



# PARATRANSIT, INC.

Fiscal Year 2020  
Operating and Capital  
Budget

# BOARD OF DIRECTORS

Patrick Hume, President

Anna Fontus, Vice President

Stephanie Nguyen, Treasurer

Scott Leventon, Secretary

Jill Faust

Steve Hansen

Alice Kimble

Vidhu Shekhar

# EXECUTIVE STAFF

Tiffani M. Fink, Chief Executive Officer

Tom Roberts, Deputy Executive Director

Dr. Lisa Cappellari, Chief Financial Officer

Mary Harding, Chief Operating Officer

Jesse Isaacson, Director of Information Technology

Christine Brown, Director of Human Resources

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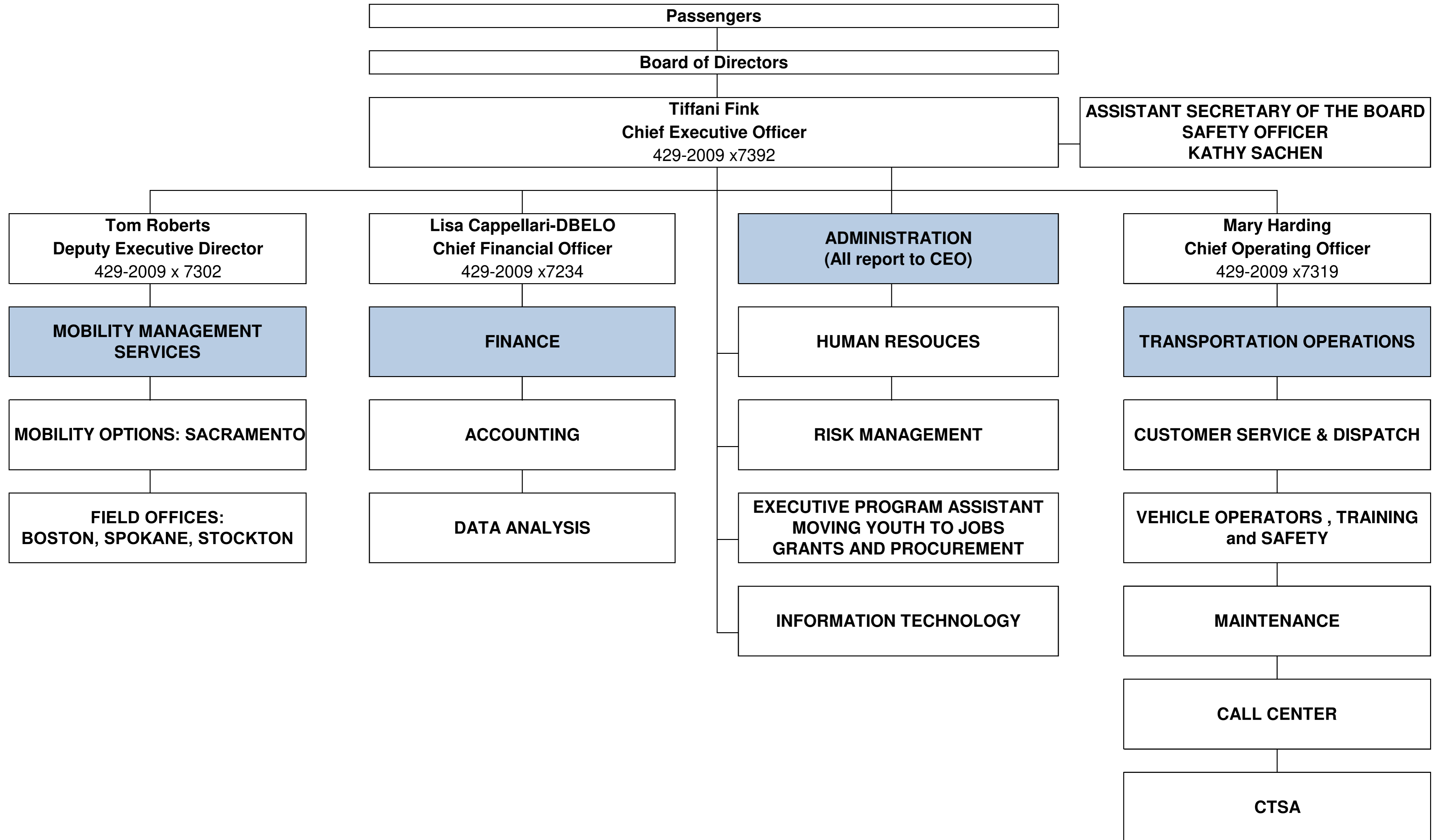
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**FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART**



**PARATRANSIT, INC. EXECUTIVE TEAM**

**Tiffani Fink**  
**Chief Executive Officer**  
429-2009 x7392

**DIVERSIFIED SERVICES and  
COMMUNITY PARTNERSHIPS**  
**Tom Roberts**  
**Deputy Executive Director**  
429-2009x7302

**FINANCE**  
**Lisa Cappellari**  
**Chief Financial Officer**  
429-2009 x7234

**ADMINISTRATION**  
**Vacant**  
**Chief Administrative Officer**  
429-2009 x7846

**TRANSPORTATION OPERATIONS**  
**Mary Harding**  
**Chief Operating Officer**  
429-2009 x7319

# Financial: Total Consolidated Revenue

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**OPERATING REVENUE**

Regional Transit	\$11,700,000
Measure A	5,823,122
Sacramento TDA	2,806,393
Section 5307 - Regional Mobility Management	200,000
DR Bus Fares	1,638,644
Agency Bus Fares	937,043
Diversified Services	3,707,676
Civic Lab Youth to Jobs	133,333
Applied to Capital Projects	(819,406)
<b>TOTAL OPERATING REVENUE</b>	<b>\$26,126,805</b>

**CAPITAL REVENUE**

FTA Section 5339	\$1,020,000
Applied Operating Revenue	819,406
<b>TOTAL CAPITAL REVENUE</b>	<b>\$1,839,406</b>

<b>TOTAL REVENUE</b>	<b>\$27,966,211</b>
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## Financial: Total Consolidated Operating Expense

### PERSONNEL:

Transportation Operations:	
Vehicle Operators	\$5,187,660
Training Center	222,437
Call Center	723,112
Operations Administration	239,212
Dispatch Center	791,136
Maintenance Operations	1,251,480
Administration:	
Finance & Human Resources	1,226,852
Information Systems	339,578
Diversified Services:	
Travel Training	183,177
Innovative Paradigms	1,118,862
Fringe Benefits	4,647,710
Workers' Compensation	639,217
<b>TOTAL PERSONNEL</b>	<b>\$16,570,433</b>

### FLEET OPERATIONS:

Fuel	\$2,125,033
Insurance	1,429,171
Cost of Parts & Sublet Service	742,105
<b>TOTAL FLEET OPERATIONS</b>	<b>\$4,296,309</b>

### NONPERSONNEL:

Professional Services	\$749,221
Outside Services	345,723
Rent & Repair	167,017
Office Expense	222,816
Interest Expense	124,290
Telephone/Utilities	254,283
Tax/License/Dues/Permits	89,993
Travel	133,614
Professional Development	32,207
Brokered Trans. Services	2,927,390
<b>TOTAL NONPERSONNEL</b>	<b>\$5,046,551</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$25,913,294</b>
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# Financial: Total Consolidated Capital Expense

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**CAPITAL PROJECTS:**

Florin Road Facility	<b>\$93,731</b>
Tools for Mechanics	<b>30,000</b>
Auditorium	<b>48,000</b>
Paint / Landscape Facility	<b>100,000</b>
IT 4G Equipment & Cameras	<b>100,000</b>
8 CNG Vehicles	<b>1,200,000</b>
Vehicle Acquisition Project	<b>227,674</b>
Miscellaneous Facility Improvements	<b>213,512</b>
Office Equipment	<b>10,000</b>
Network & Telecommunications	<b>20,000</b>
Maintenance Equipment	<b>10,000</b>
<b>TOTAL CAPITAL PROJECTS</b>	<b>\$2,052,918</b>

<b>TOTAL OPERATING AND CAPITAL EXPENSE</b>	<b>\$27,966,211</b>
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## Financial: Total Revenue By Functional Program

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	Demand Response Total	Demand Response ADA	Demand Response Non-ADA	CTSA
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### OPERATING REVENUE

Regional Transit	\$11,700,000	\$11,700,000		
Measure A	5,226,809	2,572,256	2,654,553	596,313
Sacramento TDA	2,560,754	2,560,754		245,639
Section 5307 - Regional Mobility Management				
DR Bus Fares	1,638,644	1,412,372	226,272	
Agency Bus Fares				937,043
Diversified Services	452,727	452,727		
Civic Lab Youth to Jobs				
Applied to Capital Projects	-819,406		-819,406	
<b>TOTAL OPERATING REVENUE</b>	<b>\$20,759,528</b>	<b>\$18,698,109</b>	<b>2,061,419</b>	<b>1,778,995</b>

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**Financial: Total Revenue By Functional Program**

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<b>Outside Maintenance</b>	<b>Sacramento Travel Training</b>	<b>Civic Lab Youth to Jobs</b>
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**OPERATING REVENUE**

Regional Transit			
Measure A			
Sacramento TDA			
Section 5307 - Regional Mobility Management		200,000	
DR Bus Fares			
Agency Bus Fares			
Diversified Services	855,776	50,213	
Civic Lab Youth to Jobs			133,333
Applied to Capital Projects			
<b>TOTAL OPERATING REVENUE</b>	<b>\$855,776</b>	<b>\$250,213</b>	<b>\$133,333</b>

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## Financial: Total Revenue By Functional Program

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Destinations Mobility Rentals	Mobility Management Department	Total
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### OPERATING REVENUE

Regional Transit			\$11,700,000
Measure A			5,823,122
Sacramento TDA			2,806,394
Section 5307 - Regional Mobility Management			200,000
DR Bus Fares			1,638,644
Agency Bus Fares			937,043
Diversified Services	133,748	2,650,561	3,707,676
Civic Lab Youth to Jobs			133,333
Applied to Capital Projects			(819,406)
<b>TOTAL OPERATING REVENUE</b>	<b>\$133,748</b>	<b>\$2,650,561</b>	<b>\$26,126,806</b>

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## Financial: Total Expense By Functional Program

	Demand Response Total	Demand Response ADA	Demand Response Non-ADA	CTSA
Transportation Operations:				
Vehicle Operators	\$4,951,587	\$4,267,847	\$683,740	\$236,074
Training Center	214,539	184,914	29,625	7,898
Call Center	697,437	601,131	96,306	25,675
Operations Administration	230,719	198,860	31,859	8,494
Dispatch Center	763,045	657,680	105,365	28,091
Maintenance Operations	918,688	791,831	126,857	168,092
Administration:				
Finance & Human Resources	966,657	833,177	133,480	58,129
Information Systems	267,559	230,613	36,946	16,089
Diversified Services:				
Sacramento Travel Training				
Mobility Management				
Fringe Benefits	3,552,712	3,062,013	490,576	237,237
Workers' Compensation	586,166	505,225	80,941	33,125
<b>TOTAL PERSONNEL</b>	<b>\$13,149,109</b>	<b>\$11,333,414</b>	<b>\$1,815,695</b>	<b>\$818,903</b>
Fuel	\$1,506,283	\$1,298,288	\$207,995	\$328,821
Insurance	1,183,465	1,020,046	163,419	157,836
Cost of Parts & Sublet Service	596,311	513,969	82,342	80,060
<b>TOTAL FLEET OPERATIONS</b>	<b>\$3,286,060</b>	<b>\$2,832,203</b>	<b>\$453,757</b>	<b>\$566,717</b>
Professional Services	\$643,719	\$554,831	\$88,888	\$34,466
Outside Services	172,872	149,001	23,871	15,414
Rent & Repair	133,862	115,377	18,485	7,128
Office Expense	151,634	130,696	20,938	10,130
Interest Expense	111,310	95,939	15,371	3,124
Telephone/Utilities	160,845	138,635	22,210	8,676
Tax/License/Dues/Permits	61,098	52,661	8,437	3,851
Travel	48,789	42,052	6,737	2,873
Professional Development	22,448	19,348	3,100	1,385
Brokered Trans. Services	2,927,390	2,523,161	404,229	
<b>TOTAL NONPERSONNEL</b>	<b>\$4,443,966</b>	<b>\$3,821,701</b>	<b>\$612,265</b>	<b>\$87,047</b>
<b>TOTAL OPERATING EXPENSE</b>	<b>\$20,869,135</b>	<b>\$17,987,418</b>	<b>\$2,881,717</b>	<b>\$1,472,668</b>

## Financial: Total Expense By Functional Program

	Outside Maintenance	Sacramento Travel Training
Transportation Operations:		
Vehicle Operators		
Training Center		
Call Center		
Operations Administration		
Dispatch Center		
Maintenance Operations	164,700	
Administration:		
Finance & Human Resources	19,582	25,267
Information Systems	5,420	6,994
Diversified Services:		
Sacramento Travel Training		183,177
Mobility Management		
Fringe Benefits	106,281	118,119
Workers' Compensation	7,311	1,610
<b>TOTAL PERSONNEL</b>	<b>\$303,294</b>	<b>\$335,167</b>
Fuel	\$289,547	
Insurance	5,505	1,295
Cost of Parts & Sublet Service	63,675	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$358,726</b>	<b>\$1,295</b>
Professional Services	\$4,815	\$7,708
Outside Services	5,603	1,574
Rent & Repair	2,813	1,633
Office Expense	6,377	2,021
Interest Expense	733	935
Telephone/Utilities	2,545	6,747
Tax/License/Dues/Permits	3,197	818
Travel	785	23,871
Professional Development	419	1,447
Brokered Trans. Services		
<b>TOTAL NONPERSONNEL</b>	<b>\$27,289</b>	<b>46,754</b>
<b>TOTAL OPERATING EXPENSE</b>	<b>\$689,310</b>	<b>\$383,217</b>

