Ventura County Demand-Response Integration Plan

Integration Principals, Governance, and Implementation Phases

Prepared for:

Ventura County Transportation Commission

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VENTURA COUNTY DEMAND-RESPONSE INTEGRATION PLAN

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This chapter of Ventura County's Short Range Transit Plan (SRTP) addresses the integration of the County's demand-response services as directed by Ventura County Transportation Commission. The Commission's action was the adoption of integration recommendations set forth in the Transit Integration and Efficiency Study (TIES 2023) to integrate the County's nine demand-response programs, which is outlined in Alternative #2 of the TIES study. Integration was nominally defined as operating demand-response services countywide. Integration of services is desirable for reasons of improving customer experience and controlling escalating costs.

A plan for such integration is introduced in this chapter through three sub-sections: (1) functional improvements by which all demand-response agencies can proceed to ensure integration is successful, (2) a governance framework to make integration possible in the near- and long-term and (3) identified phases for how integration would occur over a period of two-to-three years. A later chapter discusses costs, benefits, and provides further implementation detail.

Current Assessments

BASIC STIPULATIONS

Integration of demand-response services must maintain the following stipulations to succeed in Ventura County, as well as to ensure continued compliance with the applicable State and the Federal Transit Administration (FTA) regulations.

- Maintain compliance with the Americans with Disabilities Act (1990) and its complementary paratransit rules, ensuring that this civil right of eligible riders is upheld.
- Align with the Commission's goal, adopted through the Transit Integration & Efficiency Study (TIES), to improve intercity demand-response travel.
- Support the TIES "Alternative 2" objective of integrating demand-response services.
- Improve the rider experience, with particular attention to individuals who must transfer or travel long distances.
- Provide a community-level mix of public transportation services that best meets local mobility needs without internal competition.
- Increase the return on public investment in demand-response services by improving performance and cost-effectiveness.

Demand-response systems go by various terms and in Ventura County encompass:

- Americans with Disabilities Act (ADA) Paratransit – *eligible and certified riders*
- Senior transportation demand-response – *rides for individuals age 65 and older*
- Microtransit – *ability to reserve a ride in real-time through an app within a given service area with rides usually for the general public*

The focus of this integration discussion will be on the County's ADA paratransit services and senior transportation, which all cities currently provide. There are references within this chapter to microtransit on-demand services, where topics such as their dispatching systems and call centers overlap with the integration of demand-response, demand-response programs.

CURRENT ASSESSMENT OF DEMAND-RESPONSE SYSTEMS

Ventura County's demand-response services have evolved in response to ADA requirements regarding rider eligibility, improving regional connections and the increasing use of emerging technologies.

All communities comply with the ADA by providing complementary paratransit services to eligible riders, something that must be maintained or replaced with alternatives that meet ADA rules outlined in FTA Circular 4701.1 (42 USC 12101-12213). Additionally, all operators also provide paratransit services to seniors.

Modern technologies have increasingly been implemented. In 2023 new app-based microtransit programs for the general public were introduced by Moorpark and Gold Coast Transit District (GCTD). These services provide real-time, on-demand transit needs in defined service areas. With the implementation of RideCo, a paratransit scheduling software, Camarillo Area Transit (CAT) and Valley Express's general purpose demand-response service has since become microtransit programs with rides now being available same day and through an app. Additionally, Simi Valley Transit (SVT)'s launched microtransit service in 2025.

As demonstrated in this SRTP's Gaps and Opportunities report and Outreach Report, Ventura County's paratransit programs are not performing optimally. Services are complying with law, expanding eligibility to serve more riders, and exploring innovative technologies to serve more people. Yet, services are operating below par and could do better. Integration of demand-response programs seeks to improve customer experience and rise above the status quo by addressing numerous factors. Areas needing improvement are summarized below, drawing upon analyses presented in the previous SRTP chapters.

UNEVEN QUALITY OF SERVICE

Many trips are currently operating either too early or too late, outside of the published pick-up windows. This operational inconsistency can lead to future ADA compliance complaints

and increased inefficiencies in ride scheduling throughout the day. From the customer's perspective, unreliability erodes confidence in the service and may discourage riders from requesting trips needed. Operationally, when drivers arrive outside the designated pick-up times, overall productivity suffers. Drivers arriving early, before the 30-minute window, may sit waiting for riders who are not yet ready to board, wasting vehicle revenue time. Similarly, drivers arriving late after the 30-minute window have higher rates of no-show trips where uncertain riders find another ride, also wasting vehicle in-service time. The resulting low productivity of fewer passengers carried can prompt reactive cost-cutting measures for reducing vehicle service hours, which further reduces the appeal and effectiveness of the service. This leads to more ride denials and a failure to adequately serve the community who depend on this service for their mobility needs.

RISING UNIT COSTS

The costs of running these paratransit/senior transportation services have risen, as documented in the Existing Conditions chapter. Table 1 below shows the average cost to operate demand-response service per hour in Ventura County. As costs increase, additional funds are needed to support existing service levels, which must come from other areas of the transit system.

Table 1, Average demand-response Operating Cost per Revenue Hour in Ventura County

Fiscal Year	FY 19	FY 20	FY 21	FY 22	FY 23	% Change from FY19 - FY23
Cost Per Hour*	$78.00	$94.00	$150.11	$131.59	$140.47	$62.47
% Change	N/A	21%	60%	-12%	7%	80%

**Figures do not include microtransit*

ABSENCE OF NEGOTIATING SCHEDULING TIMES

Negotiating trip pick-times is an area of transit operations that many demand-response agencies struggle to manage[1]. It is an established, critical practice in ADA Paratransit service to aid in matching demand with supply, moving rider trip requests from high-demand times to times when there is available vehicle capacity that can better serve that trip. For example, CAT attempts to offer a one-hour window before or after the rider's request that they cannot otherwise serve, as well as a verbal "apology." SVT estimates that 1 in 10 rides need negotiation and these are managed on a case-by-case basis. Thousand Oaks Transit (TOT)/East County Transit Alliance (ECTA) reported that some negotiations take place but did not specify what that entailed. Valley Express staff shared that negotiations may occur but there are not enough drivers to meet negotiated times, so it is of limited success. Although slightly different in operational nature, Moorpark City Transit (MCT)'s on-demand

[1] Topic Guides of ADA Transportation https://www.dredf.org/ADAtg/index.shtml

microtransit has a 20% "failed search" rate, which shows that riders are not able to get a ride at the time they requested.

Negotiation procedures are inconsistent across the County, if implemented at all, and could further affect riders needing to travel between multiple providers. Although RideCo (the newly adapted dynamic software system implemented by VCTC) helps with dynamic scheduling and moving trips to lesser-demand time slots, negotiating times with riders falls under customer-service training, which should be consistent across all providers.

DECLINING RIDERSHIP AND LOW PRODUCTIVITY

Lastly, demand response ridership significantly decreased after the pandemic and has not returned to pre-pandemic levels. Adjustments need to be made to reflect the drop in utilization. In addition to lower ridership, productivity dropped, suggesting that operators did not adjust operations accordingly in response to ridership change.

