examine any proposed MV Transportation cost increases. Results should be provided within 2 months. (Recommendation #3) (Within 2 months)**
3. **WMATA should ensure that MV Transportation has adequate, experienced and stable staffing within 3 months (Recommendation #4) (3 to 6 months)**
 - a. Increase staffing levels in scheduling and dispatch functions (note that Critical Trip Team supports dispatch and customer service functions)
 - b. Driver compensation package (could include SmartBenefits, for example)
 - c. Review staffing levels and turnover periodically (currently being done)
 - d. Enhance employee training, and cross-train
4. **WMATA should strengthen contract oversight and monitoring within 3 months (Recommendation #5) (3 to 6 months)**
 - a. Increase MACS staff in audit, quality monitoring, customer service, and complaint resolution/response (staffing recommendations being reviewed—some augments may still be needed)
 - b. Revisit MACS fleet spare ratio and develop CIP for MACS and ensure adequate fleet size

for peak vehicle requirement

5. WMATA should examine the potential for a premium same-day service for MetroAccess customers in one year (Recommendation #10) (6 months or longer)

In order to fully understand the cost implication of these recommendations, staff recommends that we bring in an outside cost consultant to work with us, the local service providers and the interested community to develop a detailed cost analysis of the impact of these recommendations. The cost impact will be done in time to review with the interested community an the local jurisdictions in time to include a staff recommendation in the FY08 budget proposal.

Recommended Actions

WMATA fully endorses the recommendations of the MetroAccess Ad Hoc Committee and will take the following actions:

- A. Amend MetroAccess Late Cancellation and No-Show Policy to enable customers to cancel their trips without penalty up to two hours prior to the beginning of the scheduled pick-up window.
- B. Amend MetroAccess ADA Paratransit Plan so that customers can reserve MetroAccess trips up to seven days in advance of travel instead of fourteen days.
- C. Adopt the other cost-neutral recommendations as outlined in the committee's final report.
- D. Initiate and award a consultant contract, not to exceed \$50,000, for the financial analysis of the cost-bearing recommendations included in the committee's final report.

Attached: MetroAccess Ad Hoc Advisory Committee Final Report and Recommendations

Best Practices Working Group Report

DRAFT as of 06/01/06

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**Appendix B: Specific Operational Recommendations for
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Appendix C: Interim Report from Ad-Hoc Committee

Appendix D: List of Acronyms



Alternative formats of this document can be made available for persons with disabilities. Phone: 202.962.3321 or 202.962.3213 (TDD) Email: wklancher@mwkog.org. Allow 7 working days for preparation of the material.

Introduction

On February, 16, 2006 the Washington Metropolitan Area Transit Authority (WMATA) Board of Directors created an ad hoc committee to review WMATA's MetroAccess (MACS) paratransit service. The Board tasked the committee with recommending improvements for MetroAccess service because of difficulties experienced by customers with the transition to a new service provider.

The ad hoc committee's work was guided by the recommendations for improving MetroAccess service in the study "Improving Demand Responsive Services for People with Disabilities in the Washington Region" dated February 15, 2006 and conducted by the Transportation Planning Board (TPB). The study identified shortcomings in existing paratransit services and made recommendations based on innovative practices from around the country.

The ad hoc committee agreed to a general scope of work to review existing WMATA MetroAccess services to develop recommendations for improving service. The committee's scope includes:

- 1) Providing a venue for MetroAccess riders to give input into ways to improve service and incorporate rider recommendations
- 2) Reviewing "Best Practices" for paratransit service and identification of best practices for WMATA to implement
- 3) Developing a program for improving MetroAccess service and responding to recommendations made by the TPB Access For All (AFA) advisory Committee study "Improving Demand Responsive Services for People with Disabilities in the Washington Region"

Pursuant to the ad hoc advisory committee scope, the committee established a team paratransit industry experts and MetroAccess users to complete a review of "best practices" in paratransit services and to address issues raised in the AFA report. The Best Practices sub-committee is chaired by Wendy Klancher, from the Metropolitan Washington Council of Governments. Members of the sub-committee include:

- Dan Dalton, Easter Seals Project ACTION
- Jachebed Jordan, IONA Senior Services
- John Smolenski, MTA Deputy Administrator
- Harold Snider, Montgomery County Commission for People with Disabilities
- Penny Reeder, MetroAccess rider
- Mary Williams, Riders' Advisory Council
- Steve Yaffe, Fastran- Fairfax County
- Carolyn Bellamy, MetroAccess rider
- Elizabeth (Buffy) Ellis, KFH Group
- Christian T. Kent, Director of MetroAccess Services
- Jon Monson, MV Transportation.