## Financial: Total Expense By Functional Program

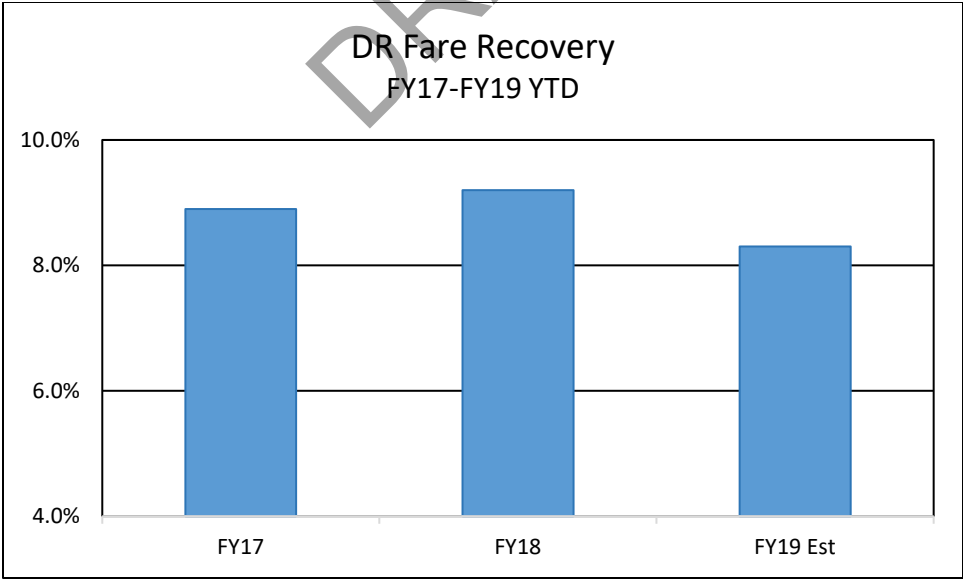
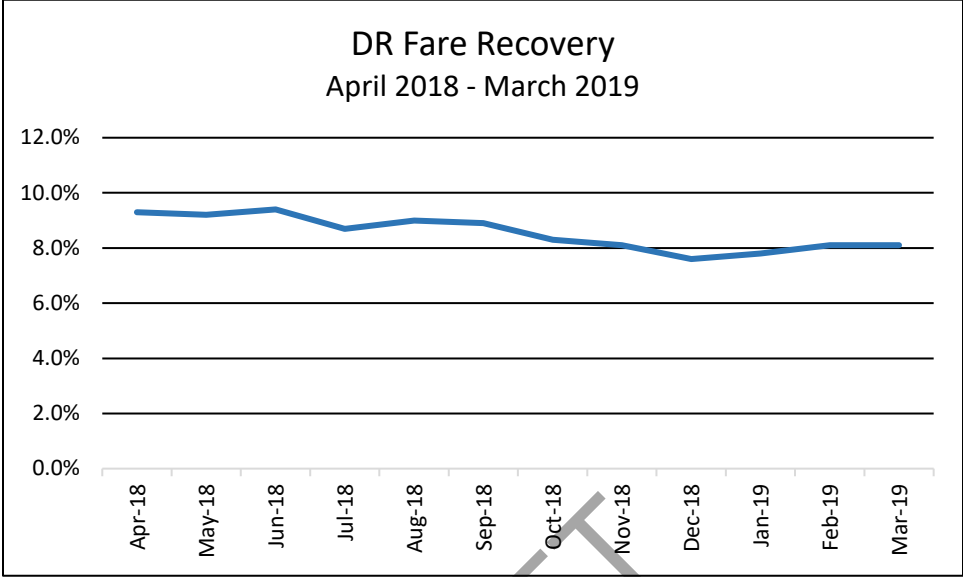
	Destinations Mobility Rentals	Mobility Management Department	Total
Transportation Operations:			
Vehicle Operators			\$5,187,661
Training Center			222,437
Call Center			723,112
Operations Administration			239,212
Dispatch Center			791,136
Maintenance Operations			1,251,480
Administration:			
Finance & Human Resources		157,217	1,226,852
Information Systems		43,516	339,578
Diversified Services:			
Sacramento Travel Training			183,177
Mobility Management		1,118,862	1,118,862
Fringe Benefits		633,361	4,647,710
Workers' Compensation		11,005	639,217
<b>TOTAL PERSONNEL</b>		<b>\$1,963,960</b>	<b>\$16,570,433</b>

Fuel	\$382		\$2,125,033
Insurance	13,125	67,944	1,429,171
Cost of Parts & Sublet Service	2,059		742,105
<b>TOTAL FLEET OPERATIONS</b>	<b>\$15,567</b>	<b>\$67,944</b>	<b>\$4,296,309</b>

Professional Services	\$3,006	\$55,506	\$749,221
Outside Services	329	149,931	345,723
Rent & Repair	5,710	15,871	167,017
Office Expense		52,653	222,816
Interest Expense		8,188	124,290
Telephone/Utilities	706	74,763	254,283
Tax/License/Dues/Permits	376	20,653	89,993
Travel		57,295	133,614
Professional Development		6,508	32,207
Brokered Trans. Services			2,927,390
<b>TOTAL NONPERSONNEL</b>	<b>\$10,127</b>	<b>\$441,368</b>	<b>\$5,046,551</b>

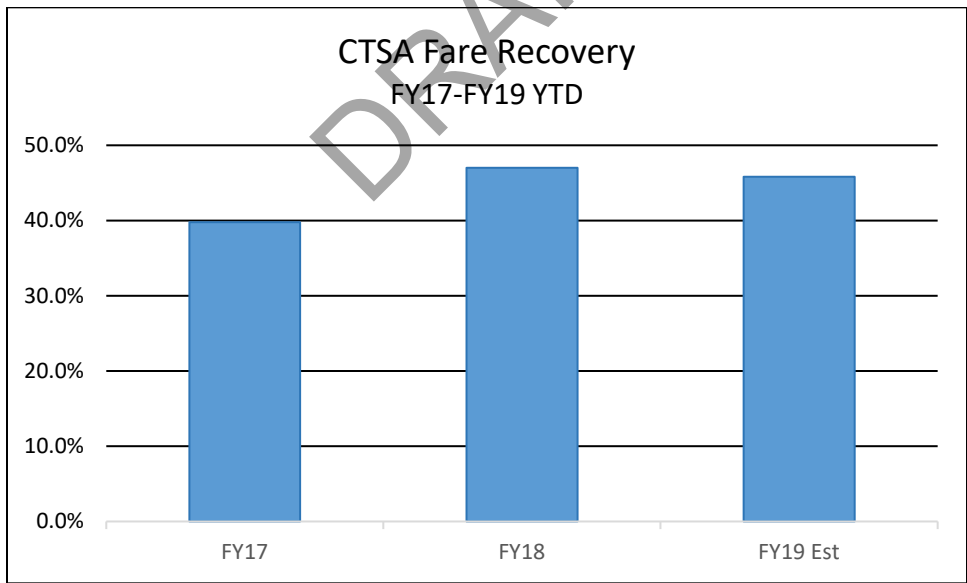
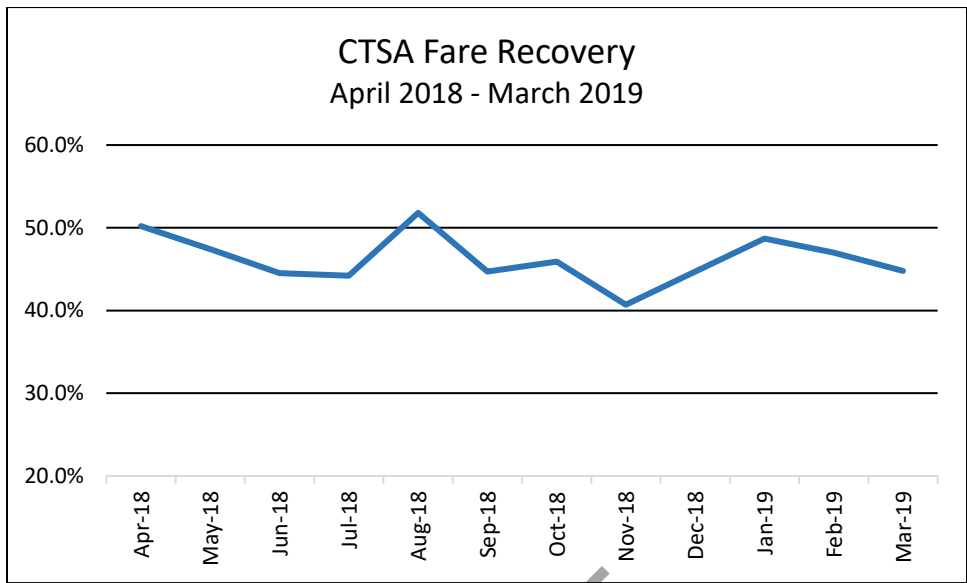
<b>TOTAL OPERATING EXPENSE</b>	<b>\$25,694</b>	<b>\$2,473,271</b>	<b>\$25,916,294</b>
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# Performance Metrics: Fare Recovery

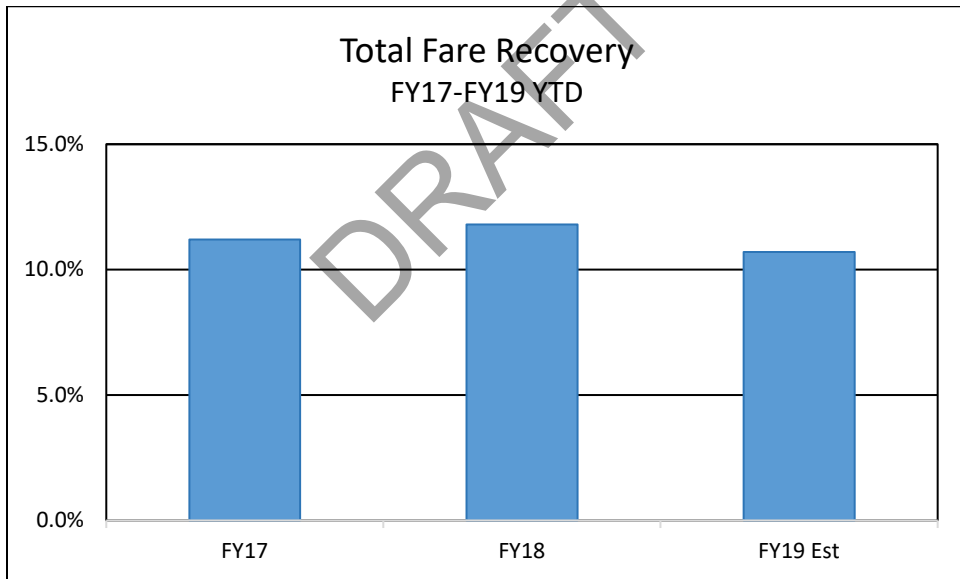
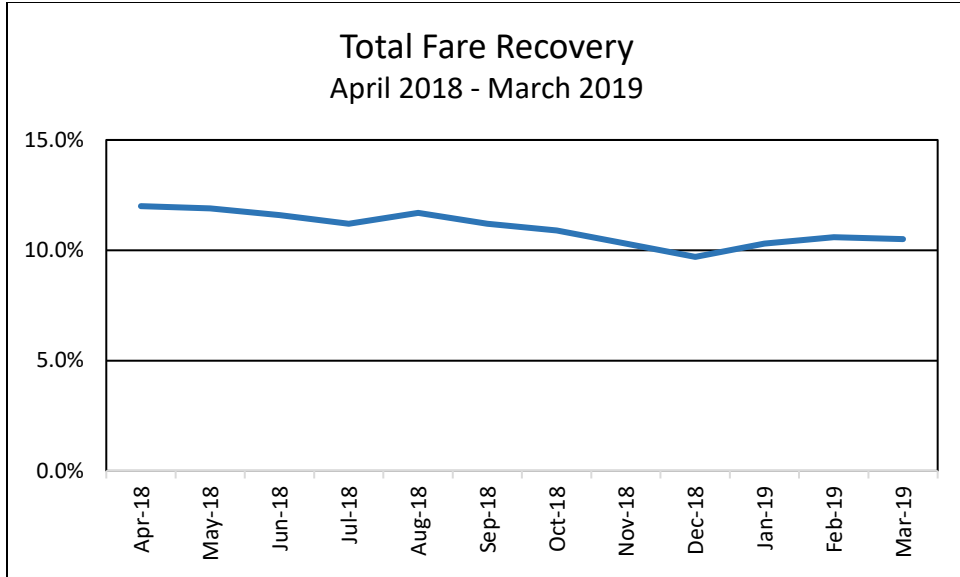


\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting



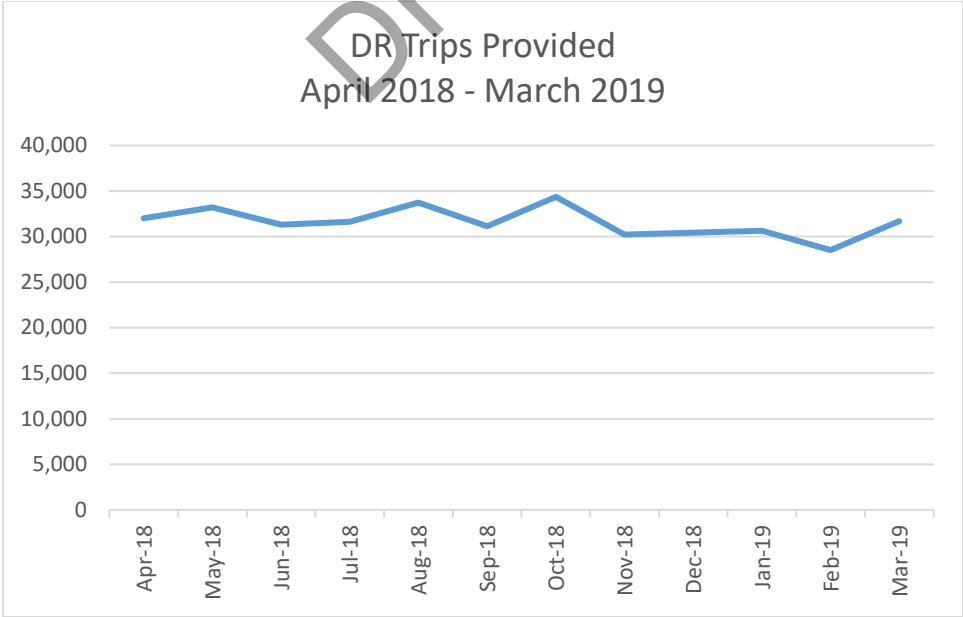
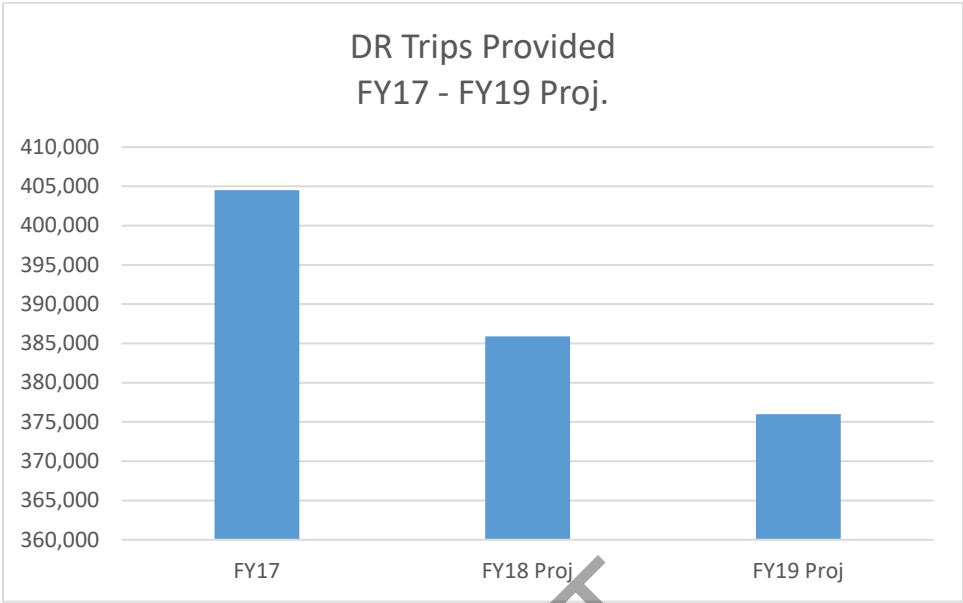