Table 2 below shows productivity (the number of rides served per hour between FY19 and FY23) for seven demand-response programs,. Four systems are declining; one has experienced no change and two have improved, with SVT quite dramatically so.

Average productivity is presented in Table 2 with and without SVT, 2.2 passengers per hour and 1.6 passengers per hour, respectively. SVT transitioned to Ecolane in 2020 and its dynamic scheduling capability enabled them to achieve a dramatic 112% increase in productivity, shifting the countywide productivity average upward. Not reported here are the microtransit services of GCTD and MCT, as these were only implemented in 2024.

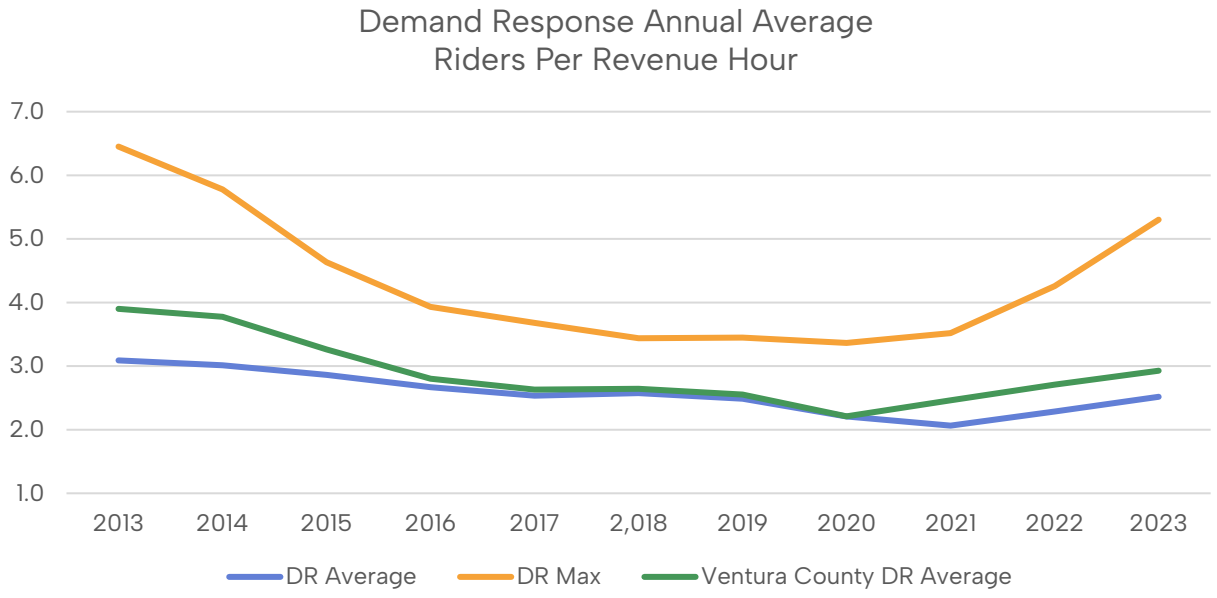
Table 2, Recent Demand-Response Service Productivity Indicators

Rides Per Hour	FY/19	FY/20	FY/21	FY/22	FY/23	% Change FY19 to FY23
CAT	2.9	0.8	2.2	2.1	2.1	-27.6%
Valley Express	2.4	1.8	1.2	1.3	1.1	-54.2%
GCTD	2.3	2.4	2.1	2.2	2.1	-9.5%
TOT	2.0	2.0	1.8	2.0	2.2	10.0%
MCT	0.5	0.4	1.6	1.8	1.6	0%
ECTA	1.8	1.7	2.2	1.4	1.4	-29.6%
SVT	2.4	2.1	3.5	4.3	5.1	112.5%
Average Overall	2.3	1.6	2.1	2.2	2.2	-4.9%
Average Without SVT	*2.0*				*1.6*	*-21.2%*

Figure 1 below shows the average rides per revenue hour for demand-response services in California (excluding large cities) via the National Transit Database (NTD). This provides a benchmark for how similar agencies are performing across the State, revealing that Ventura

County systems, while close to the averages, are well below operating experiences of a decade ago. Note that the NTD results for Ventura County average differ slightly from data provided directly for this analysis because several programs are reported to NTD differently, such as TOT rolling up its data with service provided to other agencies as their contractor for service.

Figure 1, Productivity for California Demand Response Services, National Transit Database



Principles to Establish a Foundation for Successful Integration

VCTC and its operators are strongly encouraged to improve demand-response services in key functional areas that each operator can individually address. This improvement area will achieve the desired results of: (1) improved customer service, (2) increased productivity among services, (3) efficient use of resources throughout Ventura County, and (4) cost control.

Working to achieve the improvements laid out in this section importantly lays the groundwork for integration and establishing a firm foundation for integrated services to be developed. Without attention to these improvement areas, suboptimal outcomes of rapid cost increases and poor customer experience are more likely and will be contrary to the expectations of VCTC policymakers.

These nine functional improvement areas, further detailed in this section, are:

- Improving Rider Experiences
- Shifting General Public Riders Back to Fixed Route

- Expanding Dynamic Trip Scheduling
- Policy Enforcement
- Refining Subscription Ride Policy
- Negotiating Pick-up Times with Riders
- Call Center Consolidation
- Structuring Vehicle Availability and Driver Shifts to Match Demand
- Standardizing Fare Payment Methods

RideCo, the dynamic on-demand scheduling software adopted by VCTC, has already contributed to notable improvements, particularly to increasing rides per hour. However, RideCo's implementation represents just one component of the broader integration effort. While deploying a new paratransit/microtransit scheduling and dispatch system across multiple transit services is a significant undertaking, this document focuses on the challenges that software alone cannot resolve—namely, the operational, procedural, and policy complexities that can impede a county's ability to effectively serve its most vulnerable populations. Subsequent chapters will also explore issues related to funding and cost.

As noted, the following discussion of areas for functional improvement sets the stage for successful integration activities which are discussed in the second part of this Chapter.

IMPROVING RIDER EXPERIENCE

Background – Throughout the SRTP's public input process in 2023 and 2024 and as detailed in the preceding chapter, rider and public comments were received detailing poor on-time performance with vehicles running early and late, transfer trips where the promised transfer vehicle didn't show, poor attitudes of the transit dispatch and call taker staff – though rarely drivers – and overall concerns about the availability of service to provide needed trips during peak travel hours.

The paratransit focus groups, the 2024 dial-a-ride survey, and the SRTP review of sample trip logs show that all the County's demand response services struggle with on-time performance. For all Ventura County demand-response operators and guidance from the FTA, "on-time" is considered arriving 15 minutes before or 15 minutes after the scheduled pick-up window. When speaking to the paratransit focus group, a few individuals stated that vehicles often arrive late and when using the service for work, that can lead to disciplinary issues for them. A few members of the focus group participants went as far as to say that operators falsely claim they are "on-time" 90% of the time, when their own, individual experience is decidedly different. This is an opportunity to investigate the disconnect between a performance metric and what the users perceive. There were multiple comments that texts received by the passengers that say, "the bus is coming in ten minutes" are "never right," possibly because the text software corresponds with scheduled times, rather than actual times.