The scope of the Best Practices working group included examining industry best practices and policies in paratransit service pertaining to:

- Reservations, scheduling, dispatch and driver/vehicle operations
- Door-to-door v. curbside service
- No shows and late cancellation policy
- Same day service
- Human service transportation coordination

The Best Practices working group met a total of X times from March XX, 2006 through May 15, 2006. Meetings were held on March XX, March 31, April 7, April 17, April 28, May 5 and May 15. Despite the rigorous meeting schedule, all meetings of the Best Practices working group were well attended and each meeting had lively discussion and full participation from all members.

The group utilized a number of facilitation discussion techniques—including group brainstorming sessions and a prioritization exercise for rating recommendations—during meetings to guide the discussions and deliberations. Despite a wide variety of backgrounds among the group members and an abundance of differing view points, group members talked openly throughout the process, and developed solid support for each of the 11 recommendations.

Resources Used to Develop Recommendations

Peer agency surveys, web based information, phone interviews and email were utilized to develop the attached peer review document (Appendix A) outlining the policies and practices of various U.S. transit provider paratransit programs.

The Best Practices Working Group developed comparative information regarding the paratransit services of 14 peer transit agencies, including:

- Maryland Transit Administration (MTA)
- Port Authority Transit, Pittsburgh (PAT)
- Tri-County Metropolitan Transportation District, Portland Oregon (TriMet)
- Metropolitan Transportation Authority, New York (MTA)
- Utah Transit Authority (UTA)
- Chicago Transit Authority (CTA)
- Massachusetts Bay Transportation Authority (MBTA)
- Regional Transit District of Denver (RTD)
- Bay Area Regional Transit, San Francisco (BART)
- King County Metro, Seattle (KC Metro)
- Southeastern Pennsylvania Transit Authority, Philadelphia (SEPTA)
- Transit Authority of River City, Louisville Kentucky (TARC)
- Metropolitan Transit Authority of Harris County, Houston Texas (Metro Houston)
- New Jersey Transit (NJ Transit)

The working group also utilized several expert reports on the issues facing paratransit services including: the Easter Seals Project ACTION brochure on “*Innovative Practices in Paratransit Service*”; the Federal Transit Administration (FTA) Transit Cooperative Research Program (TCRP) survey and report “*Practices in No-Show and Late Cancellation Policies in ADA Paratransit*”; and the National Council on Disability report “*The Current State of Transportation for People with Disabilities in the United States*”.

Furthermore, the “*Improving Demand Responsive Services for People with Disabilities in the Washington Region*” report of February 15, 2006 conducted by the Transportation Planning Board (TPB) informed and guided the scope and deliberations of the Best Practices Working Group.

The team also utilized and relied upon the expertise of Russell Thatcher and Rosemary Mathias of TranSystems, Inc. Russell Thatcher served as the consultant for the TPB Demand Responsive Study.

Finally, the expertise and knowledge of the individual members of the Best Practices Working Group was utilized to develop the recommendations contained within this final report. From the first-hand experiences of the MetroAccess users to the expertise of the paratransit professionals, the Best Practices Working Group recommendations were shaped by the expertise, experiences and ideas of the members of the working group.

Recommendations

The following 11 recommendations from the Best Practices Working Group of the MetroAccess Ad-Hoc Advisory Committee are the culmination of the working groups meetings, discussions, deliberations, research and prioritization efforts. All policy recommendations are noted by italics. Recommendations that have cost implications for WMATA, including recommendations 3, 4, 5 and 7, were discussed at the final meeting Ad Hoc Committee on May 24.

The final set of recommendations from the Best Practices Working Group were broken down by recommended implementation time frame—short-term, mid-term and long-term—and are accompanied by the Best Practices Working Groups agreed upon top three priorities from the full list of recommendations.

Short-Term (Within 2 months)

1. WMATA should improve customer service and communication immediately

A. The MetroAccess program needs a “Customer-First” focus.

- A “Customer-First” focus should be specified in a mission statement, adapted in management strategies, and embedded in personnel training and staff meetings
- Sensitivity training should be provided to reservationists, dispatchers and drivers to provide a better understanding of various mobility needs as well as the psyche of customers with disabilities

- Supervisors should use the telephone system to randomly monitor reservationists' and dispatchers' Customer First focus
- B. WMATA should fully test advance technology (i.e. web-based reservations) and train employees and users on the technology before implementation. Until thorough testing and training is complete and the MetroAccess system is running smoother, advanced technology should not be "rolled out". Pre-testing advanced technology with consumers is an important prerequisite.
 - C. WMATA should ensure stranded passengers calling after normal business hours have the option to quickly contact an employee for help and that consumers understand the availability of this option. (The "Where's My Ride" line now has a recorded message telling customers that someone is available to assist people after normal business hours).
 - D. WMATA should clearly communicate to customers MetroAccess policies and allow customers to comment on proposed new policies
 - E. WMATA should distribute MetroAccess materials widely in accessible formats. The MetroAccess users guide should be distributed to visually-impaired MetroAccess customers in the accessible format of their choice (electronic, large print or Braille) by June 30, 2006. In addition, these media should be distributed via newspapers, and accessible newspaper reading services, such as the Metropolitan Washington Ear Radio-Reading, and Dial-In newspaper reading service, as well as the National Federation of the Blind's NewsLine dial-in newspaper services