\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting



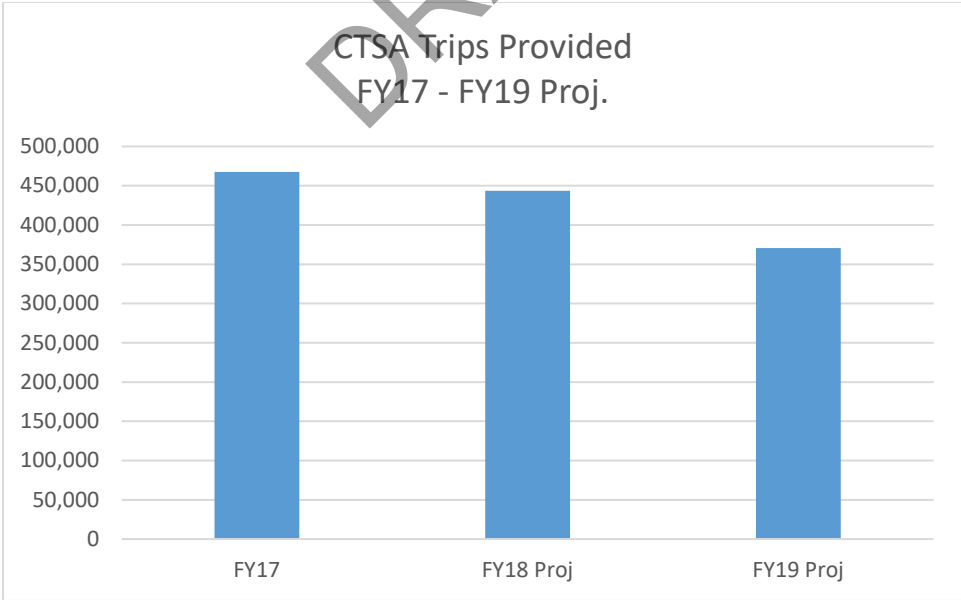
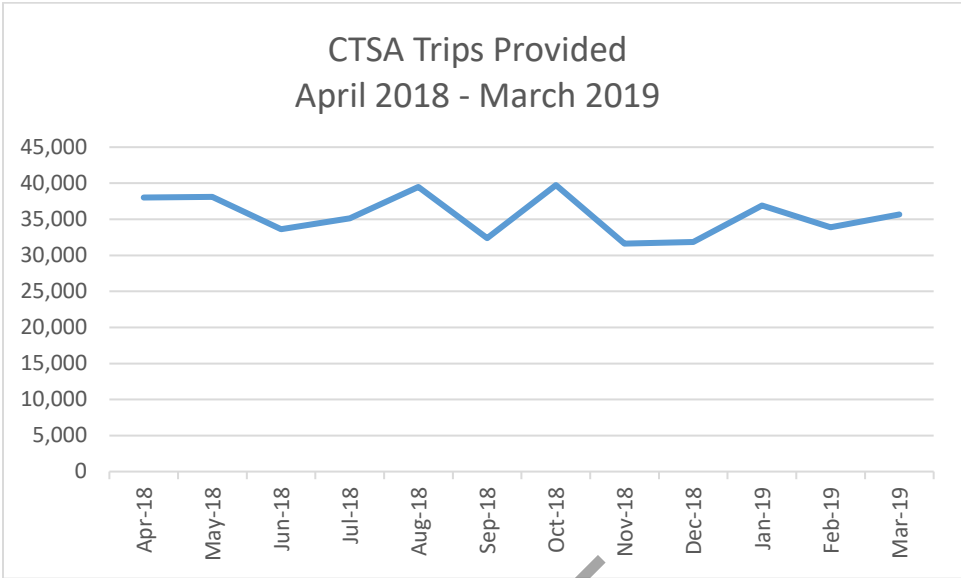
\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting

# Performance Metrics: Demand Response Trips Provided



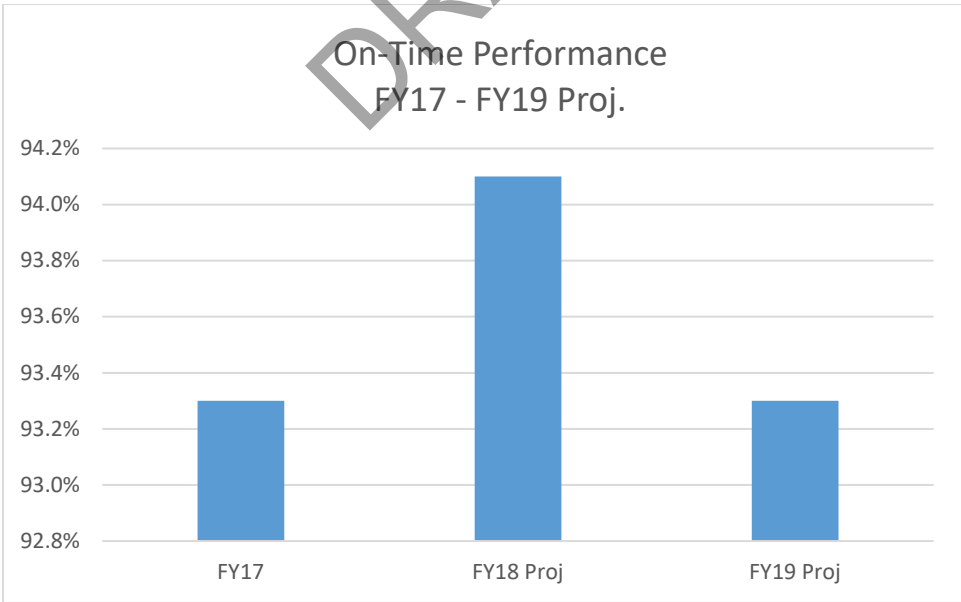
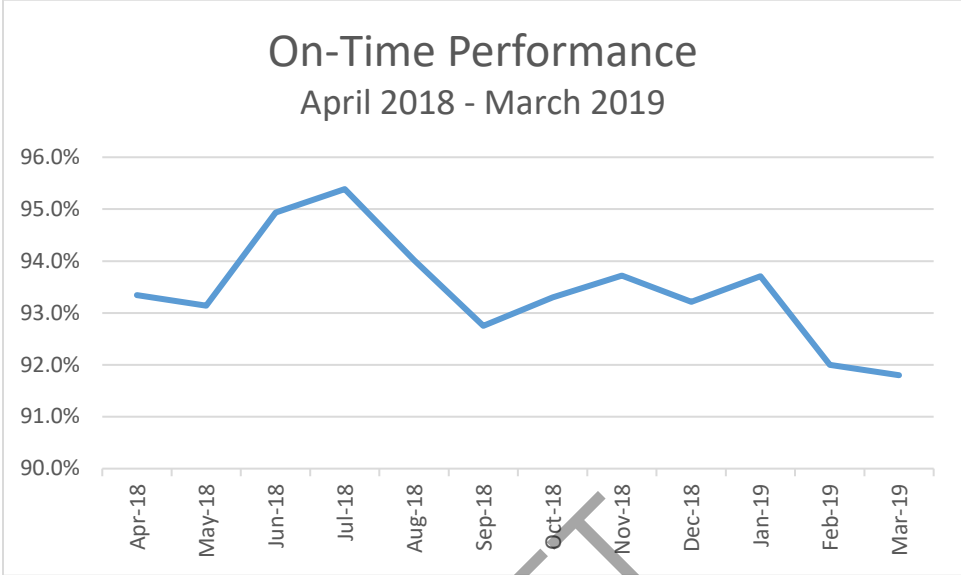
\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting

# Performance Metrics: CTSA Trips Provided



\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting

**Performance Metrics: On-Time Performance**



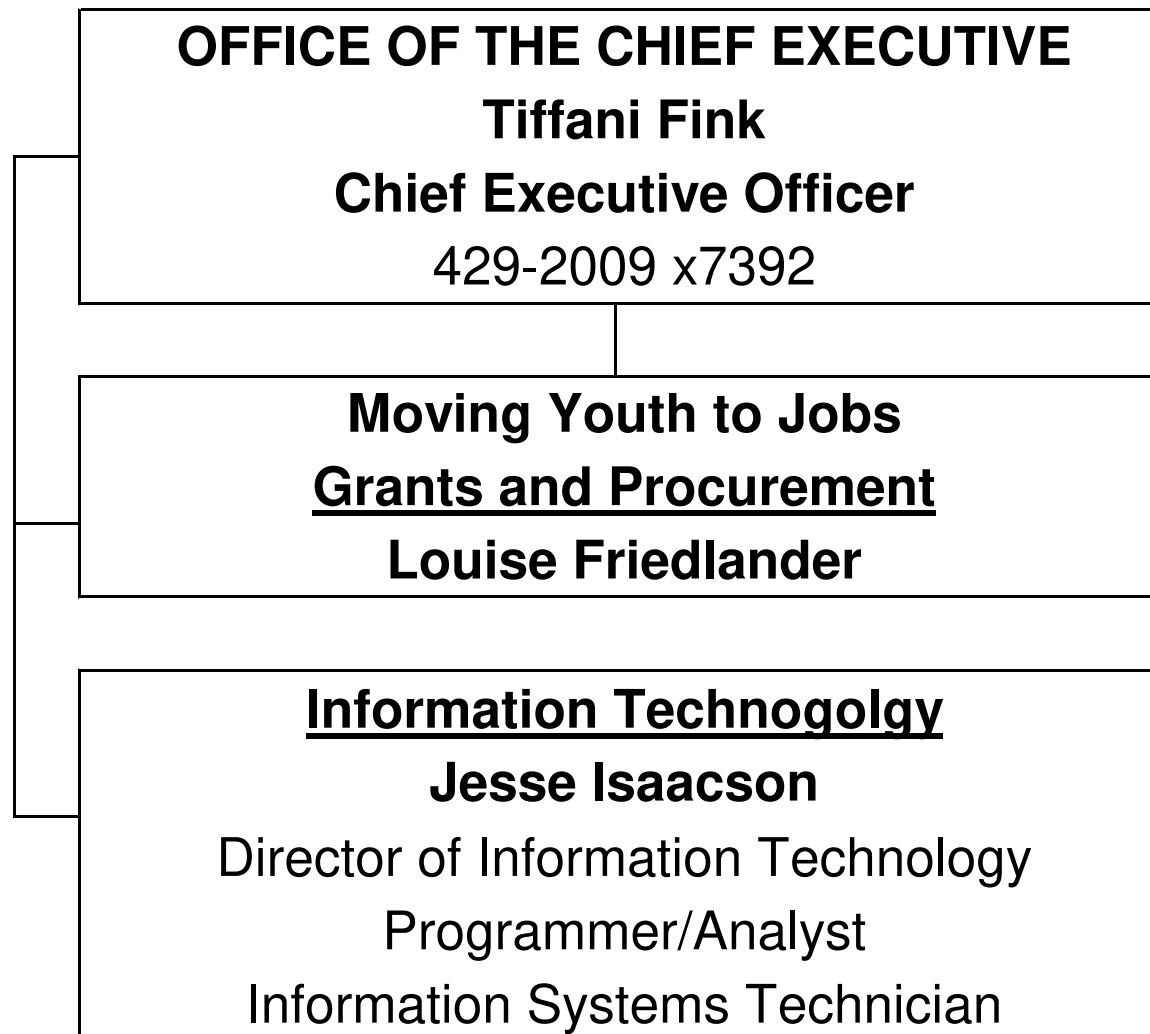
\*All reporting periods are April- March consistent with the ADA Paratransit Services Agreement reporting



# Administration

Office of the Chief Executive  
Administration  
Human Resources  
Moving Youth to Jobs  
Information Technology

**FY 2019/20**  
**PARATRANSIT, INC. ORGANIZATIONAL CHART**



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**FY 2019/20**  
**PARATRANSIT, INC. ORGANIZATIONAL CHART**



\* Kathy Sachen is acting Assistant Secretary of the Board

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## Administration: Office of the Chief Executive Officer

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The Office of the Chief Executive includes tasks and duties for programs which report directly to the Chief Executive Officer. Responsibilities include Contract Negotiations for the bargaining unit (Vehicle Operators), oversight and program management for the Moving Youth to Jobs project, Legislative tracking, and Grants Management. In addition, the Director of Information Technology and the Director of Human Resources report to the CEO for department activities.

### Key Projects for 2019/20:

#### Moving Youth to Jobs:

The program is managed by the Executive Program Assistant who coordinates with outside agencies, and the Sacramento Area Council of Governments, to determine the transportation needs of youth 16-18 and 18-24 years of age. Travel Training can offer youth the opportunity to reach job sites and social settings by accessing fixed route public transit. The program provides travel training, coordinates ridershare options, provides transportation literacy education and facilitates direct transportation (provided through the Operations Department.)

#### Legislative:

The Chief Executive Officer participates in both the CalACT and California Transit Association Legislative activities and is an active member with the Sacramento Metro Chamber participating in the both the State Legislative Summit and Capitol to Capitol trips. Staff will continue to monitor legislation related to transportation, transportation funding and new modes of mobility.

#### Grants Management:

The Chief Executive Officer, working with the Chief Financial Officer, is responsible for the preparation, oversight and reporting for all grants received by Paratransit, Inc. Included in this work is the development and updates of the Agency's Capital Improvement Program. The Executive Program Assistant and Accounts Receivable Specialist assist in the preparation of supporting documentation and preparation of invoicing.

#### Staffing:

Position	FY 17/18	FY 18/19	Difference
Chief Executive Officer	1	1	
Executive Program Assistant	1	1	
<b>TOTAL FTEs</b>	<b>2</b>	<b>2</b>	

## **Office of the Chief Executive: Moving Youth to Jobs Project**

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Mobility is central to all our lives, and the most significant barriers to youth participation in the workforce is transportation. Paratransit Inc.'s Moving Youth to Jobs Travel Training program was initiated to help students and young adults throughout the region navigate fixed bus route, light rail, Jump Bike and Smart Ride Systems independently thus ensuring they have the transportation resources they need to arrive to work on time. Since the launch of this innovative program we have seen a huge success of students and young adults no longer relying on family and friends for their transportation needs. They are achieving a level of independence that gives them the confidence and skills needed to become successful and productive members of their respected communities.

Paratransit Inc. staff participates in on-going outreach and marketing events, working with impoverished youth organizations, foster youth transitioning into adulthood, youth escaping human trafficking, college campuses, workability programs, trade schools, high schools and back to school night functions. Through these efforts Paratransit Inc. has presented to over 200 youth and young adults throughout Sacramento County and we project this number to double before the end of year.

### **Civic Lab Moving Youth to Jobs Project:**

The Civic Lab is a team effort supported by Paratransit, the Sacramento Area Council of Governments (SACOG) and other local and partnering agencies who work together to foster and promote smart mobility options through innovation and the creation of new technologies.

Paratransit Inc., together with North State Building Industry Foundation, transportation providers, and school representatives, participated in a nine-month Civic Lab process identifying barriers, developing a project scope, and brainstorming innovative ways to transport youth and young adults to/from work. In May 2018, the Moving Youth to Jobs project was the first to be funded through the Sacramento Transit Authority (STA) for services in Sacramento County.

### **Existing Year One Program Elements:**

Paratransit Inc.'s Travel Training program is intended as an opportunity for students and young adults to be able to navigate the fixed routes, light rail systems independently. By acquiring specific travel/mobility skills, these students and young adults will be empowered to travel efficiently and arrive to work on time. It also affords them an opportunity to utilize public transportation to reach other destinations of their choice. Our expert, one-on-one training program, includes, but is not limited to 1) teaching participants how to get to and from the bus stop or light rail station; 2) engages them in acquiring skills in the use of Jump Bike and SmartRide services; 3) heightens their sense of awareness of people around them, and their surroundings in general; 4) provides instruction on downloadable applications; 5) maps and schedule.

This training is from their closest bus stop to the bus stop or light rail closest to their job-site. During the trip, pertinent information will be discussed and reviewed along with time management and safety awareness skills. This training usually takes one trip but if needed we can work with them more. What is vital to their success is being aware on how to navigate through the system effectively, safety awareness, the options on the use of other modes of transportation these being Jump Bike and Smart Ride. Maps, schedules and having a backup plan should the need arise will be discussed. Once they are successful the trainer will provide them with a Connect Card loaded with half a month's fare and the trainer will walk them through on the registration process, the utilization of the card and how to upload fare in the future. The ultimate goal is for these young adults to have independence and to be able to go where they want without relying on friends and family at all times to get there.