Vehicles arriving late, after the scheduled pick-up time, are hard on riders particularly when they are traveling to a scheduled appointment or must wait outside, in colder or higher temperatures and with limited shelter from the weather. Sometimes, weather or traffic conditions will impact vehicles and trips will unavoidably be late. In the one-one-one interviews, riders mentioned the "inconsistent" nature of the service. Sometimes they can get to their scheduled appointment five minutes early, and other times they may arrive 45 minutes early, and other times arrive late. Late drop-offs may be due to late pick-ups or due to multiple shared-rides that extend the ride-time of the individual.

Enforcing Internal Procedure to Improve On-Time Performance - The SRTP's pick-up time analyses (detailed previously in the Existing Conditions Report) showed that vehicles sometimes arrive early, *before* the published 30-minute wait time window, which was documented in multiple operator interviews and via system-level trip analyses. Vehicles arriving early, sometimes 20 or 30 minutes before the promised pick-up time, can be stressful for riders, particularly for frail elderly people or individuals with disabilities. Moving quickly is difficult and a vehicle arriving before it is expected can be distressing. Agencies can address the factors that impact early-trip making through a combination of staff training, communication strategies, and technology. demand-response drivers should hear consistent messages about not arriving earlier than the 30-minute pick-up window, just as fixed-route drivers are instructed to never leave a bus stop earlier than the published time.

Role of Technology in Improving the Rider Experience – New scheduling software will play a key role in improving service. With RideCo and Ecolane serving as the software platforms for agencies' reservation systems, this should minimize pick-ups arriving *earlier than the programmed time window* because such trips disrupt how the software optimizes vehicle tours throughout the day. Specifically, it increases unutilized vehicle service time – something the software is trying to minimize – and reduces the aggregate number of rides that the system can schedule for that day. Also, when a driver arrives early at a pick-up location, there may be another passenger on the bus that now has to sit and wait for this individual to come out at a time other than expected, making the experience unattractive for the seated passenger as well.

The "Where's My Ride" capability (a notification prompt through Ecolane, a legacy scheduling system) is a valuable tool for providing accurate, real-time information to riders. Equally important, it reduces the number of calls into call centers, requiring less call taker time. Accurate "Where's My Ride" information will improve rider confidence in the system and let them know when to move outdoors, which can also improve safety by decreasing the amount of time passengers are in the elements. Promoting technology tools, while ensuring estimated time-of-arrival accuracy, will contribute to an improved and safer rider experience, decrease call taker and dispatcher demands, and support improved productivity. With that said, this dated notification tool is not always accurate, causing more frustration with customers. At the time of this writing, four of six agencies with paratransit

service have transitioned to RideCo which provides real time vehicle location information to passengers rather than utilizing the "Where's My Ride" feature used by the legacy systems.

Addressing Transfers through Procedure – Transfers were another area of concern that can be addressed through both procedure and technology. demand-response users were asked in the survey how they rate their transfer experience if they transfer between services. Ninety-one (91) people responded, and of the ninety-one respondents, 27% said their experience was either "fair" or "poor", pointing to the importance of improving the transfer experience. Several focus group participants described no-meet experiences, in these cases between GCTD and Valley Express vehicles, where the Valley Express vehicle returned the rider home as the transfer trip was not completed.

Several areas will benefit from firming up operating procedures for transfers.

- Enshrining dispatch-to-dispatch communications so that there is accurate information between two systems as to the actual time of vehicle transfer meetings, to better inform both drivers and the rider at the time of the transfer.
- Clarifying the driver's obligations to wait with a transfer rider for the arriving vehicle when that vehicle is late. That is the existing policy Valley Express demand-response drivers employ but is not the policy for GCTD drivers. Policies should be uniform between agencies.
- Improving the amenities of the transfer waiting facility to ensure shelter and a safe space with good lighting, seating and a restroom.

Some movement to one-seat ride trip-making - While it is true that the transition to RideCo will streamline transfer timing, the full integration of demand-response services—where fleets are no longer separated by agency—has the potential to significantly enhance the transfer experience by booking one-seat rides and then dispatching that vehicle in-local service. Such integration would enable the provision of one-seat rides for appropriate trips, offering a more seamless and efficient service for riders.

SHIFTING GENERAL PUBLIC RIDERS BACK ONTO FIXED ROUTE

Background - Paratransit services exist for individuals who cannot take fixed-route services, specifically those who are eligible under the ADA and older adults. If local policy softens those requirements and makes it easier for the non-ADA general public to take part in demand-response services, then fixed-route services will lose potential ridership from those who are able to utilize fixed-route services. Subsequently it becomes difficult to justify continuing, competing operations.

Shifting General Public Riders onto Fixed Route Service – This will involve reinvigorating fixed-route services as detailed in the accompanying SRTP. It will involve developing promotional campaigns about the alternatives and benefits of fixed route trips to actively invite riders to consider using fixed-route and to inform them of service improvements. It

will require defining new limits for non-ADA riders using demand-response services. These activities involve:

- Offering regular frequencies throughout the day so people living in these communities can take the bus somewhere and be guaranteed a return trip.
- Keeping the schedule as legible as possible with limited route variations and clockface timing
- Ensuring each operator is part of a cohesive regional schedule with connecting routes and that timed transfers facilitate intercommunity travel that can take place fully on transit.
- Concentrating on fixed-route services in walkable community areas to offer higher quality transit where it makes the most sense and letting microtransit fill in where the land use is not hospitable to transit use.

Fare Policy as Incentive - Revisiting the fare policy is another important strategy to encourage riders to choose more cost-effective services. Wherever possible, fixed-route fares should be lower than on-demand services where both services exist within the same service area. This has not been the case for some early microtransit pilots. This is a key lever available to operators in helping maintain cost control, particularly if general public on-demand service increases while fixed-route service demand plateaus or decreases. Riders generally will go to the lowest fare option, when all else is equal. Promoting the lower fares of fixed route over demand response trips is an important message. Conversely, when microtransit fares are lower than fixed route fares, as has been the case with MCT, it becomes difficult to get people to use fixed route service.

If general public ridership cannot be shifted significantly from on-demand services, both fixed route and on-demand systems will run sub-optimally which will lead to competition for passengers and inefficient use of funds for transit agencies. Underused services risk becoming stagnant and increasingly less useful to all the populations served.

EXPANDING DYNAMIC TRIP SCHEDULING

Background – Dynamic trip scheduling software improves productivity through same-day vehicle scheduling optimization. Dynamic scheduling incorporates a series of algorithms (in real-time), to adjust trip assignments for drivers and vehicles to reflect the most optimal scheduling, thereby improving the use of vehicles and ideally, shortening passenger ride times.

VCTC, through its regional transportation coordination role, established a countywide demand-response scheduling software contract with RideCo. CAT, Valley Express, MCT and TOT (including ECTA) are now using the system, as of this writing, and have seen many

benefits that include increased productivity. SVT is now using RideCo for their recently launched On-Demand service. VCTC is in discussions with GCTD regarding joining as well as with SVT regarding extending the platform to their paratransit service.