2. WMATA and MV Transportation should further utilize scheduling and software strategies immediately

- A. *WMATA should reduce 14-day advanced reservation window to 7 days.* This policy change may benefit MetroAccess by decreasing the number of cancellations, including late cancellations and no-shows.
- B. MV Transportation should take greater steps to keep vehicles and drivers in familiar geographic areas.
- C. MV Transportation should assign standing order (template) manifests by area to individual schedulers to encourage familiarity with the street network and empower them to oversee the efficiency and effectiveness of these routes.

3. WMATA should use internal resources and hire an experienced paratransit consultant to evaluate the cost impacts of recommendations from the Best Practices Working Group, particularly door-to-door service, and examine any proposed MV Transportation cost increases. Results should be provided within 2 months.

Mid-Term (3 to 6 months)

4. WMATA should ensure that MV Transportation has adequate, experienced and stable staffing within 3 months

- A. WMATA should ensure that MV provides adequate staffing for the scheduling and dispatch functions to ensure effective service, which may require MV to increase its staffing levels.
 - Each MV scheduler manages between 70 and 125 runs. A run is defined as a list of trips for a driver and a vehicle, and includes a pull-out and pull-in time. The paratransit best practice should have schedulers managing about 40-50 runs, if runs have 15 to 20 trips on average. This “best practice” range varies based on the number of subscription trips and the type of scheduling software program used.
 - Each MV radio dispatcher manages approximately 90 weekday runs. The paratransit best practice indicates that each radio dispatcher should manage no more than 30 runs each. If all the mobile data terminals (MDT’s) are functioning properly on all vehicles, a dispatcher could reasonably manage around 35 to 50 runs each.
- B. WMATA should ensure that MV Transportation pay and benefits attract experienced and stable workforce
- C. WMATA should periodically review staffing levels and turn-over rates for MV Transportation and sub-contractor employees to ensure adequate and stable staffing levels.
- D. MV Transportation should enhance employee training.
 - MV should hold periodic refresher sessions to exchange “best tips”, allow schedulers, dispatchers, reservationists and drivers to exchange perspectives, and discuss disability sensitivity issues.

5. WMATA should strengthen contract oversight and monitoring within 3 months

- A. WMATA should increase the number of staff in the Office of MetroAccess to allow for:
 - Performance data verification;
 - Service quality monitoring;
 - Customer service; and
 - Complaint resolution and response.
- B. WMATA should ensure adequate MetroAccess vehicle availability by increasing the spare fleet ratio to the contract requirement of 12%.
 - The current MetroAccess spare fleet ratio is 10%. The industry best practice and FTA guideline for a spare fleet ratio is 20%.
 - WMATA should also begin work on a more thorough Capital Plan to manage vehicle and equipment purchases and maintenance and identify the required spare ratio as the fleet ages.

6. WMATA should adopt a user-friendly late cancellation policy and monitor no-shows carefully within 6 months

- A. Revise the current late cancellation policy to allow customers to cancel up to two hours prior to scheduled trip
- B. The first no-show is automatically forgiven, but the customer is automatically sent a written copy of the no-show policy
- C. Review chronic no-show subscription customers for needed changes
- D. Emphasize to customers that a late cancellation is preferable than being a no show for the trip
- E. Set fair and consistent guidelines for what constitutes an acceptable no-show
- F. Explore the possibility of a “rider reward” program

7. *WMATA should implement a door-to-door policy within 6 months*

- A. Enact a door-to-door policy, but reduce the required driver wait time from 10 to 5 minutes
- B. Train drivers on appropriate door-to-door assistance for passengers with disabilities
- C. Train dispatchers on added service dimensions required with door-to-door

8. *WMATA should develop a safety policy and a passenger assistance policy to clarify what users can expect from the service in terms of additional assistance beyond the curb or the door.*

- The policy would help clarify to MetroAccess customers and organizations serving persons with disabilities, including client centers for persons with developmental disabilities what is reasonable to expect from MetroAccess service. This item is related to recommendation 9 below.