**Upcoming Program Elements for Year Two:**

- Continuation of all Year One Goals
- Expansion of CTSA services for Youth including expanded bus partnership program
- Employment development pathway programs with Community Partners for employment at Paratransit
- Direct transportation to Youth accessing Construction Jobs and Summer Internships
- Introduce Bike Buddy Program

**Year One Statistics**

Referral Sources	Youth Reached	Participants	Pending	Civic Summer Intern	Summer @ City Hall Intern
22	225	74	9	2 <sup>nd</sup> Year	1 <sup>st</sup> year

## **Administration**

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The Administrative department of Paratransit, Inc. provides oversight and ensures compliance of many functions within the Agency. Responsibilities include processing and distributing daily mail, answering the operator bound phone calls, selling, billing, mailing, ordering and reconciling of ride coupons and passes, ordering and maintaining office supplies, monitoring, processing, and filing of contracts, agreements, and memorandums of understanding, maintaining the main files of the company.

### **Board Administration**

Administration is also responsible for preparing Board packets and documents, scheduling and preparing for Board meetings and additional Committee meetings of the Board of Directors, preparing minutes, follow-up with Board members for a variety of purposes and adhering to the rules and regulations of the Brown Act.

Administration is responsible for maintaining the conflict of interest code, form 700 filings for specified staff and the Board of Directors and follow up.

### **Risk Management**

Administration also monitors and reports any insurance claims filed against Paratransit, Inc. and follows the timelines required for follow up on claims. It also processes all insurance renewals for policies in Sacramento, Spokane, Boston, Honolulu, and Modesto including securing renewal certifications and certifications for new contracts.

Administration also provides Credit card administration, check signing authority, and updates and maintains a variety of licenses and bonds for various entities in all departments and offices, and participates in the development of the Collective Bargaining Agreement with union employees.

### **Performance Metrics:**

We sell approximately 6,864 coupons per month and 216 monthly passes including the 44-ride coupon/pass combination from Sacramento Regional Transit District.

Mail processing requires a minimum of \$600 per month in postage.

Office supplies are ordered on an as needed basis by department with supervisor approval and run approximately \$1,100 per month.

Telephone Operators (3) handle approximately 16,562 phone calls annually.

**Staffing:**

<b>Position</b>	<b>FY 18/19</b>	<b>FY 19/20</b>	<b>Difference</b>
Deputy Executive Director	1	1	
Chief Administrative Officer	1	0	-1
Grants and Procurement Manager	0	0	
Senior Clerk	1	1	
Clerk	1	1	
Administrative Clerk	1	0	-1
Administrative Assistant	0	1	+1
Part-time Clerk	.5	0	-.5
<b>TOTAL FTEs</b>	<b>5.5</b>	<b>5.5</b>	

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## ADMINISTRATION: PARATRANSIT EXECUTIVE OFFICE

### PERSONNEL:

Direct Personnel	\$534,016
Fringe Benefits	\$219,241
Workers' Compensation	\$3,701
<b>TOTAL PERSONNEL</b>	<b>\$756,958</b>

### FLEET OPERATIONS:

Fuel	\$0
Insurance	\$0
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### NONPERSONNEL:

Professional Services	\$232,843
Outside Services	\$66,099
Rent & Repair	
Office Expense	\$57,322
Interest Expense	\$39,262
Telephone/Utilities	
Tax/License/Dues/Permits	
Travel	\$17,880
Professional Development	\$8,268
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$421,674</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$1,178,632</b>
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## HUMAN RESOURCES

The Human Resources Division is responsible for all activities and functions in the employee lifecycle for both bargaining and non-bargaining units. We focus on recruiting qualified candidates for available positions, handling the onboarding process, benefits administration, assisting divisions with employee development and performance management. We also manage all leaves of absence, the workers' compensation program, the interactive process for assessing reasonable accommodation requests, drug and alcohol testing program for safety-sensitive employees and the unemployment claims process. In addition, the division is responsible for policy development and implementation, supervisory training and administration of the Collective Bargaining Agreement, including the grievance and arbitration process.

### METRICS

#### Average Days to Fill (By Position):

<u>Position</u>	<u>FY 2018-2019</u>	<u>FY 2019-2020</u>
Accounting Specialist	-----	27 days
Administrative Assistant	25 days	43 days
Administrative Mobility Specialist	7 days	5 days
Administrative Specialist	9 days	-----
Assistant Manager	-----	66 days
Clerk	-----	46 days
Communications Dispatcher	45 days	56 days
Human Resources Clerk	-----	53 days
Human Resources Supervisor	-----	144 days
Information Systems Technician	41 days	62 days
Mechanic C	18 days	-----
Mobility Coordinator I	28 days	68 days
Mobility Trainer	24 days	44 days
Program Coordinator	21 days	-----
Program Manager	77 days	-----
Programmer/Analyst	53 days	52 days
Reservationist	36 days	62 days
Server Technician	-----	-----
Service Assistant/Fueler	15 days	66 days
Transit Accessibility Evaluator	-----	62 days
Transportation Operations Clerk	-----	32 days
Transportation Operations Supervisor	-----	47 days
Vehicle Operator	90 days	57 days

Average Turnover (By Position):

Position	FY 2017-2018	FY 2018-2019
Accounting Specialist	-----	33%
Administrative Assistant	29%	143%
Administrative Manager <sup>+</sup>	100%	-----
Administrative Mobility Specialist (Office Closed)	-----	100%
Assistant Manager <sup>+</sup>	-----	100%
Call Center Shift Supervisor*	67%	40%
Clerk	50%	-----
Communications Dispatcher*	100%	38%
Customer Service Representative*	100%	-----
Division Chief <sup>+</sup>	100%	-----
Executive Assistant <sup>+</sup>	100%	-----
Facility Support Technician <sup>+</sup>	100%	-----
Human Resources Clerk	-----	50%
Information Systems Technical Supervisor <sup>+</sup>	100%	-----
Information Systems Technician	50%	-----
Managing Director of Consulting Services**	100%	-----
Mechanic C	33%	-----
Mobility Coordinator (Office Closed)	-----	100%
Mobility Coordinator I	40%	33%
Mobility Coordinator II	50%	-----
Mobility Management Services Advisor <sup>+</sup>	-----	100%
Mobility Trainer	71%	67%
Program Coordinator <sup>+</sup>	100%	-----
Program Manager	33%	33%
Programmer/Analyst	100%	100%
Programmer Analyst Supervisor <sup>+</sup>	100%	-----
Reservationist*	70%	25%
Route Reconciliation Technician*	100%	-----
Senior Clerk*	50%	-----
Senior Consultant	50%	-----
Senior Reservationist	25%	67%
Server Technician**	100%	-----
Service Assistant	11%	50%
Student intern	-----	50%
Transportation Operations Clerk	50%	-----
Transportation Operations Scheduler*	50%	-----
Transportation Operations Specialist	-----	100%
Transportation Operations Supervisor	-----	50%
Transportation Operations Trainer	-----	33%
Vehicle Operator	30%	30%

\*Denotes positions affected by the layoffs in May 2017



+Denotes a single position within the classification

HR Complaint By Category:

<u>Type of Complaint</u>	<u>FY 2017-2018</u>	<u>FY 2018-2019</u>
Unlawful Discrimination	0	1
Unlawful Harassment	4	1
Privacy Issues	0	1
CBA Violation (may result in a grievance)	5	2

Average Complaint Resolution Time:

<u>Type of Complaint</u>	<u>FY 2017-2018</u>	<u>FY 2018-2019</u>
Unlawful Discrimination	-----	43 business days
Unlawful Harassment	19 business days	4 business days
Privacy Issues	-----	4 business days
CBA Violation (may result in a grievance)	23 business days	10 business days

Performance Goals for Fiscal Year 2019-2020:

1. Reduce time to fill positions to 45 days or less;
2. Reduce turnover by 10% in each category except Administrative Assistances and Vehicle Operators;
3. Reduce turnover by 100% for Administrative Assistants;
4. Reduce turnover by 15% for Vehicle Operators; and
5. Reduce complaint resolution time to 30 business days or less.

## **ADMINISTRATION: HUMAN RESOURCES**

### **PERSONNEL:**

Direct Personnel	\$244,985
Fringe Benefits	\$100,579
Workers' Compensation	\$1,698
<b>TOTAL PERSONNEL</b>	<b>\$347,262</b>

### **FLEET OPERATIONS:**

Fuel	\$0
Insurance	\$0
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### **NONPERSONNEL:**

Professional Services	\$106,819
Outside Services	\$30,324
Rent & Repair	
Office Expense	\$26,297
Interest Expense	\$18,012
Telephone/Utilities	
Tax/License/Dues/Permits	
Travel	\$8,203
Professional Development	\$3,793
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$193,447</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$540,709</b>
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## Office of the Chief Executive Officer: Information Technology

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The Information Systems department performs a myriad of tasks for Paratransit, Inc., both locally in Sacramento and in all of our field offices; almost everything with a plug is within the bailiwick of the team. The department is split into two functional areas: technical and programming. The technicians are responsible for maintenance of the Shoretel phone system, Trapeze scheduling software, FileMaker Data Management System (DMS), Sonitrol security system, ADP time clocks, SAGE accounting servers, GroupWise email systems, in-vehicle technology, all workstations, and many others. They plan repair schedules, upgrade servers, maintain mobile equipment, track of hundreds of tickets in the ticketing system and keep everything running smoothly behind the scenes. The programmers are responsible for creating new software technologies, adapting existing programs, creating and modifying reports and general maintenance of any home-grown applications. They build new web pages and database queries to expand and simplify Paratransit's operations. Most of all, the employees of the Information Systems department work as a team to support almost every aspect of the company, from gigantic projects to everyday tweaks. The team must categorize, prioritize and schedule tasks from every department to help Paratransit better function smoothly and efficiently.

### Performance Metrics:

- 1) Improve percentage of tickets solved in first 72 hours to 90%.
- 2) Track response time to emails and tickets – keep under 4 hours for non-critical issues. Under 20 minutes for on-call emergencies.
  - a. In FY 19, almost every on-call emergency was addressed in under 15 minutes. Sometimes the solution took longer, but the work had begun.
- 3) Track major system down time (DMS, Trapeze, etc.) and keep under .5% of work hours.
  - a. For FY19, we accomplished this goal. In combination, the DMS and Trapeze servers were only down for 15 total work hours throughout the entire year.
- 4) Create “comment/scorecard” to track effectiveness and opinion of IT department

### Current Large Projects:

- 1) Create brand-new, web-based Data Management System
- 2) Install web based trip booking (PASS WEB) by the end of summer
- 3) Analyze and optimize PASS (Trapeze) parameters
- 4) Upgrade DMS to include the ability to operate without signal
- 5) Upgrade in-vehicle Rangers to operate on 4G
- 6) Install all IT equipment in new buses, including new camera systems in some

## Staffing

<b>Position</b>	<b>FY 18/19</b>	<b>FY 19/20</b>	<b>Difference</b>
Director of Information Technology	1	1	
Information Systems Technical Supervisor	0	0	
Programmer/Analyst Supervisor	0	0	
Programmer/Analyst	2	3	+1
Information Systems Technician	3	3	
<b>TOTAL FTEs</b>	<b>7</b>	<b>7</b>	<b>+1</b>

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## OPERATIONS: INFORMATION SYSTEMS

### PERSONNEL:

Direct Personnel	\$339,578
Fringe Benefits	\$134,710
Workers' Compensation	\$2,335
<b>TOTAL PERSONNEL</b>	<b>\$476,623</b>

### FLEET OPERATIONS:

Fuel	-
Insurance	-
Cost of Parts & Sublet Service	-
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

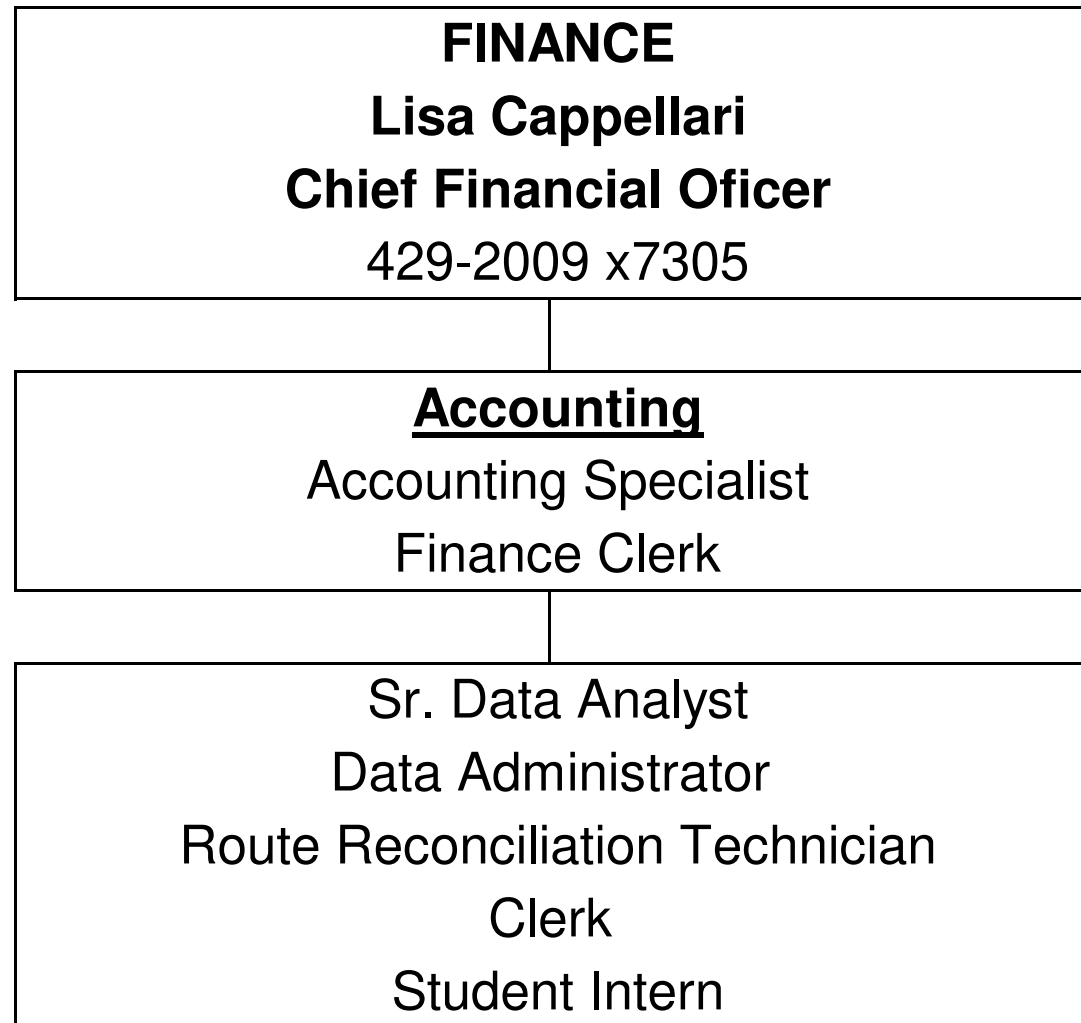
### NONPERSONNEL:

Professional Services	\$148,064
Outside Services	\$42,032
Rent & Repair	
Office Expense	\$36,451
Interest Expense	\$24,966
Telephone/Utilities	
Tax/License/Dues/Permits	
Travel	\$11,370
Professional Development	\$5,257
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$268,140</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$744,764</b>
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FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART



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## Finance: Accounting and Administration

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The objective of the Accounting Division is to create an accurate financial picture of the agency. This is accomplished when Accounts Payable, Accounts Receivable and Payroll personnel adhere to the generally accepted accounting principles (GAAP). An accurate financial picture helps managers make decisions; it aids the Board of Directors in prescribing strategic guidance; and it gives external agencies a transparent view on how Paratransit spends its funds. The general Administrative personnel and expense associated with the management of the Finance Department are also included.