Role of Common Trip Scheduling Platform – As noted earlier in this report, an integrated countywide on-demand system will be achievable with one unified trip scheduling platform, which at this time is VCTC's contractor, RideCo. A critical benefit of a unified software system lies in its ability to capture system-wide data that can lead to operational changes positively impacting productivity and other service attributes, including on-time performance. Importantly, its dynamic scheduling capabilities can improve individual services, while also improving regional demand-response service by increasing regionwide efficiency and on-time reliability.

Additionally, a single software system can improve long-distance trip-making, providing one-seat rides or more effective, on-time vehicle connections. Travel between jurisdictions is improved through dynamic trip scheduling due to the software's ability to coordinate the "fleet as a whole" in assigning trips. Through continuous optimization, dynamic scheduling matches the best vehicle to perform a trip based on current location and next destination. In addition to more efficient vehicle transfers, the software can pool vehicles across service areas. Instead of having vehicles dedicated to one city (which may be idle at times), the software can reallocate them where demand is higher. This would reduce deadhead miles and time between drop-offs and the next pickup can be optimized across boundaries, reducing empty buses.

An integrated scheduling platform can also improve the transfer trip experience. Customers and dispatchers both spoke of poor vehicle meet-ups with transfer trips between two systems where it was not uncommon for one vehicle to arrive much later than the other. Examples from our public input process include comments that demand-response users will have a friend or family member pick them up outside the boundary, instead of trying to connect to another service. A single software system across the county eliminates this issue. A unified scheduling system can either shorten the waiting time for the rider or eliminate the need to transfer all together.

Concerns About Co-Mingling ADA and General Public Riders – While RideCo is extremely efficient at scheduling rides, it is important to recognize that in co-mingled services with both general public and ADA riders, it will be necessary to continue to educate call takers and dispatchers on the FTA ADA rules and ADA priority requests. In other words, agencies must not lose sight of providing for this Civil Right trip by giving priority to ADA individuals, even if some efficiency in the ride-scheduling is affected.

To address the challenges of co-mingling rider groups, it is recommended that agencies:

- Explore RideCo's capability for accommodating multi-system trip scheduling and dispatch functions, while ensuring compliance with the ADA complementary paratransit rules
- Use RideCo's reporting capabilities to monitor trip demand and vehicle deployment, adjusting driver/vehicle schedules or passenger promised pick-up times to better fit supply with demand.
- Integrate transfer trips into RideCo's multi-system capability, evaluating the potential for a shared fleet.
- Explore RideCo's ability to assign a fund source (responsible city) to each trip and to regularly generate reliable, equitable trip billing amounts to partners using a defensible methodology.

Data Concerns – In terms of data-oriented concerns of the sponsoring municipalities where all cities/operators are housed under one CAD/AVL system, notably the cities/operators will not lose control of their own platform and data. RideCo has the capability of creating segregated systems or zones for each operator's jurisdiction. There is no one entity controlling the parameters within RideCo. Those parameters, such as days and hours of service, can be determined individually by the operator and can be adjusted whenever they choose, while still ensuring that the customer can navigate travel throughout the region using a single RideCo application.

POLICY ENFORCEMENT

Background – Policies in several areas deserving of attention can be standardized in an integrated environment and will help to improve on demand operations. Differing among the operators, policies can be made uniform, establishing a critical foundation to planned integration efforts. These are largely, but not exclusively, rider-oriented policies.

No-Shows and Late Trip Cancellations – Enforcing policies to reduce no-show trips and late trip cancellations will automatically improve trip scheduling and contribute significantly to improved productivity. Enforcement requires clear, consistent, and continuing communication with riders, as well as follow-up by call centers and dispatchers. Abuses to these policies, or even casualness in cancelling un-needed trips, translates into wasted vehicle revenue hours. Although it may not seem like a big issue for any given trip, these continued one-offs accumulate to larger trends of unproductivity. A performance goal of less than five percent (5%) of combined no shows and late cancel trips is a desirable goal. Multiple Ventura County operators are well above this.

Dwell Time – It is strongly recommended that dwell-time policies be consistent across all systems and consistently reported using common definitions of dwell time (the time the vehicle is standing at the curb awaiting a passenger). If there are different dwell times for different operators, this can sow confusion among passengers that transfer or use more than

one system, potentially leading to increased no-shows, lower productivity and more stress for the passengers.

Automated Call Messaging – Most services have automated call messaging about when vehicles arrive, which is a first step in gaining rider confidence. However, ensuring these messages report actual arrival times to the rider (and not scheduled arrival times of vehicles) will further increase confidence and encourage riders to be ready to board when vehicles arrive. Having real-time vehicle information available to passengers is even better.

Advance reservation policies – Most of the demand-response programs in Ventura County allow for trip reservations of up to two weeks in advance. Shortening this to one week in advance is one strategy for reducing no-show and late cancellations as it requires that the trip be closer in time to the making of the reservation. With that said, this strategy may not work for every agency but can be examined at the local level. For some riders, this is difficult where they have medical, dental or therapy appointments that are made well in advance and the rider expects assurance that they have a ride to their appointment, so it is important to balance these needs.

REFINING SUBSCRIPTION RIDE POLICY

Background – Subscription rides are recurring trips where passengers have consistent travel needs at the same time on a regular basis. Subscription rides can create efficiencies in the system. However, in outreach conducted in 2023, some operators indicated that when rides are scheduled two weeks in advance, it tends to lead to an increase in no-shows (as mentioned in the section above). Therefore, striking a balance between efficiencies and enforcement is important to note here. Subscription rides are based on the *appointment* time, not the time that the individual would like to be picked up. Increased productivity can be possible with subscription rides because they provide a scheduling framework around which other, non-recurring trips can be efficiently slotted in.

Recognizing the Value of the Right Balance of Subscription Trips – For riders with recurring medical trips, such as oncology or dialysis, a subscription trip reservation gives the rider confidence that they will have a ride when the appointment arrives. Hence, subscription rides can increase customer satisfaction and increase productivity across the system.

From an operational viewpoint, under the FTA guidelines for ADA complementary paratransit, an agency is allowed to assign no more than 50% of trip capacity to subscriptions at any given time (CFR 37.133). The FTA wants to ensure that there is still a focus on providing flexible, demand-responsive services to meet the needs of the broader paratransit community, not just those with recurring trip needs. These recurring rides often become the framework upon which an efficient tour of trip pick-ups can be scheduled. RideCo software allows for subscription rides, therefore schedulers must monitor the volume of subscription rides to non-subscription rides to stay within FTA's ADA regulations.