Long-Term (6 months and longer)

9. *WMATA should clarify the relationship between human service transportation and ADA paratransit with regional and local partners within one year*

- A. Working with the National Capital Region Transportation Planning Board, WMATA should host a regional forum to bring stakeholders together to discuss potential partnerships to best serve MetroAccess customers with developmental disabilities in Montgomery and Prince George’s county
- B. WMATA should meet with the Maryland Secretary of Transportation and human service agencies to discuss how state and federal funding for public transit and human service transportation can be used to more effectively and efficiently serve consumers
- C. WMATA should work with local transit and human service agencies to increase travel training on the fixed route system within 6 to 9 months.

- D. WMATA should work with local transit and human service agencies to provide more efficient specialized transportation services that could reduce demand for MetroAccess paratransit.
- E. WMATA should work with local transit agencies to sensitize all bus drivers to the needs of seniors and passengers with disabilities, as part of the Customer First focus.

10. WMATA should examine the potential for a premium same-day service for MetroAccess customers in one year

- A premium same-day service for MetroAccess customers should be considered with the appropriate limits on the program. A user fare between \$5.00 and \$10.00 is suggested. The program should be limited in terms of maximum total cab fare allowed and/or total trip distance and perhaps even the number of same-day trips a MetroAccess user can take.
- As part of consideration of a premium same-day service, WMATA should work in conjunction with the local jurisdictions to ensure that each of the compact jurisdictions has accessible cab availability

11. The WMATA Board of Directors should host a Disability Awareness Event within one year

- Recognizing that awareness and attitudes greatly impact key decisions about transportation for persons with disabilities, the WMATA Board members should be offered the opportunity to participate in an awareness event where they would travel with people with disabilities on Metrobus, Metrorail and MetroAccess, similar to the TPB Access for All Disability Awareness Day. The Riders Advisory Council and the Interim Users Advisory Group should be involved in organizing the event.

Priority Recommendations

At the final Best Practices Working Group Meeting on May 15 each participant provided their top three priority recommendations. Some of these recommendations are policy issues, and they are referenced in italics. The following recommendations are the top priorities for MetroAccess as determined by the Working Group members:

- *WMATA should implement a door-to-door policy (Recommendation #7);*
- WMATA should improve customer service and communication (Recommendation #1); and

WMATA should require MV to increase staffing levels for scheduling and dispatch functions (Recommendation #4 A).

SUBJECT: MetroAccess Ad Hoc Advisory Committee and Best Practices Working Group Report and Recommendations

PROPOSED
RESOLUTION
OF THE
BOARD OF DIRECTORS
OF THE
WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY

WHEREAS, The WMATA Board of Directors created the MetroAccess Ad Hoc Advisory Committee (the "Committee") to review WMATA's MetroAccess paratransit service on February, 16, 2006; and

WHEREAS, The WMATA Board of Directors tasked the Committee with recommending improvements for MetroAccess service because of difficulties experienced by customers with the transition to a new service provider; and

WHEREAS, The Committee's work was guided by the recommendations for improving MetroAccess service in the *"Improving Demand Responsive Services for People with Disabilities in the Washington Region"* study conducted by the Transportation Planning Board (TPB) which identified shortcomings in existing MetroAccess paratransit services and made recommendations based on innovative practices from around the country; and

WHEREAS, The scope of the Committee included providing a venue for MetroAccess riders to give input into ways to improve service and incorporate rider recommendations; reviewing industry "best practices" for paratransit service; and responding to recommendations made by the TPB MetroAccess study; and

WHEREAS, The Committee established a team of paratransit industry experts and MetroAccess users, called the Best Practices Working Group, to complete a review of "best practices" in paratransit services and to address issues raised in the TPB report; and

WHEREAS, The scope of the Best Practices Working Group included examining industry best practices and policies in paratransit service pertaining to reservations, scheduling, dispatch and driver/vehicle operations; door-to-door v. curb-to-curb service; no-shows and late cancellation policy; same-day service; and human service transportation coordination; now, therefore be it

RESOLVED, That the WMATA Board of Directors amends the MetroAccess Late Cancellation and No-Show Policy to enable customers to cancel their trips without penalty up to two (2) hours prior to the beginning of the scheduled pick-up window; and be it further


RESOLVED, That the WMATA Board of Directors amends the MetroAccess ADA Paratransit Plan so that customers can reserve MetroAccess trips up to seven (7) days in advance of travel instead of fourteen (14) days; and be it further

RESOLVED, That the WMATA Board of Directors adopts all of the other cost-neutral recommendations as outlined in the Ad Hoc Advisory Committee and Best Practices Working Group report; and be it further

RESOLVED, That the WMATA Board of Directors approves the initiation and award of a consultant contract, not to exceed \$50,000, for the financial analysis of the cost-bearing recommendations included in the Committee's final report; and be it finally

RESOLVED, That this Resolution shall be effective immediately.

Reviewed as to form and legal sufficiency,



Carol B. O'Keeffe
General Counsel