### Performance Metrics:

	FY19	FY20
Current Ratio: current assets to current liabilities	3.5	>= 3.0
Operating revenue growth	-13%	> 0%
% of Capital Expense covered by grants	32%	>= 50%
AR: % of receivables > 90 days old	23%	<= 25%

### Staffing:

Position	FY 18/19	FY 19/20	Difference
Chief Financial Officer	1	1	0
Senior Data Analyst	1	1	0
Payroll Specialist	1	1	0
Accounts Receivable Specialist	1	1	0
Accounts Payable Specialist	1	1	0
Accounting Specialist	1	0	-1
Grants Analyst	0	1	1
<b>TOTAL FTEs</b>	<b>6</b>	<b>6</b>	<b>0</b>



## **FINANCE: ACCOUNTING AND ADMINISTRATION**

### **PERSONNEL:**

Direct Personnel	\$327,213
Fringe Benefits	\$134,338
Workers' Compensation	\$2,268
<b>TOTAL PERSONNEL</b>	<b>\$463,819</b>

### **FLEET OPERATIONS:**

Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### **NONPERSONNEL:**

Professional Services	\$142,673
Outside Services	\$40,502
Rent & Repair	
Office Expense	\$35,123
Interest Expense	\$24,057
Telephone/Utilities	
Tax/License/Dues/Permits	
Travel	\$10,956
Professional Development	\$5,066
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$258,377</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$722,196</b>
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## Finance: Statistics

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The objective of the statistics division is to ensure correct reporting of operating data such as trips, miles and hours. These data are used by internal managers, external agencies who provide Paratransit with funding, as well as state and federal agencies. Since these data are used as a mechanism both to determine funds received by Paratransit as well as funds received by the Sacramento area as a whole, employees processing operating data must be detail-oriented, accurate, and have the ability to spot inconsistencies.

### Performance Metrics:

<b>Performance Measures</b>	<b>FY19</b>	<b>FY20</b>
Number of days at month end to process DR stats	45	45
Number of days at month end to process CTSA stats	60	50

### Staffing:

<b>Position</b>	<b>FY 18/19</b>	<b>FY 19/20</b>	<b>Difference</b>
Data Administrator	1	1	0
Route Reconciliation Technician	1	1	0
Clerk	1	1	0
Student Intern (Transferred from Admin)	0	1	1
<b>TOTAL FTEs</b>	<b>3</b>	<b>4</b>	<b>1</b>

## FINANCE: STATISTICS

### PERSONNEL:

Direct Personnel	\$120,638
Fringe Benefits	\$49,528
Workers' Compensation	\$836
<b>TOTAL PERSONNEL</b>	<b>\$171,002</b>

### FLEET OPERATIONS:

Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### NONPERSONNEL:

Professional Services	\$52,601
Outside Services	\$14,932
Rent & Repair	
Office Expense	\$12,949
Interest Expense	\$8,870
Telephone/Utilities	
Tax/License/Dues/Permits	
Travel	\$4,039
Professional Development	\$1,868
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$95,259</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$266,262</b>
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# Operations

Customer Service and Dispatch

Driving and Training

Maintenance

Call Center

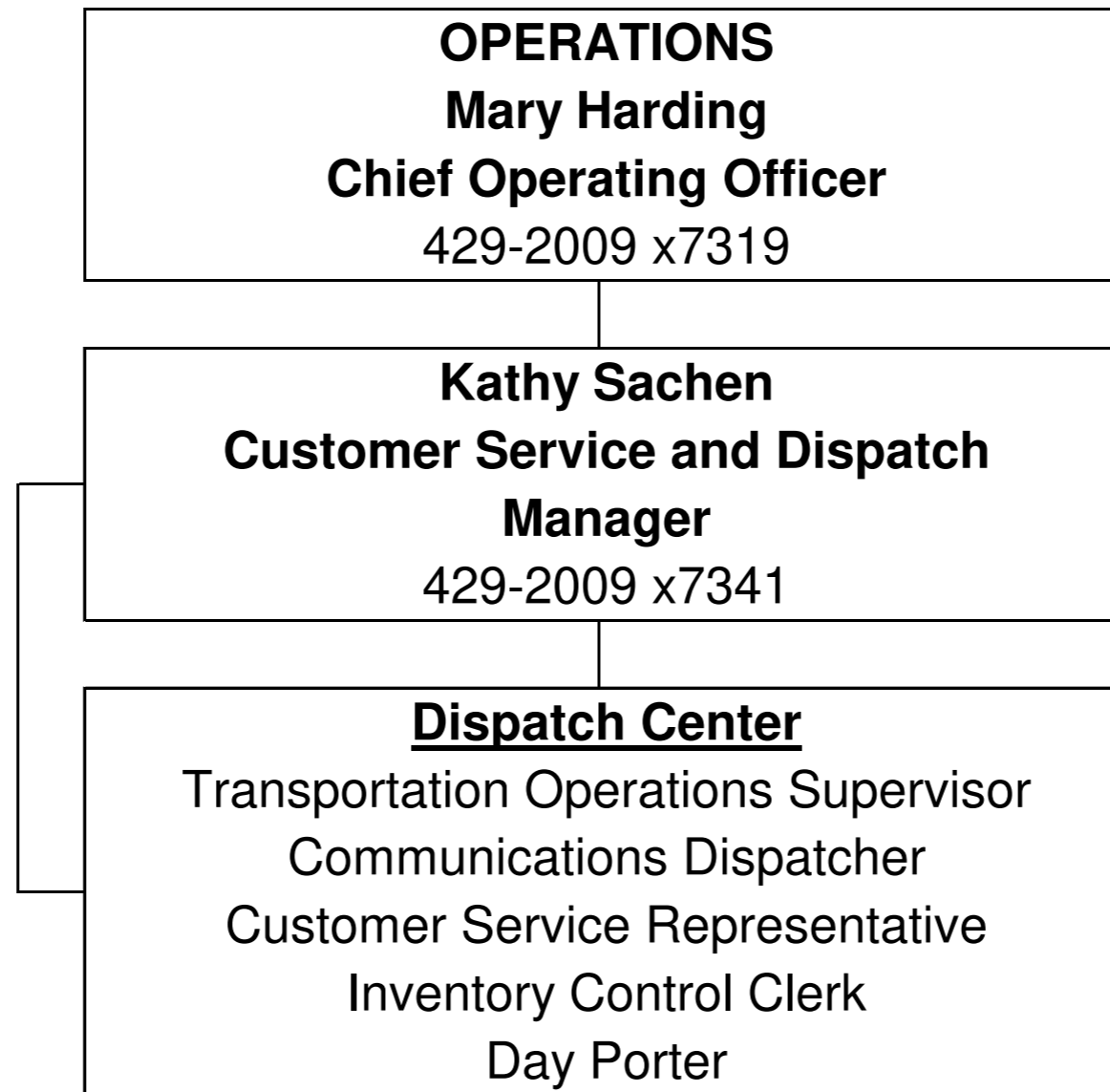
Scheduling

Wheelchair Accessible Van Rentals

Facilities

CTSA

FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART



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## Operations: Customer Service and Administration

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The purpose of this Division is to provide customer service and support to assigned department. This position will perform call center and analytical duties pertaining to departmental need. This will be accomplished by, but not limited to, answering incoming calls; actively listening and documenting Customer concerns; opening customer service reports; researching using intranet programs; processing Customer Service activities, communicating and assisting with adjacent departments.

### FY 18-19

1. Continue to provide excellent customer service.
2. Continue to assist other departments.
3. Provide cross training to other positions to assist with providing this service.
4. Assume oversight of the rental van services and assist clients.

### FY 19-20

1. Implement a new Customer Service Module to accommodate the Reasonable Modifications.
2. Objectives is to continue to meet objectives from previous FY

### Staffing

<b>Position</b>	<b>FY 18-19</b>	<b>FY 18-19</b>	<b>Difference</b>
Customer Service Representative	0	0	0
Operations Clerk	2	2	0
<b>TOTAL FTEs</b>	<b>2</b>	<b>2</b>	<b>0</b>

**OPERATIONS: CUSTOMER SERVICE AND  
ADMINISTRATION**

**PERSONNEL:**

Direct Personnel	\$239,212
Fringe Benefits	\$112,913
Workers' Compensation	\$1,498
<b>TOTAL PERSONNEL</b>	<b>\$353,624</b>

**FLEET OPERATIONS:**

Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

**NONPERSONNEL:**

Professional Services	
Outside Services	
Rent & Repair	\$4,088
Office Expense	
Interest Expense	
Telephone/Utilities	\$4,891
Tax/License/Dues/Permits	\$1,937
Travel	
Professional Development	
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$10,916</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$364,540</b>
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## Operations: Dispatch Center

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To dispatch and monitor vehicle operators, route assignments and schedules, vehicle effectiveness, and passenger service on established bus routes; to receive, transmit, and monitor radio communications with/between vehicle operators accurately; and to maintain excellent customer service.

### FY 18-19

1. Started FY 18-19 with eight (8) dispatchers; will end the FY with nine (9) dispatchers.
2. Non-ADA service hours shortened, March 1, 2019. The average close time is midnight. This action has decreased overtime per day for both dispatchers and vehicle operators.
3. We continue monitoring routes – eliminated dead head on routes by pulling off trips on taxi service and UCP Shuttle.
4. Enhanced focus on minimizing brokered trips.

### FY 19-20

1. Officially, create two positions for Dispatch Assistants to oversee the daily operations.
2. Near the end of FY 18-19, redesign the dispatch center to be ergonomically for staff.
3. Objectives is to continue to meet objectives from previous FY

## Staffing

Position	FY 18-19	FY 19-20	Difference
Dispatch & Customer Service Manager	1	1	0
Communications Dispatcher	8	10	+2
Operations Specialist	2	0	-2
<b>TOTAL FTEs</b>	<b>11</b>	<b>11</b>	<b>0</b>



## OPERATIONS: DISPATCH CENTER

### PERSONNEL:

Direct Personnel	\$791,136
Fringe Benefits	\$394,736
Workers' Compensation	\$8,731
<b>TOTAL PERSONNEL</b>	<b>\$1,194,603</b>

### FLEET OPERATIONS:

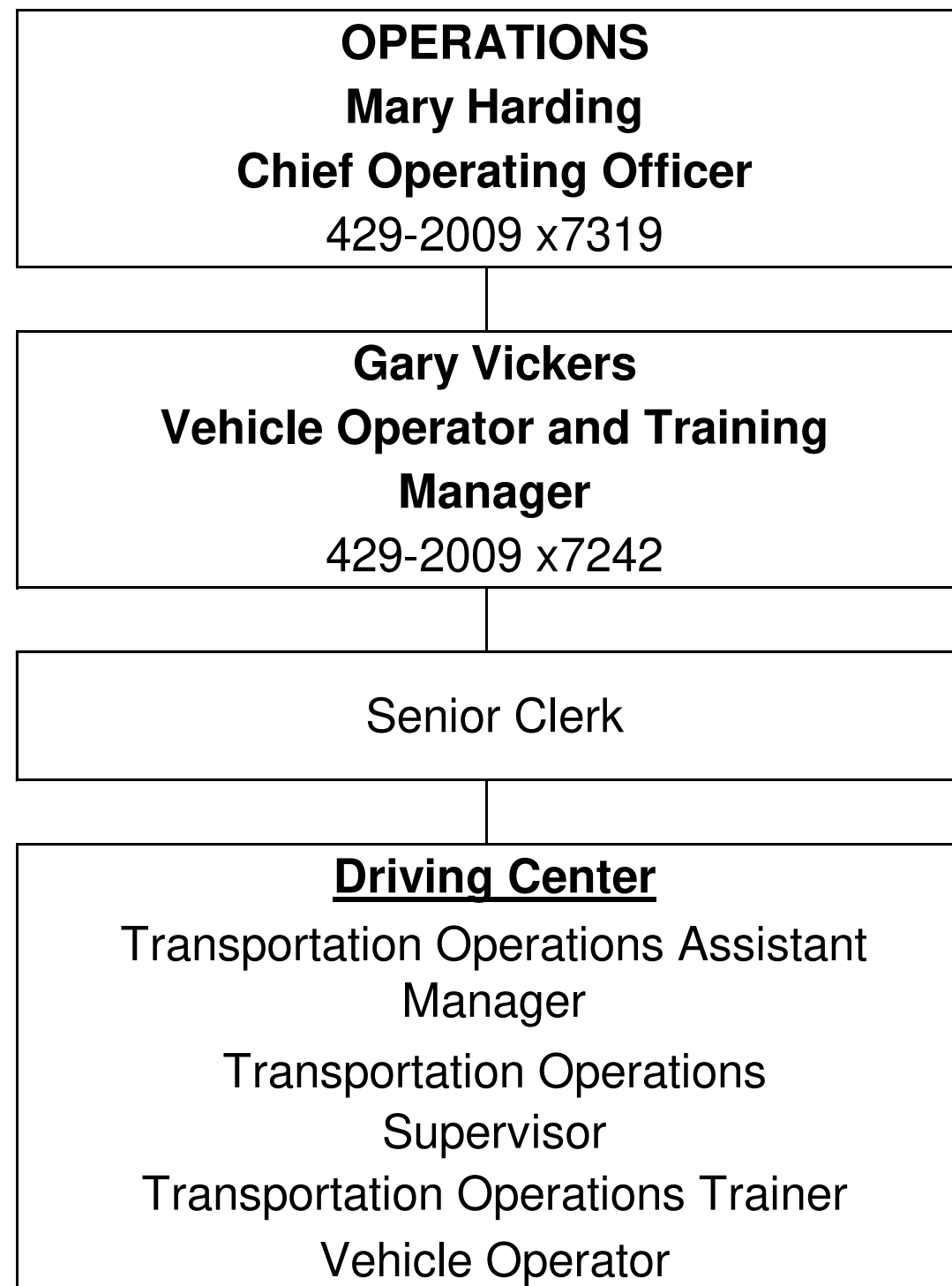
Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### NONPERSONNEL:

Professional Services	
Outside Services	
Rent & Repair	\$13,520
Office Expense	
Interest Expense	
Telephone/Utilities	\$16,177
Tax/License/Dues/Permits	\$6,407
Travel	
Professional Development	
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$36,103</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$1,230,706</b>
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FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART



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## Operations: Driving, Safety and Training Centers

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The Vehicle Operators, Safety and Training Division is responsible for the day to day operations to include training, vehicle safety, training and the supervision of approximately 125 Vehicle Operators. Each supervisor in the Division is responsible for approximately 40 Vehicle Operators. We provide pull-out, pull-in, spot check and formal yearly ride-a-long evaluations for all Operators. Key staff within the Division are certified by the California Department of Motor Vehicles to certify the commercial drive test and administers the test for all vehicle operators. The Division also provides 24 hour on-call response to incidents and/or accidents and investigation services. In addition to the training of our Vehicle Operators, the training staff within the Division provides vehicle and safety training to our 9 CTSA partner agencies on a variety of topics from lift deployment to wheelchair securement to pre-trip inspection.

We are also committed to select, evaluate and train a Team of 2 to 4 Vehicle Operators to compete in the annual CalAct Bus Rodeo which, depending on placement may result in the competition at the National Bus Rodeo.