NEGOTIATING PICK-UP TIMES WITH RIDERS

Background – There is little evidence that Ventura County demand-response programs, with advance reservation, are consistently negotiating rider pick-up times, at the time of reservation or later up to the day prior to the reservation. Negotiating pick-up times is critical to improving productivity where agency dispatchers spread demand throughout the operating day to the greatest extent possible, given consistent peak travel times. This is particularly important for systems with higher "early" trip arrival experience, where drivers are arriving at pick-up addresses early before the pick-up window has begun. As noted, no trips should arrive earlier than the pick-up window. This is consistent with fixed-route practice that buses do not leave bus stops earlier than the scheduled time. Also, it is important to note, the guidelines about pickup windows for paratransit services under the ADA are outlined in the FTA Circular 4710.1:

> *Pickup Windows: According to the FTA Circular 4710.1 (dated 2015), Section 5.3 outlines the "On-Time Performance" of paratransit services. The pickup window should be defined as a 30-minute window (15 minutes before or 15 minutes after the scheduled pickup time). This gives both the passengers and the service provider flexibility while maintaining a timely and reasonable service.*

Implementing Trip Negotiation Procedures Negotiating different pick-up times than the customer requests are difficult for call takers. It also requires some understanding of real-time vehicle capacity, which is information that may or may not be available to call takers in current circumstances. Both factors are barriers to implementing trip negotiation procedures. However, not negotiating trip pick-up times limits productivity, makes minimal use of lower demand periods and loads up trip requests during higher, peak demand periods.

Failure to negotiate pick-up times for well-known riders who use the system often may, unknowingly, stop new riders from trying the service if they are consistently being denied rides. This informal practice reflects "capture" by a small group of riders and resultant limitations for new riders. New riders who consistently encounter, "there are no pick-ups available during that time," when popular time slots are captured by existing riders, become less likely to try to use the service again.

Negotiating times requires software that can offer options and direction as to which trips to negotiate and what new times to offer. Negotiating trip times requires procedures that direct staff to take on this task, including scripts as to how to present the negotiated times to riders and how to address their responses. In addition to software aid, call center procedures and Standard Operating Procedures must also be developed for training purposes.

CALL CENTER CONSOLIDATION

Background – Through the process of integration, efficiencies will start to surface, including working through the improvement areas of this list. One of the more structural realizations of integration will be decisions to consolidate call/dispatch centers. Sometimes termed a One Call/Dispatch Center, establishing a single dispatching function through a consolidated call center can result in a spectrum of benefits. This can be achieved even in environments where systems retain separate operating control. Consolidated call center examples and their benefits, some of which have already been mentioned, include:

- Transit and information sharing among call center representatives and dispatchers responsible for serving the whole county who will share facilities and space, instead of siloed into multiple operating environments.
- One phone number for demand response riders to call. When conducting stakeholder focus groups during January 2024, Ventura County's Chamber of Commerce voiced that they did not know who to call or where to start. Human Service agencies voiced that many transfers are needed for their clients that do not know where or how to start that process. Public feedback asked "what phone number do I call to learn about these resources?" Repetitive branding of one number and one website can help gain confidence among the community.
- Reduced personnel or greater coverage of operating hours, leading to either reduced costs or better use of the workforce.
- Better transfer experience among customers where the vehicles "meet" are better timed and will be more effective when done by a single dispatching operation.
- A better understanding of fleet use across the region and potential reduction in deadhead hours.
- Immediate coordinated support to emergency services and future potential for other call center consolidation efforts such as emergency management, and police/fire. This could lead to new funding opportunities outside of transit to support this effort.
- A reduction in difficult and lengthy passenger transfers, improving the customer experience and utilization of vehicle deployments.

Approach – As each jurisdiction's demand response program seeks to improve its operation in the functional areas of this listing – including the continued implementation of RideCo dispatching software. There will be steady opportunity to explore consolidated call operations that may include the following:

- Consider staffing – It will be necessary to clarify the numbers of staff responsible for all or parts of the call taking and dispatch functions. Assignments may change with the introduction of RideCo processes, where the software reduces the need for human responsibilities. It may make sense for remaining tasks to be consolidated or assigned differently among existing personnel.

- Consider facility options – Facilities at GCTD and at SVT each have potential for one large call center. Currently, there are six dispatching facilities for the nine systems, with MCT, TOT and ECTA Intercity demand-response sharing a dispatch center through their contractor. The 211 Ventura/Interface Children and Family Services also has a combined call center facility that has room for expansion. Its managers show some interest in a transportation call center capability as consistent with its mission of linking Ventura County residents with services and currently has some limited unspent FTA Section 5310 transportation funds that could support a startup effort.
- Consider contract implications – During this period of work within existing contract frameworks, jurisdictions should actively consider what level of staffing and resources they might wish to put to the call taking and dispatching activities going forward. That will help to inform upcoming contract changes.

STRUCTURING VEHICLE AVAILABILITY AND DRIVER SHIFTS TO MATCH DEMAND

Background – Matching vehicle deployment to trip demand is important for service quality and efficiency. Establishing driver/vehicle shifts to reflect rider demand patterns is an effective way to increase productivity, thereby decreasing costs per trip. It helps improve on-time performance and the rider's experience.

Moving Driver/Vehicle Shifts to Reflect Trip Demand – The typical two peaks of late morning and mid-afternoon documented for several systems point to the importance of staggering driver shifts. More resources are needed at times when demand is greatest. This may lead to some split shifts to match predictable demand patterns with vehicle supply, a frequent practice in the delivery of on-demand public transportation. Understandably, with split-shifts, drivers are more difficult to hire than full-time 8-hour shifts. However, as the number of rides increase (under a split-shift model), the overall number of trips *per day* increases, which may decrease the amount of time between shifts making split shifts more attractive to drivers, and most importantly, easier for riders to utilize.

Careful data analyses of trip demand, including negotiated trip pick-up times, will help operators decide optimal scheduling of vehicles and drivers. Matching resources with demand will improve productivity and, importantly, help to control costs.

STANDARDIZING FARE PAYMENT METHODS

Background and Approach – Ventura County transit operators are improving their unified fare payment systems, through VCbuspass/Umo, the implementation of Tap2Ride, an open loop payment system and through RideCo, which is currently implemented by some transit operators. The objective of these payment options is to make it easier for riders to easily pay the fare on Ventura County transit systems. This has positive implications for demand-response users. In participant interviews, Valley Express riders described the benefits of the VCbuspass/Umo fare payment app for demand-response trips, moving away from either the

pre-loaded fare card or cash. Riders pointed to the hassles of securing and carrying cash or traveling to a transit store to put funds onto a fare card or to a bank to secure cash. Integrating into one payment apps will drastically improve the customer's experience. Unifying fare payment options, and promoting these, will help to build confidence among riders and potential riders, making it a better experience for all.

At the time of this writing, VCTC is working with RideCo to implement a point-of-sales system linked to the reservation platform, which will help increase customer satisfaction even more.