### Key Projects for Vehicle Operators, Safety and Training for FY 19 are:

**Service:** Continue to provide nationally recognized, customer service focused transportation to passengers in a safe and efficient manner.

**Training:** Continue to modify and adjust our training process to allow Paratransit to onboard drivers more quickly, allowing for more consistent staffing and assisting in the goal to reduce brokered transportation. Assistant Managers will attend TSI Supervisory Course.

**Road Supervision:** Provide one formal ride-along and evaluation for each Vehicle Operator during the fiscal year.

**Uniforms:** Provide up to 125 new lightweight jackets/sweaters to the Driving staff. Introduce a Navy Blue shirt.

### Performance Metrics

FY 18/19:

1. Provide for refresher training for any preventable incident/accident.
2. Provide for at least 1 evaluation per year for all Vehicle Operators.

FY 19/20:

1. Provide for refresher training within 7 days of any preventable incident/accident.
2. Provide for 1 evaluation per year for all Vehicle Operators.
3. Provide for a 6 month real time spot check.
4. Provide for a ride-a-long for Vehicle Operators prior to 1 year anniversary
5. Provide Vehicle Operators 2 hours of in-service training for refresher fire extinguisher training.
6. Provide First Aid/CPR Training to Vehicle Operators and staff as allowed.
7. Send 2 Assistant Managers to DMV ETP Certification Training.
8. 3 Supervisors to attend TSI Advanced Bus Collision Investigation Training.

**Staffing:**

<b>Position</b>	<b>FY 18/19</b>	<b>FY 19/20</b>	<b>Difference</b>
Driver and Training Manager	1	1	0
Driver & Training Assistant Manager	2	2	0
Driver & Training Supervisor	4	4	0
Driver Trainer	3	3	0
Vehicle Operator	120	125	5
Senior Clerk	1	1	0
<b>TOTAL FTEs</b>	<b>131</b>	<b>136</b>	<b>5</b>

## OPERATIONS: DRIVING CENTER

### PERSONNEL:

Direct Personnel	\$5,187,660
Fringe Benefits	\$1,579,859
Workers' Compensation	\$533,092
<b>TOTAL PERSONNEL</b>	<b>\$7,300,611</b>

### FLEET OPERATIONS:

Fuel	\$2,125,033
Insurance	\$1,341,302
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$3,466,335</b>

### NONPERSONNEL:

Professional Services	
Outside Services	
Rent & Repair	\$88,651
Office Expense	
Interest Expense	
Telephone/Utilities	\$106,075
Tax/License/Dues/Permits	\$42,010
Travel	
Professional Development	
Brokered Trans. Services	\$2,927,390
<b>TOTAL NONPERSONNEL</b>	<b>\$3,164,125</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$13,931,071</b>
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## **OPERATIONS: SAFETY AND TRAINING CENTER**

### **PERSONNEL:**

Direct Personnel	\$222,437
Fringe Benefits	\$100,353
Workers' Compensation	\$14,912
<b>TOTAL PERSONNEL</b>	<b>\$337,701</b>

### **FLEET OPERATIONS:**

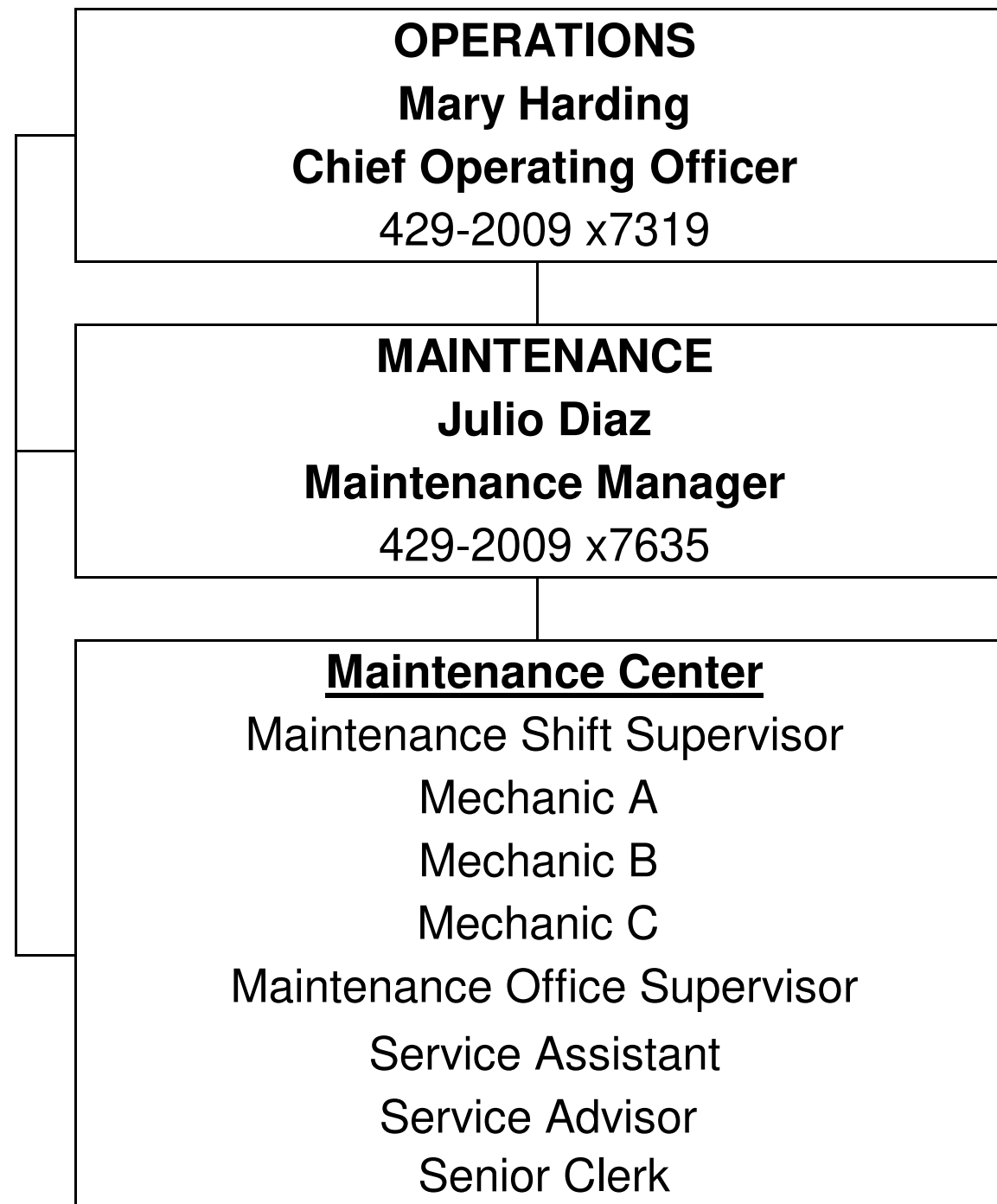
Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### **NONPERSONNEL:**

Professional Services	
Outside Services	
Rent & Repair	\$3,801
Office Expense	
Interest Expense	
Telephone/Utilities	\$4,548
Tax/License/Dues/Permits	\$1,801
Travel	
Professional Development	
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$10,151</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$347,852</b>
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FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART



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## Operations: Maintenance

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Our Department operates base on daily vehicle maintenance schedule, vehicle break downs, and customer request, we also assist Transportation Department to have the most amount of vehicles available for their daily route, assist with road call, assist driver over the phone to trouble shout lift and interlock system, and dispatch the tow truck if needed. Also assisted CTSA partners in similar way.

- Body shop estimates, reviewing estimates and scheduling body shop repairs
- Schedule Dealership warranty, recall and repair work. Review body shop and dealership invoices, and inspect quality of workmanship. Perform quality control on work performed –
- Our current fleet have 187 Vehicles and we performed Preventive safety maintenance every 5,000 miles or 60 days whichever came first. This includes a detail inspection of our units.
- We are projecting to perform around 1200 preventative maintenance services this includes transmission service , wheel bearing service every 30,000 miles and around 23,000 repairs, this project numbers increase whit the new arrival of CNG fleet that requires additional preventive maintenance to the CNG fuel system itself.
- Perform minor and major engine repairs.
- Perform In house minor body work repair, as lower body fender reinforcement and driver door skin reset. This jobs requires minimum paint or none at times.
- Vehicle Body reseal to prevent water from leak inside the bus interior.
- Transmissions minor repairs and overhaul's done in house to reduce cost of replacement of units.
- We maintain our service in compliance by running a variety daily reports, daily updated vehicle mileage and keeping data updated during the day.
- Keep records updated and properly file to comply with CHP, and RT annual vehicle and documentation inspection. As well with Cal Trans. Inspection (every 2 years) also Weekly mileage and PM reports are performed and send to RT.
- Maintenance facility upgrade to a CNG it's completed to be in compliance.
- Our Maintenance Department also perform Taxi inspection to taxi associations every two years as require by City of Sacramento.  
Due to the cities new requirements that started last year, taxi inspections are to be done every other year. Also some of the taxi associations went out of business.
- Taxi inspection and brake and lamp inspections for 2019/2020 are not predictable due to city ordinance changes and unknown fleet sizes at this time.



## **CTSA**

- We follow up with CTSA partner agencies to help them to maintain their service in compliance
- Advise customers via email and by phone monthly on their vehicles due for service  
Based in due date or mileages whichever comes first.
- Assisted agencies scheduling their inspections, write ups and other services needed
- Pickup and delivery vehicles as per CTSA agreement when needed
- Invoices are weekly processed and bill to CTSA agencies for jobs performed
- Update mileages as vehicle come for service or fuel
- We are projecting performing around 200 preventative maintenance services and around 1400 repairs

## **Partner Agencies**

1. Asian Community Center
2. DDSO
3. Elk Grove Adult Community Training
4. Eskaton
5. Health for All
6. Sutter Senior Care I and II
7. St Johns
8. UCP CTSA Shuttle
9. Easter Seals

## **Outside Agencies not CTSA that we perform services and repairs.**

1. A Family Affair
2. Asian Community Center
3. Easter Seals – Increased their fleet this year with new buses.
4. Sutter Senior Care I and II – Increased their fleet this year with new buses.
5. The Commons of Elk Grove
6. UCP
7. Others

## **Projecting Performance for next fiscal year for not CTSA agencies**

- Around 250 preventative maintenance services and 2600 repairs

**Staffing:**

<b>Position</b>	<b>FY 18/19</b>	<b>FY19/20</b>	<b>Difference</b>
Maintenance Department Manager	1	1	
Shift Supervisor	2	2	
Maintenance Office Supervisor	1	1	
Service Adviser	1	1	
Inventory Control Clerk	1	1	
Senior Clerk	1	1	
Mechanic A	6	6	
Mechanic B	2	2	
Mechanic C	3	4	+1
Maintenance Service Assistant	1	1	
<b>TOTAL FTEs</b>	<b>19</b>	<b>20</b>	

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## Operations: Service Assistants

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Service Assistants are responsible for fueling the buses, checking the fluid levels at the time of fueling, cleaning the buses in the inside, along with staging the buses for the early morning drivers. Monday thru Friday we have staff available from 4:15 to 23:00. Weekends the fuel station staffed with only one fueler from 5:00 to 14:00 and one staff from 14:00 to 23:00.

### Key Projects for Service Assistants for FY 19/20 are:

**CNG Fueling:** All service assistants trained to fuel CNG vehicles in September 2019.

**Washing Vehicles:** Service Assistants will continue to assist the bus washing of buses to ensure Paratransit remains in compliance with the required the Stormwater Regulations of the State Water Board.

**Vehicle Licensing:** Deploy a program for the Spanish-speaking service assistants to obtain their Class B license. This includes the required classroom and behind the wheel training.

### Performance Metrics:

FY 18-19:

1. In the first 9 months, 1,727 buses cleaned, averaging 191.89 per month. Less than last FY 17-18 by 353 due to staff leaving for other opportunities outside Paratransit.
2. In the first 9 months, 21,857 buses fueled, averaging 2428.56 per month excluding CNG buses fueled.
3. Hired two FT Service Assistants, along with one PT Service Assistant.

FY 19-20:

1. Continue to monitor the number of buses fueled.
2. Continue to monitor the number of buses cleaned. Keeping up the level of cleanliness that has been observed by both drivers and passengers.

### Staffing

Position	FY 18-19	FY 19-20	Difference
Service Assistant FT	6	6	0
Service Assistant PT	3	3	0
<b>TOTAL FTEs</b>	<b>9</b>	<b>9</b>	<b>0</b>

## Operations: Day Porters

---

The Day Porters primary task is to keep the facility clean by vacuuming, dusting, taking the garbage out, washing floors, etc.

### 1. FY18-19

Objective is to exceed the norm of cleanliness of the facility now. Set up for meetings in the auditorium for C-Levels and Management.

- i. When necessary I will have the one-day porter cross over to be service assistant when needed.
- ii. Offices dusted and washed down on a regular basis.
- iii. Windows cleaned on regular intervals.
- iv. Both day porters complete a daily task check-off list, weekly check-off list, and monthly check-off list. This will help monitor productivity and the cleanliness of the building.
- v. Carpets cleaned bi-annually

### 2. FY 19-20

- i. Day porter will no longer cross over to service assistant when needed.
- ii. Objectives is to continue to meet objectives from previous FY

## Staffing

Position	FY 17-18	FY 18-19	Difference
Day Porters	2	2	0
<b>TOTAL FTEs</b>	<b>2</b>	<b>2</b>	<b>0</b>

## **OPERATIONS: MAINTENANCE**

### **PERSONNEL:**

Direct Personnel	\$1,251,480
Fringe Benefits	\$730,153
Workers' Compensation	\$54,238
<b>TOTAL PERSONNEL</b>	<b>\$2,035,872</b>

### **FLEET OPERATIONS:**

Fuel	
Insurance	\$5,505
Cost of Parts & Sublet Service	\$742,105
<b>TOTAL FLEET OPERATIONS</b>	<b>\$747,610</b>

### **NONPERSONNEL:**

Professional Services	
Outside Services	
Rent & Repair	\$21,386
Office Expense	
Interest Expense	
Telephone/Utilities	\$25,590
Tax/License/Dues/Permits	\$10,135
Travel	
Professional Development	
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$57,110</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$2,840,592</b>
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FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART

**OPERATIONS**  
**Mary Harding**  
**Chief Operating Officer**  
429-2009 x7319

**Call Center**  
Transportation Operations Assistant  
Manager  
Call Center Supervisor  
Quality Control Professional  
Reservationist

**Scheduling Center**  
Transportation Operations Assistant  
Transportation Operations Specialist  
Transportation Technology Specialist  
Transportation Scheduler

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## Operations: Call Center

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The Call Center is open 365 days a year from 8:00 a.m. to 5:00 p.m. Reservationists are responsible for taking calls in a courteous and professional manner. Their duties include booking trip requests, taking cancellations, client file updates and address changes, answering “where’s my bus” calls , and are the front line for any other calls that come into the queue. The Call Center Supervisor uses information pulled from Bright Metrics and Telestrat to produce monthly reports for each individual’s performance in the call center. She meets with each staff person to review their performance metrics including attendance, tardies, call counts, average talk time, forced releases, customer service commendations and complaints, total idle time, total release time, number of trips booked,etc.

### Key Goals for FY 19/20:

1. Implement PASS/WEB online booking
2. Monitor the metrics involved in overseeing this division using Shoreware, Telestrat, and Bright Metrics.
  - a. Analyze and Evaluate call volume
  - b. Analyze and Evaluate hold times, call length times.
3. Continue to provide refresher training for staff on how to make the best choices when booking rides using Trapeze software that produce more efficient ride shares, routes, etc.
4. Continue to evaluate ways to reduce the call length for ride reservations while maintaining accurate trip data entry.
5. Continue to provide excellent customer service.