Governance in Support of Integration

BACKGROUND

In 2023, VCTC adopted a report titled "Transit Integration and Efficiency Study" (TIES), which looked at the nine different bus transit operations in Ventura County. Connections between cities rely almost exclusively on VCTC Intercity services, partly due to distances and mountain ranges separating community centers that would make for inefficient and unproductive local routes. The study noted that while the agencies in Ventura County provide high-quality service for local riders, the individual operations do not form an effective regional network. The study articulated three alternatives for improved efficiency. Two of the three alternatives are important to this discussion, which are:

- Alternative 1: Partial consolidation
    - o Subregional Demand-Response (paratransit and dial-a-ride) Consolidation and Increased Agency Coordination.
    - o Consolidate East County demand-response services into ECTA as a new, formalized organization, with all other agency-cities retaining administrative control of fixed-routes.
- Alternative 2: Moderate Consolidation
    - o Countywide Paratransit, and Subregional Fixed-Route Consolidation.
    - o Consolidation of all demand-response (paratransit and dial-a-ride) operations into a new countywide agency. Consolidation of fixed-route operations by geography with Simi Valley, Thousand Oaks, Moorpark, with VCTC East County Route becoming an east county transit agency, and all other services being consolidated with Gold Coast Transit District (GCTD).

The Commission approved the final draft Transit Integration and Efficiency Study, and approved adoption of Alternative 1 and the continued study of Alternative 2 with incremental

implementation of Alternative 1 commencing after approval. This analysis is the continued study of Alternative 2.

Alternative #1 sets the stage of creating two separate demand-response programs (west-county and east-county), which would be the steppingstone for Alternative #2. However, this portion of Alternative #1 has not yet been implemented, therefore, the following governance assumes the integration of all demand-response programs from independent operations. Specifically, Alternative #2, which envisions improved fixed-route services for each of the cities, but with an integrated demand-response program, was recommended for the future of the County. Alternative #2 provides a synopsis of governance, planning and funding for an integrated demand-response program. This section focuses on the governance requested in Alternative #2 of the TIES study, and suggests strategies for implementing future governance structures that will support integrated services.

TIES Alternative #2 states:

> *"Parallel with this effort would be preparing to transition demand-response service to a new, separate agency. These discussions are integral because it involves developing funding agreements from the constituent communities and establishing a separate legal entity. However, establishing a completely new agency could take additional time, and the lead time to get the new operation fully up and running could easily extend to 2 years, depending on how long negotiations take."*
>
> *During the development of the countywide demand-response agency, a similar process to Alternative 1 is required to create rider and service policies that are uniform (by service type, if not geography); however, unique local services such as a general public dial-a ride in a particular community are not assumed to be discontinued or substantially altered."*
>
> *The countywide demand-response agency would follow a similar set of strategies to Alternative 1 for the creation of a countywide call and scheduling center.*

Table 3 presents the current governance structures and information about the existing operating responsibility for the county's nine on-demand services, which is important background to thinking about integrated service delivery.

Table 3, Existing Management Structures of Demand Response Services

CITY MANAGED		
DAR Service	DAR Operator	Notes
CAT	RTW Management	Facilitated by RideCo Software

TOT	MV Transportation	Facilitated by RideCo Software
ECTA	MV Transportation c/o Thousand Oaks	MOUs between Thousand Oaks, Simi Valley and Moorpark, Facilitated by RideCo Software
SVT	In-House	Facilitated by Ecolane Software* **Transitioning to RideCo at the end of the Ecolane contract period 6/30/26*
MCT On Demand (Microtransit)	Transdev	Facilitated by RideCo Software
MCT	MV Transportation c/o Thousand Oaks	Administered by City of Thousand Oaks under contract with Moorpark
Ventura County	MV Transportation c/o Thousand Oaks	East County Transit Alliance/MOU
INDEPENDENT AGENCY/ELECTED BOARD		
DAR Service	DAR Operator	Notes
Gold Coast Go Access/Go Now	In-House	Gold Coast is a Transit District Facilitated by Ecolane Software
Valley Express	MV Transportation	Agreement between Fillmore, Santa Paula, the County, managed by VCTC (overseen by a policy board), Facilitated by RideCo Software

FUTURE GOVERNANCE

Developing a new countywide demand-response agency will require legislative changes to current county/state level statutes or rules, loss of local control, a potential elective process, creation of by-laws, and capital and financial resources. Therefore, this report provides a simpler, gradual approach for the beginning stages of integration. However, clear over-arching policy direction, coupled with leadership and strong facilitation will be critical to ensure the phases for integration are implemented properly and desired benefits achieved.

Two options for overall governance are proposed, derived from best practices and peer experiences, and thought to best support Ventura County's integration efforts. 1) a Memorandum of Understanding (MOU) process and 2) a Joint Powers Agreement (JPA), are introduced here in terms of activities by general timeframe and counting the pros and cons of each approach. Further implementation details, including some discussion of sequencing these, are provided.

OPTION #1 - MEMORANDUM OF UNDERSTANDING

VCTC and the nine demand-response programs can enter into one large MOU outlining the responsibilities of each party, which would include the integration phases mentioned in the following pages. In addition to the creation of an MOU, a technical advisory committee (TAC) would be created to facilitate conversation on integration steps and timing (more discussion on the formation of a TAC is proposed in the following pages).

Pros and cons of setting up a countywide MOU to govern integrated demand response service delivery are illustrated below.

ADVANTAGES	DISADVANTAGES

• Allow cites/operators to keep control over day-to-day operations.
  ○ Does not involve movement of facilities, maintenance yards, employees, administrative facilities/functions.
  ○ Easier and faster to come to a consensus between all parties
• It is easier to implement once a cost-sharing method is set up and agreed upon. The cost-sharing method must accurately reflect the volume of services each city provides, presumably with more than the per-ride cost factor based on revenue hours of the ECTA cost-sharing method.
• Less commitment of time and resources
• It provides flexibly to change roles and responsibilities over time.
• Provides opportunities for continued collaboration and cooperation.
• Provides time to evaluate the success of the implementation items.
	• May not lead immediately to the efficiency gains that would be more quickly achievable through a JPA.
	• It will require administrative time and leadership from VCTC, given the multiple agencies and contractors involved.

OPTION #2 – JOINT POWERS AGREEMENT

The second option is likely to follow an MOU process. It will involve more highly structured, formalized governance that can evolve as operating experience and trust builds through the MOU process.

ADVANTAGES	DISADVANTAGES
• Provides more legal binding/structure/framework for what VCTC and its policy makers are trying to achieve through an integrated on-demand program, serving all of Ventura County. • Provides uniform policy making and implementation across all operators. • Would dedicate transit funding to the new entity by formula. • Could lead more quickly to efficiency gains than an MOU.	• The creation of a JPA requires time, energy, and resources from VCTC and its transit operators. • Existing operating contracts will need to be separated between fixed-route and paratransit services. • Funding must come from existing operators as there are no new funding sources for the agency. * • Disagreements on funding splits and service level equity may stall the process of further integration.

**If additional funding becomes available during the integration process, the funds will be dedicated towards integration and not additional* demand-response *service hours.*

Governance Recommended in the Short-Term and Long-Term

YEARS 1 – 3

Development of Memorandums of Understanding

This report recommends that VCTC develop a MOU with the demand-response operators in Ventura County, detailing the goals and strategies for integration of services as presented in this report. Currently, there is the ECTA MOU in place between TOT, SVT, MCT, and County of Ventura, with a fifth amendment signed in March 2025 and terms through June 2027.

This report recommends building off the existing ECTA MOU at the beginning stages of integration for the following reasons:

- The ECTA MOU is a successful document already in place with four entities currently integrating services.
- An MOU allows VCTC and the operators time to understand the efficiencies of integration (which may not be seen for another year or two through countywide implementation of RideCo and data collection). These efficiencies can result in economies of scale, resources saving, etc. – all of which can be written legally into a future JPA down the road.
- TRANSCOM should review RideCo data (quarterly) to see why and where the following occur:

    - Increases or decreases in passengers per hour per agency.
    - Increases or decreases in costs per passenger and costs per mile.
    - Increases or decreases in deadhead hours and miles traveled.
    - Increases or decreases in passenger miles traveled.
    - Service volume by community and by operator.
- VCTC and the cities need time to review contracts, talk to their legal teams, and review their terms with their operators, specifically for those who use the same contractor for both fixed-route and demand-response services.
- VCTC and the municipalities need to understand the funding effects of integration and what additional funding sources may be available, including grant sources or city general funds.

Specific areas of the ECTA MOU that are worth continuing forward and building off include:

The goals listed in the 2013 MOU:

- *Provide public transit services that are inclusive, customer-focused, efficiently operated and financially viable.*
- *Enhance existing transit services and options through a cooperative and collaborative partnership that balances regional concerns with each agency's unique transit need.*
- *Improve local and inter-agency transit connectivity within the ECTA service area and with other transit service providers in Ventura and Los Angeles counties.*
- *Improve coordination of public transit services in the key areas of scheduling, fares, eligibility, marketing and outreach, and policies and procedures.*
- *Establish a single provider for ADA and senior* demand-response*service within the ECTA service area.*
- *Leverage cost efficiencies through coordinated purchases of services and equipment, shared use of facilities and other capital resources, and investments in technology.*

Use of existing Management Committee

- *The existing Management Committee can be built upon as the TAC, who can guide integration.*

The creation of another committee may be understandably unappealing among staff, but using the current Management Committee structure as a starting point may be the best approach to build buy-in. This committee would focus solely on demand-response and would retrieve current employees whose focus is paratransit and senior transportation.

There would be one representative from each city. Year 1 would involve heavy input from its members but could potentially evolve into lighter duties as Year 2 and 3 progress.

Review of Current Contract Terms

At the time of this writing, the operator contracts will end during the following time frames:

CAT	Contractor: RTW Management	2024 Agreement for four years through June 30, 2028, with possibility of up to (3) one-year extensions
MCT	City of Thousand Oaks/MV Transportation	2nd Amendment extends contract with MV Transportation through 6/30/2025
TOT/ECTA	MV Transportation	5th Amendment extends through 6/30/27
Valley Express	MV Transportation	2023 Agreement through 6/30/27, with extensions in 2028, 2029, and 2030

With regards to how to phase contracting, it would make sense for CAT and MCT to extend contracts through 6/30/28, then have one unified RFP created in the winter of 2027, with a start date of July 1st, 2028, for all cities going forward.

VCTC's Facilitation and Leadership Options

Although an MOU will articulate guidance going forward, there will still be a lot of administrative guidance required over a one-to-three-year time frame to ease all aspects of a successful integration. Given the sensitivity and complexity of integration, this report recommends hiring of a Client Representative (Client Rep) who can act on behalf of a client (VCTC) for a limited period, but has a narrower scope focused on the objectives of the project, in this case the implementation of an integrated service structure. A contracted Client Rep is a third party who may have more success in encouraging integration initiatives than someone affiliated with a locally known entity. It is expected that this will follow an RFP process, presuming that VCTC wishes to establish a contracted, non-employee-type relationship.

Similar examples of where transit agencies have hired a Client Rep for the purpose of integration include:

- Massachusetts Bay Transportation Authority – hired a Client Rep to provide oversight, coordination, and integration of transit programs that involved

multiple contractors and stakeholders, specifically for the Green Line Extension project.

- Metropolitan Transportation Commission, San Francisco Bay Area – hired a Client Rep to unify regional services among 27 transit operators, specifically for: regional fare integration, service branding and coordination, and customer experience – all of which are detailed in a document called the "Transit Transformation Action Plan."
- Greater Toronto and Hamilton Area – Metrolinx – hired a Client Rep to lead service integration across local transit agencies (TTC, Go Transit, MiWay, York Region Transit). Focus areas included: fare harmonization, service planning coordination, and cross-boundary service agreements.

YEAR 3 ONWARD

Revision and elevation of ECTA MOU/or Transition from MOU to JPA Structure

The primary goal of Years 1 – 3 is to gain confidence and filter guidance for the development of an agreement, (built off ECTA's MOU), with the intention of subsequently developing a JPA from that framework. Afterwards, the secondary goal is to refine implementation activities and evaluate performance.

Once Year 3 is underway, VCTC will determine whether to (a) continue contracting with the Client Rep, or (b) end the contract with the Client Rep and hire a new individual as the FTE to lead the integrated agency, or (c) end the contract with the Client Rep and hire her/him on as the FTE (assuming VCTC and the operators were satisfied with the leadership of the Client Rep).

The key features of the JPA will include:

Collaboration: The JPA will enable VCTC to collaborate on initiatives with all the cities/operators.

Shared Resources: The JPA will detail how operators can share resources (i.e., fleet, CAD/AVL equipment, call center infrastructure, administration and programming).

Legal Entity: Unlike the first developed MOU, the JPA will have legal ramifications for cities/operators that may not meet the performance metrics and aims of integration. Specifically:

- A JPA creates a new legal entity that is distinct from the participating agencies.
- A JPA can enter contracts, own property, and/or incur debt.
- The JPA entity holds legal responsibility for its actions and can extend to the individual agencies involved.

- Regarding budget and/or funding – if one entity does not fulfill its financial obligations, it could lead to a breach of the JPA, which could result in financial penalties or lawsuits.

Governance: The agreement outlines how decisions will be made, how funds will be allocated, and how the operations will be administered.

Phasing for Successful Implementation

METHODOLOGY

The method behind phasing the integration of demand-response services starts with simple actions that include the improvement areas examined at the outset of this chapter and gradually becomes more complex in scope. Starting with less complex activities can increase participation among stakeholders, involves less capital, and resources, creates momentum and provides a foundation to integrate more complex resources down the line. Each phase lists recommendations, immediate actions, timing and resource needs. While these phases are generally sequential, some activities may overlap and not be strictly limited to following the preceding phase. Specifically, Phase 3 is labeled as the "Operator Consensus Process Review" that will be on-going throughout the entire integration process and extremely important for collective agreement on all other phases. In addition to Phase 3, informational aspects of the "final" sixth phase (Branding, Marketing, Education and Promotion) may in fact be introduced at multiple points in the preceding phases.