### Performance Metrics:

1. Continue to manage an increase in calls with a reduction in staffing resulting in more calls per person per day
2. Maintain the reduction in the average call length per reservation
3. Implement On-Line Reservations and encourage use of this feature with our passengers and group clients

### Staffing:

Position	FY 18/19	FY 19/20	Difference
Chief Operating Officer	1	1	
Call Center Supervisor	1	1	
Senior Reservationist	4.5	2	-2.5
Reservationist	8	11	
<b>TOTAL FTEs</b>	<b>14.5</b>	<b>15</b>	<b>+.5</b>

## Operations: Scheduling and Technology Centers

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Responsible for proofreading and editing routes to create effective, efficient schedules each day under extreme time constraints using Trapeze software. Creates and maintains template routes/schedules and daily routes/schedules, update and maintain daily driver assignments, adjusting and editing routes for drivers time off for sick leave, vacation, floating holidays, leaves governed by law, jury duty, FMLA, workers comp appointments, etc. Ensures route start/end times, breaks, lunches, out of services, etc. conform to the CBA contract between Paratransit, Inc. and the Amalgamated Transit Union. Maintains driver overtime list, prepares, creates, and oversees the driver vacation and shift bid process every four months. Creates and maintains the Trapeze test environment to ensure that we utilize the software in the most efficient and effective way possible.

### Key Goals for FY 19/20:

1. Test and manipulate settings in the Trapeze version 17 software to further increase productivity and efficiency.
2. Continue to look for ways to improve our trips per hour which are currently around 2.0 towards a long term goal of 2.2.
3. Work to maintain the reduction in same day rides and minimize the number of taxi cab trips by squeezing as much time out of a route as possible.

### Performance Metrics:

1. Further analyze the total number of trips requested/performed, cancellations, Yellow Cabs, ACC trips, UCP trips, Non-ADA trips each day and continue to look for patterns and ways that can help in reducing costs and increase productivity.
2. Look to staff for their continued creativity in finding ways to improve the way we utilize our software that will result in reduced costs and increased efficiencies.

### Staffing:

Position	FY 18/19	FY 19/20	Difference
Transportation Scheduler	2	2	
Transportation Technology Specialist	2	2	
<b>TOTAL FTEs</b>	<b>4</b>	<b>4</b>	<b>0</b>



**OPERATIONS: CALL, SCHEDULING AND  
TECHNOLOGY CENTERS**

**PERSONNEL:**

Direct Personnel	\$723,112
Fringe Benefits	\$434,775
Workers' Compensation	\$4,905
<b>TOTAL PERSONNEL</b>	<b>\$1,162,791</b>

**FLEET OPERATIONS:**

Fuel	
Insurance	
Cost of Parts & Sublet Service	
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

**NONPERSONNEL:**

Professional Services	
Outside Services	
Rent & Repair	\$12,357
Office Expense	
Interest Expense	
Telephone/Utilities	\$14,786
Tax/License/Dues/Permits	\$5,856
Travel	
Professional Development	
Brokered Trans. Services	
<b>TOTAL NONPERSONNEL</b>	<b>\$32,999</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$1,195,790</b>
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## Operations: Facilities Management

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The facility technician is responsible for monitoring the ticket system for issues or repairs of the facility. Completing necessary inspections throughout the facility, along with the generator and fuel station. Submitting government forms that are required by the various agencies. Overseeing vendors on-site. Working closely with managers and Human Resources on Ergonomic Work Station Evaluations.

FY 18-19

1. Did not fill this position as stated in the previous FY.
2. We continue to be at Risk I with the State Water Board due to not enough rain within the first 6-month of the FY.

FY 19-20

1. Will not be hiring for this position this FY.

## Staffing

<b>Position</b>	<b>FY 18-19</b>	<b>FY 19-20</b>	<b>Difference</b>
Facilities Maintenance Technician	0	0	0
<b>TOTAL FTEs</b>	<b>0</b>	<b>0</b>	<b>0</b>

## DESTINATIONS MOBILITY RENTALS

### PERSONNEL:

Direct Personnel	\$0
Indirect Personnel	\$0
Fringe Benefits	\$0
Indirect Fringe Benefits	\$0
Workers' Compensation	\$0
Indirect Workers' Compensation	\$0
<b>TOTAL PERSONNEL</b>	<b>\$0</b>

### FLEET OPERATIONS:

Fuel	\$382
Insurance	\$13,126
Cost of Parts & Sublet Service	\$2,059
<b>TOTAL FLEET OPERATIONS</b>	<b>\$15,567</b>

### NONPERSONNEL:

Professional Services	\$3,006
Outside Services	\$329
Rent & Repair	\$5,710
Office Expense	\$0
Interest Expense	\$0
Telephone/Utilities	\$706
Tax/License/Dues/Permits	\$376
Travel	\$0
Professional Development	\$0
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$10,127</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$25,694</b>
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## CTSA Partners: What They Do and Who They Serve in our Community



Easter Seals offers help, hope and answers to children and adults with disabilities and their families in the United States and Australia, and through our global partners in Puerto Rico, Canada and Mexico. We are the leading non-profit provider of services for individuals with autism, developmental disabilities, physical and mental disabilities, and other special needs. Easter

Seals also provides critical community-based supports and services to military service members, veterans, their families and families of the fallen.

### Health for All

Health for All is a non-profit organization designed to help frail elderly stay independent or restore and maintain optimal functioning capacity. The Adult Day Health Care Centers offer multi-disciplinary teams of professional service providers who conduct comprehensive assessments of each of the participant's health and social needs.



United Cerebral Palsy provide services such as housing, physical therapy, assistive technology training, early intervention services, individual and family support, social and recreational programs, community living, state and local referrals, employment, employment assistance and advocacy



Developmental  
Disabilities  
Service  
Organization

From two sites in Sacramento and one site in Stockton, Developmental Disabilities Service Organization is an award-winning nonprofit that annually provides 400 adults with disabilities the opportunity to experience independence, job training, employment, physical education, visual and performing arts, life skill building, social interaction, active participation in the community, nurturing relationships and more



Sutter Senior Care PACE is a non-profit health plan exclusively for frail older adults. Sutter Senior Care's model of care is known as the "Program of All-Inclusive Care for the Elderly" or PACE. The PACE model has been recognized as the most appropriate model of comprehensive care for the frail elderly population.



The mission of the Elk Grove Adult Community Training program is to provide for the equality, dignity, and fulfillment of rights of all program participants through a community based program providing opportunities for individual choice in community and employment environments

Elk Grove Adult Community Training, Inc. (EGACT) is a non-profit organization that provides education and training for adults with developmental disabilities.



Saint John's is for the woman who wants to make the leap. Who will fight the pervasive influence of homelessness, poverty, and abuse. Who will make an empowered decision to rise up and become a productive community member. Who understands, unequivocally, that the decision to create a better life – for herself and for her family – rests entirely on her.



ACC promotes the general welfare and enhances the quality of life of older adults by providing a comprehensive array of culturally appropriate health and social services. ACC owns and operates ACC Care Center, a 99-bed skilled nursing facility, ACC Greenhaven Terrace, a 146 apartment independent living and 27 apartment assisted living apartments, ACC Programs, where ACC Rides provides 4,000 one-way rides each month in Sacramento County, and Meals on Wheels by ACC, the Sacramento home delivered and congregate meal program for seniors.



Eskaton offers the options needed to lead an independent lifestyle along with the convenience and assurance of support, if needed. Residents appreciate a full complement of hospitality-style amenities, housekeeping and transportation services.

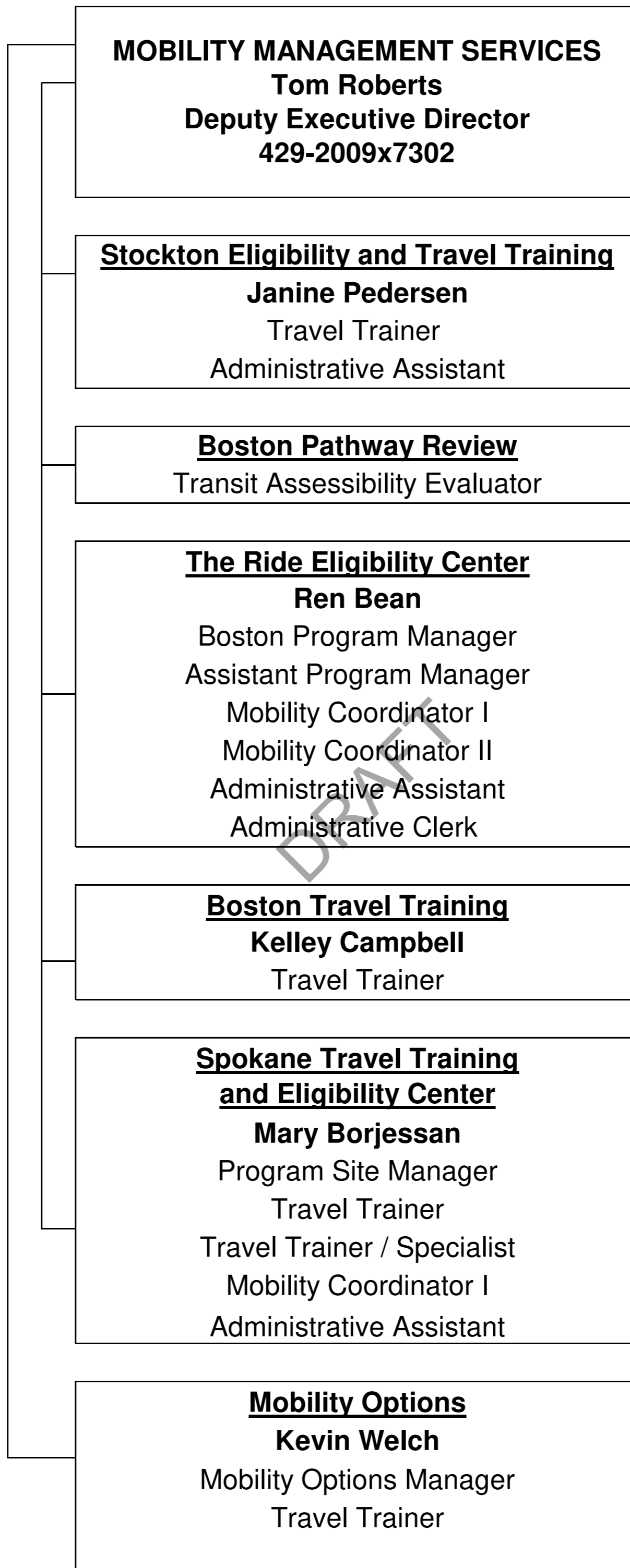
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# Mobility Management Services

Boston Eligibility  
Boston Pathway Review  
Boston Travel Training  
Spokane Eligibility and Travel  
Training Stockton Mobility  
Management Sacramento Mobility  
Options Mobility Management Special  
Projects

FY 2019/20  
PARATRANSIT, INC. ORGANIZATIONAL CHART



## Mobility Management Services: Boston Eligibility- TREC

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Paratransit, Inc. has been operating THE RIDE Eligibility Center (TREC) under contract for the Massachusetts Bay Transportation Authority (MBTA) since December 2012 when the MBTA discontinued using a paper- based process. The base contract period was 4 years and MBTA extended through June 2018. In March 2018, Paratransit successfully re-bid the TREC contract to operate another 4 years.

The key projects for FY 20 are:

**Eligibility Process:** The eligibility process is conducted in-person and includes functional assessments in accordance with nationally recognized standards originally established by Easter Seals Project ACTION. Services provided to the MBTA associated with this contract include:

Operating a busy call center.

Scheduling eligibility interview appointments and coordinating transportation with the MBTA's paratransit vendors.

Conducting in-person interviews and functional assessments to determine ADA paratransit eligibility.

Making determinations of ADA paratransit eligibility in a timely manner (current average is 3 days from date of completed application).

In addition to fulfilling requirements of the eligibility contract, staff works closely with MBTA on various mobility management projects such as travel training, customer education, and providing discount passes on fixed route.

Launch of pathway review program to check accessibility of fixed route trips for conditionally eligible customers.

<b>PERFORMANCE METRICS</b>	<b>FY 2017/18</b>	<b>FY 2018/19</b>
Number of ADA Eligibility Determinations	12,766	12,800
Average Number of Days to Process Applications	2	3
Number of Referrals to Travel Training	155	370

<b>STAFFING</b>	<b>FY 2017/18</b>	<b>FY 2018/19</b>
Program Manager	1	1
Assistant Manager	1	1
Mobility Coordinator I	7	6
Mobility Coordinator II	1	1
Administrative Assistant	6	7



## BOSTON ELIGIBILITY

### PERSONNEL:

Direct Personnel	\$619,795
Fringe Benefits	\$276,124
Workers' Compensation	\$3,101
<b>TOTAL PERSONNEL</b>	<b>\$899,020</b>

### FLEET OPERATIONS:

Fuel	\$0
Insurance	\$48,206
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$48,206</b>

### NONPERSONNEL:

Professional Services	\$1,942
Outside Services	\$117,773
Rent & Repair	\$2,500
Office Expense	\$33,351
Interest Expense	\$2
Telephone/Utilities	\$38,279
Tax/License/Dues/Permits	\$5,156
Travel	\$3,500
Professional Development	\$1,651
Network and Telecommunications	\$6,744
<b>TOTAL NONPERSONNEL</b>	<b>\$210,898</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$1,158,124</b>
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## Mobility Management Services: Boston Pathway Review

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In the winter of 2018, Massachusetts Bay Transportation Authority (MBTA) exercised the right to use an optional services that is in the current ADA Eligibility contract. Paratransit Inc. will provide a Pathway Review process for conditional eligibility for Massachusetts Bay Transportation Authority (MBTA). This process has been very successful, efficient and effective in other locations to enforce trip by-trip conditional eligibility.

The program commenced in April 2019, with one Transit Accessibility Evaluator. The program will be managed by the Boston Travel Training Program Manager. There is the potential to add an additional employee to the program if the number of Pathway Reviews and conditional eligibility increase.

The program is based out of the ADA Eligibility Office in Boston. The majority of the employee's times is spent in the community conducting route and scout activities. Using Paratransit Inc.'s Data Management System (DMS) and iPads, a Transit Accessibility Evaluator assesses the path of travel for a rider with a barrier condition for ADA paratransit eligibility. Once the assessment is completed, Paratransit Inc. notifies the applicant, in writing, if a trip is not eligible to be taken on paratransit. The Transit Accessibility Evaluator works with applicants to ensure transportation options are available, including immediate Travel Training.

The key projects for FY 2020:

Assess trips on public transportation for barriers that could prevent customers with disabilities from utilizing public transportation for that trip.

Travel the path from the origin to transit stop, any transfer paths, and from transit stop to destination.

Evaluates routes and pathways using software such as Google Maps to check for measurable barriers (i.e. distance using the Measure Distance feature).

<b>STAFF</b>	<b>FY 2020</b>
Program Manager	1
Transit Accessibility Evaluator	1

## Mobility Management Services: Boston Travel Training

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In the spring of 2016, Massachusetts Bay Transportation Authority (MBTA) released an RFP for Travel Training services. As the operator of the ADA paratransit eligibility services provided there we submitted a proposal in response to the RFP and were selected as the winning bidder by the MBTA.

The program commenced in September 2016 with two employees and in the Spring of 2017, an additional employee joined the team, bringing the total number of staff to three. We will remain at three employees for FY 20.

The program is based out of the ADA Eligibility Office in Boston. The majority of their time is spent in the community conducting various activities.

The key projects for FY 20 are:

**Outreach:** Staff is responsible for informing the community of services available under this contract. This is done by attending resource fairs, distributing marketing materials, or conducting presentations to groups at schools, community centers, senior centers, and more.

**System Orientation Training:** System Orientation is a one-time class with a maximum of 15 participants conducted in the MBTA's modern training facility near Broadway on the Red Line. The class can also be held at alternative locations such as schools or senior centers upon request. The training is designed to familiarize participants with the MBTA's fixed-route network of buses and subways, and other system features. Two types of System Orientation are available and designed specifically for seniors and customers with disabilities generally, and customers who are blind or have low vision.

**One-on-One Intensive Training:** Individual Travel Training is one-on-one instruction on the safe use of public transit for one's select destination within the MBTA service area. Training plans are customized for the unique needs of the individual.

Travel Training staff will meet participants at their homes and show them how to get to and from select destinations safely. Travel trainers work with each participant's schedule and go at their own personal pace. They ride along on actual trips.

Marketing/Outreach is designed to provide the community with services tailored to the unique needs of the disability population. This is done with curriculum development, required trainings in the community, marketing, advertising and social media.

<b>PERFORMANCE MEASURES</b>	<b>FY 19</b>	<b>FY 20</b>
System Orientation	45	70
Outreach	60	82
1:1 Trainings	70	100
Marketing/Outreach	275	178

<b>STAFF</b>	<b>FY 19</b>	<b>FY 20</b>
Program Manager	1	1
Travel Trainer	2	2

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## BOSTON TRAVEL TRAINING

### PERSONNEL:

Direct Personnel	\$143,917
Fringe Benefits	\$68,640
Workers' Compensation	\$746
<b>TOTAL PERSONNEL</b>	<b>\$213,303</b>

### FLEET OPERATIONS:

Fuel	\$0
Insurance	\$0
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### NONPERSONNEL:

Professional Services	\$150
Outside Services	\$0
Rent & Repair	\$0
Office Expense	\$100
Interest Expense	\$0
Telephone/Utilities	\$0
Tax/License/Dues/Permits	\$51
Travel	\$4,000
Professional Development	\$225
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$4,526</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$217,829</b>
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## **Mobility Management Services: Mobility Options Sacramento Travel Training**

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The core service of the Mobility Options Department is our Travel Training Program. Since 1982 Paratransit has been providing one on one and small group trainings in the safe and effective use of fixed route public transit. To date, over 15 thousand people with disabilities, seniors, low income, homeless, and those individual's with limited English proficiency, have successfully completed training. This service has resulted in millions of dollars in savings or cost avoidance to our local fixed route transit providers.

In September of 2018, we entered the third year of our contract with The City of Roseville to provide travel training and "Learn to Ride the Bus" workshops for the City Parks and Recreation Department. These classes take place 4 times per year, on a weekly bases, for three consecutive weeks. These classes and have generated referrals for additional one on one training for those that would like to experience more routes or to venture out using other transit options. All evaluation on the class from the participants have been extremely positive.

This Department is also responsible for the majority of our outreach to the community participating in dozens of health/resource fairs, presentations to service organization, support groups, schools, and senior living facilities. These events allow us the opportunity to provide vital information on transit options and to answer question and address misconceptions of the Paratransit eligibility requirements as well as provide referrals for our travel-training program. Staff also offers "Train the Trainer" workshops across the United States. The workshops offer a 3-5 day classroom and field experience to give agencies and transit districts the basic knowledge to institute a travel training program in their community. This training is on a fee for service basis under an MOU agreement.

### **Roseville contract:**

We continue to provide a high quality of service to insure the option of year 4 of a possible 5-year contract to provide travel training to individuals in the Placer County region. Prior to our providing service, Roseville relied on a travel Ambassador Program and Bus Buddies. After the first year of our contact, Roseville has drastically reduced the other programs and found that our travel trainers have delivered a much more in depth approach to accessing public transit in a safe and effective program. As of February 2019, Roseville has now agreed to pay Paratransit the current hourly rate to teach the "Learn to Ride the Bus" Class generating additional revenue for the program.

## Yolo Proposal:

Staff in Sacramento's Mobility Options Department is willing to provide whatever assistance necessary to insure the success of the Yolo Travel Training program when Paratransit is called upon to begin the program start up

## Mobility Training:

Sacramento's Travel Training program will continue its 37-year tradition of providing travel training and mobility options to those needing services in the six county region. The Mobility Options Department continues to broaden our service delivery to not only include seniors and those Individuals with disabilities, but to those recently arriving in the United States with limited English proficiencies, the LGBT community, those of low income and transit dependency, and students transitioning from school to independent living and job placement opportunities. We deliver our training in a one-on-one setting, small groups of up to five individuals, or field trips for those clubs or organization wishing to have an "introduction to public transit" experience. Those completing the introduction field trip are then offered Individual "person centered" training to anyone that may be interested in specific routes or services that may assist them with their transportation needs

Performance Measures	FY 2018/2019	FY 2019/20
<b>Sacramento</b>		
Projected Successful Trainings	135	200
<b>Outreach</b>		
Outreach to date (4/1/19)	32	N/A
Projected outreach	40	40
<b>Roseville</b>		
Successful Trainings to date (4/1/19)	20	N/A
Projected training	24	24
Learn to Ride the Bus Class	4	4
<b>Group Training</b>		
Group trainings to date (4/1/19)	5	N/A
Group Trainings Projected	6	8
<b>Train the Trainer Workshop</b>		
	1	2

Department Staffing	FY 2018/2019	FY 2019/2020
Program Manager/ Workshop Trainer	1	1
In Field Travel Trainers	2	2

## SACRAMENTO TRAVEL TRAINING

### PERSONNEL:

Direct Personnel	\$183,177
Fringe Benefits	\$104,971
Workers' Compensation	\$1,387
<b>TOTAL PERSONNEL</b>	<b>\$289,535</b>

### FLEET OPERATIONS:

Fuel	\$0
Insurance	\$1,295
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$1,295</b>

### NONPERSONNEL:

Professional Services	\$7,708
Outside Services	\$1,574
Rent & Repair	\$1,633
Office Expense	\$2,021
Interest Expense	\$935
Telephone/Utilities	\$6,747
Tax/License/Dues/Permits	\$818
Travel	\$23,871
Professional Development	\$1,447
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$46,754</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$337,584</b>
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## Mobility Management Services: Spokane Mobility Center

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Paratransit Inc. has worked in partnership with Spokane Transit since 2006, providing Mobility Training services to the community of Spokane. In October of 2012, the Spokane Transit Mobility Center opened its doors for In-Person Assessments for ADA Paratransit Eligibility. In addition to In-Person Assessments, Paratransit, Inc. has designed a pathway review process for ADA conditional eligibility. In January of 2016, the Spokane Transit Mobility Center expanded with the addition of the Volunteer Mobility Mentor Program.

The key projects for FY 20 are:

**Mobility Training Program:** Paid, PI Mobility Trainers help seniors and persons with disabilities gain more independence by teaching people how to successfully ride fixed route transit.

**One-on-One Training:** Trainers work one-on-one with a trainee and tailor the trainings to the individual's needs. The goal is to ensure that the trainee has a positive experience and is able to become an independent fixed route rider.

**Group Training:** Mobility Trainers work with groups of up to five people. The goal is to teach a small group of trainees how to successfully ride fixed route. This is particularly well suited for classes of students.

**High School/Transition Training Class:** Paratransit Inc. has created an in-classroom curriculum for special education students in Spokane high schools and transition programs. By going into the classrooms, the Mobility Trainers are able to train more individuals than could be accounted for in one-on-one training. Subsequently there has been a decrease in ADA paratransit applications from high schools and transition programs.

**In-Person Assessments:** The process to determine ADA paratransit eligibility starts with a paper application. The Eligibility Specialist for Spokane Transit reviews the applications and refers about 50% of those applications to Paratransit Inc. for In-Person assessments. Once the application goes to PI we begin the process of contacting the applicant to schedule their assessment and transportation. The assessment starts with an interview that allows the applicant to describe their disabilities and abilities and how these affect their ability to travel independently on the fixed route. Depending on responses to the

interview questions and observations, the applicant may be asked to participate in a Tinetti Gait and Balance Assessment and/or a Transit Skills Assessment (one-half mile timed/measured simulated trip to a transit stop). Other assessments that may be utilized are a FACTS Test or a Mini-Mental State Examination.

Pathway Review: Mobility Trainers use iPads to assess the path of travel for an applicant with a barrier condition for ADA paratransit eligibility, when requested by Spokane Transit. This process allows Spokane Transit to enforce trip-by-trip conditional eligibility. Paratransit Inc. will notify the customer in writing once the assessment has been completed if the trip does not meet the barrier condition and is no longer eligible on paratransit.

Volunteer Mobility Mentor Program: Volunteer Mentors provide support for people who are not familiar with the bus system and are apprehensive about learning to ride the bus on their own. This program concentrates on the senior population.

One-on-One: Volunteer Mobility Mentors assist customers one-on-one to/from their destination depending on need. Different from the Mobility Training program, this program has the ability to provide long-term support to customers.

Travel Clubs: Volunteer Mobility Mentors take groups of seniors on pre-planned outings in the community. Travel Clubs teach seniors how to ride the bus but do so while having fun with their peers on these “Adult Field Trips”.

<b>PERFORMANCE MEASURES</b>	<b>FY 2018-19</b>	<b>FY 2019-20</b>
Total number of successful Mobility Trainings	206	206
Average Conditional percentage	20%	20%
Average days to process determination	6	6
Number of Active Mobility Mentors per month	19	23
Total Mobility Mentor Participants	162	166

<b>STAFF</b>	<b>FY 2018-19</b>	<b>FY 2019-20</b>
Program Manager	1	1
Travel Trainer	3	3
Mobility Coordinator	1	1
Program Coordinator	1	1
Administrative Assistant	1	1

## **SPOKANE ELIGIBILITY AND TRAVEL TRAINING**

### **PERSONNEL:**

Personnel	\$236,763
Fringe Benefits	\$159,992
Workers' Compensation	\$4,851
<b>TOTAL PERSONNEL</b>	<b>\$401,606</b>

### **FLEET OPERATIONS:**

Fuel	\$0
Insurance	\$0
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

### **NONPERSONNEL:**

Professional Services	\$1,146
Outside Services	\$146
Rent & Repair	\$1,764
Office Expense	\$2,359
Interest Expense	\$69
Telephone/Utilities	\$4,395
Tax/License/Dues/Permits	\$9,586
Travel	\$3,679
Professional Development	\$1,315
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$24,459</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$426,065</b>
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## Mobility Management Services: Stockton Eligibility and Travel Training

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Since October 2016, Paratransit, Inc. has operated the Americans with Disabilities Act (ADA) paratransit eligibility program for the San Joaquin Regional Transit District (RTD) in Stockton. The agency was hired to implement an in-person interview and functional assessment process to replace the paper application previously used by RTD.

RTD is a smaller transit agency than Paratransit, Inc.'s clients in Boston or Spokane. However, in the late Fall of 2018, the eligibility program was expanded to include assessments in the cities of Escalon, Lodi, Manteca and Tracy. In addition, countywide travel training services have also been added. This expanded the staffing of our office in the Stockton Transit Center to three (1 Mobility Coordinator, 1 Travel Trainer, 1 Admin).

The key projects for FY 20 include:

**In-Person ADA Eligibility:** Conduct in-person interviews and transit skills functional assessment to determine ADA paratransit eligibility in compliance with FTA and ADA guidance completing eligibility determinations accurately within the 21-day timeline required by the ADA.

**Travel Training:** Older Adults and/or persons with disabilities receive group and individual training on how to ride RTD and local transit systems.

**Outreach Events:** Conduct outreach activities to promote Travel Training.

Assisting applicants and community members as needed.

<b>PERFORMANCE METRICS</b>	<b>FY 2018/19</b>	<b>FY 2019/20</b>
Number of ADA Eligibility Determinations	725	725
Average Number of Days to Process Applications	5	5
Outreach: attend resource fairs, give presentations	8	12
Successful group trainings	5	10
Successful individual trainings	20	60

<b>STAFFING</b>	<b>FY 2018/19</b>	<b>FY 2019/20</b>
Program Coordinator	1	1
Administrative Assistant	1	1
Travel Trainer	1	1

**STOCKTON ELIGIBILITY AND  
TRAINING**

**TRAVEL**

**PERSONNEL:**

Direct Personnel	\$118,387
Fringe Benefits	\$46,796
Workers' Compensation	\$918
<b>TOTAL PERSONNEL</b>	<b>\$166,101</b>

**FLEET OPERATIONS:**

Fuel	\$0
Insurance	\$0
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$0</b>

**NONPERSONNEL:**

Professional Services	\$1,264
Outside Services	\$6,388
Rent & Repair	\$0
Office Expense	\$7,787
Interest Expense	\$0
Telephone/Utilities	\$4,213
Tax/License/Dues/Permits	\$433
Travel	\$3,593
Professional Development	\$343
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$24,021</b>

<b>TOTAL OPERATING EXPENSE</b>	<b>\$190,122</b>
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## Mobility Management Services: Administration

Mobility Management Administration represents the management resources dedicated directly to corporate oversight and support of our field offices, Sacramento's Travel Training program and new start-ups and special projects within the Mobility Management Division. This includes general guidance regarding program management, start-up services, and other planning and administrative support. In addition, maintaining client relationships and contract negotiations are included in this budget area as well as occasional consulting services.

The expenses associated with the Administration account include the wages of the staff above what is directly billed to a field office or stand-alone consulting contracts, as well as other administrative support and business development costs such as travel, printing, supplies and materials and trainings/conferences.

### The key projects for FY 20 are:

**DMS Upgrades:** The department uses a sophisticated DMS (Data Management System) which is a 360 degree eligibility solution. Upgrades will be made in the system as well transition the application to a web based platform.

**Beta Test Site:** The agency seeks to identify an appropriate partner(s) to test a new model of the DMS.

### Performance Metrics

	FY 18/19	FY 19/20
Field staff management training workshops	1	1
Site visits to field offices	9	7

### Staffing

Position	FY 18/19	FY 19/20	Difference
<b>Mobility Management Special Projects</b>			
Deputy Executive Director	.75	.75	0
<b>TOTAL FTEs</b>	<b>.75</b>	<b>.75</b>	<b>0</b>

## MOBILITY MANAGEMENT ADMINISTRATION

### PERSONNEL:

Direct Personnel	\$0
Indirect Personnel	\$0
Fringe Benefits	\$0
Indirect Fringe Benefits	\$0
Workers' Compensation	\$0
Indirect Workers' Compensation	\$0
<b>TOTAL PERSONNEL</b>	<b>\$0</b>

### FLEET OPERATIONS:

Fuel	\$0
Insurance	\$8,328
Cost of Parts & Sublet Service	\$0
<b>TOTAL FLEET OPERATIONS</b>	<b>\$8,328</b>

### NONPERSONNEL:

Professional Services	\$0
Outside Services	\$0
Rent & Repair	\$0
Office Expense	\$0
Interest Expense	\$0
Telephone/Utilities	\$0
Tax/License/Dues/Permits	\$2,436
Travel	\$176
Professional Development	\$14,422
Brokered Trans. Services	\$0
<b>TOTAL NONPERSONNEL</b>	<b>\$17,034</b>

**TOTAL OPERATING EXPENSE** **\$25,362**