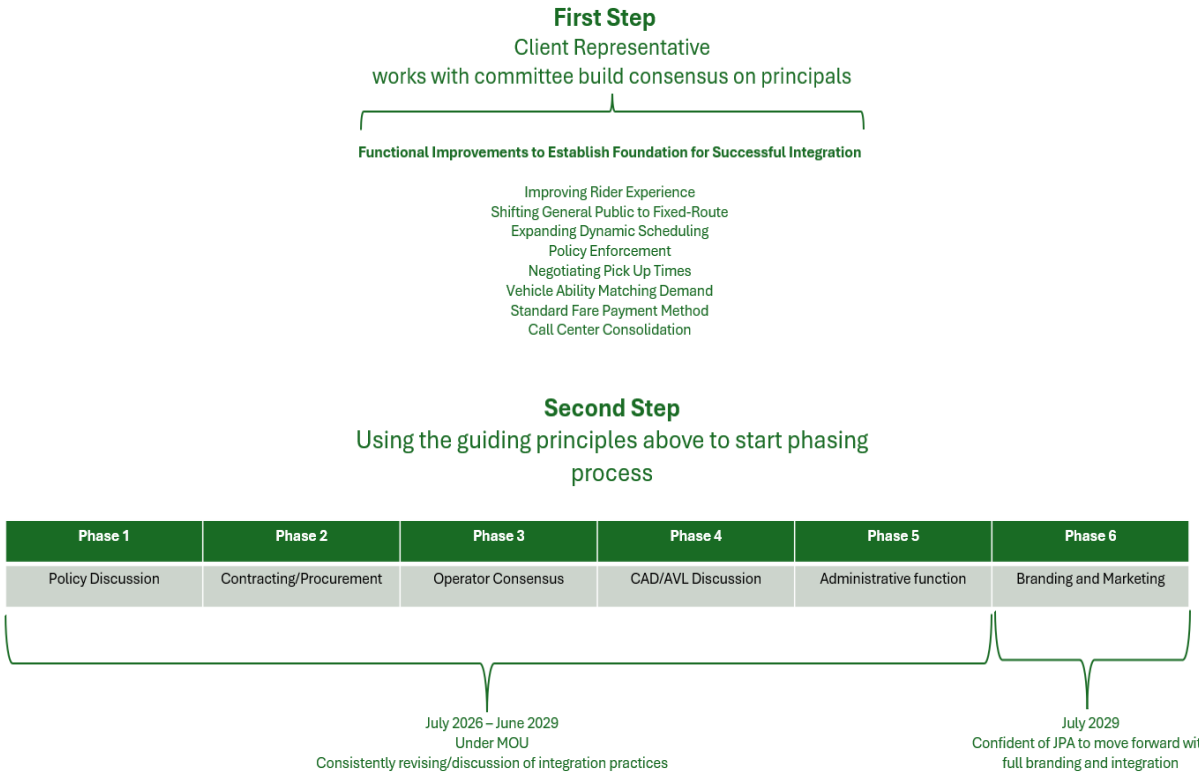
These six phases are:

1. Customer Facing and Internal Policy Alignment Across demand-response Systems
2. Joint Procurement, Life Cycle Analysis, and Contract Review
3. Operator Consensus Process Review
4. Potential Changes to Existing Call Center/Dispatch Systems
5. Administrative Analysis
6. Branding, Marketing, Education and Promotion

Phases are key building block processes, to set up the basic parameters of an integrated system. These would likely be done under the MOU governance option and supported with leadership from the Client Rep. Phase 3 is an important consensus-building process that will determine whether the system moves forward into a more formalized, integrated JPA. Phase 4 details considerations in building a centralized call center; and Phases 5 and 6 develop later in the process, as performance trends from RideCo become clearer and lead agencies in the right direction. However, many of the actions in Phase 6's branding will need to be incorporated along the way for information outreach and knowledge of how the revised on-demand systems run.

The Client Rep plays a critical role in moving these phases forward. They will establish a flow and rhythm within each phase and between the phases. The Client Rep will build agendas that help structure the dialogue among the operators and with VCTC in relation to policies and procedural areas. They are expected to work with the operators to problem-solve as issues inevitably present. The Client Rep may have responsibility for crafting selective written products that move the phases forward, such as draft policy statements, working procedures and competitive procurement documents. Importantly, the Client Rep will help resolve the inevitable issues not identified in this initial plan or unanticipated requirements that develop as other consequences of implementing the phased activities occur.

Figure 2, REALIZING INTEGRATED DEMAND RESPONSE SERVICES FOR VENTURA COUNTY THROUGH PHASES



The following tables detail specific activity areas of each of the six phases over a three -year period, consistent with the principles and direction previously discussed.

SIX PHASES

PHASE I

This first phase builds heavily upon the service improvements of the preceding period, moving towards policy alignment in multiple areas. This will follow formal direction by the VCTC policy makers to move forward and by the agreement, tacit or otherwise, of the jurisdictions.

Phase 1: Year 1	
Customer Facing and Internal Policy Alignment Across DAR systems	
Background: This first phase is not capital-intensive but requires earnest conversations regarding policy decisions among the current demand-response systems. The lists below provide a guide for what should be discussed during this phase.	
Customer Facing DAR Policies	Recommendations
Hours of Operations	To be Determined by TAC*
Days of Operations	To be Determined by TAC*
Advance Reservation	No more than 14 calendar days
Same Day Reservation	Yes, only possible with dynamic scheduling software
ADA Eligibility Process	Continuing with ADA eligibility processor
On-Time Window	30 minutes (15 mins before/15 mins after)
No-Show Policy	3 or more will lead to suspension from the program, with proper appeals process in place
Late Cancellation Definition	Less than 2 hours
Dwell Time	5 Minutes
Prioritization of Types of Rides	(1) ADA (2) Over 65 (3) general public
Code of Conduct/Bus Rules	To Be Determined by TAC
Internal DAR Policies/Benchmarks	Recommendations
Determine On-Time Performance Measures	No more than 5 mins early/No more than 10 mins late of ADA window, 95% of the time
10/10 Radio Policies	To be Determined by TAC
Passengers Per Revenue Hour Benchmark	Industry Standard w/software 3.5 rides/hr or more*
Cost Per Ride Benchmark	To be Determined by TAC*
Measurement of Denied Rides	To be Determined by TAC*; Focusing on no denials of ADA certified riders
Percentage of No-Show/ Late Cancel Trips	Goal of < 5%, combined no show & late cancel
Fare Policy (no more than double the cost of fixed route for the same trip for ADA certified riders)	To be Determined by TAC*

Phase 1: Year 1	
Review of Curb-to-Curb and Door-to-Door Polices	Discussion among TAC members on (a) the differences in policy, (b) potential customer services issues with either policy, and (c) best practices that agencies have experienced and shared with one another
Fare Payment Method/Branding/Marketing	To be Determined by TAC/RideCo App
Review of Service Animal Policy	TAC to (a) discuss customer interactions and questions asked, (b) determine what constitutes an animal carrier, (c) share difficult interactions with customers and how best to address them
*Benchmarks do not need to be uniform across each agency, but consensus on what is productive per location is desired. National benchmarks are detailed in an appendix to this document.	

PHASE 2

Phase 2 is likely to commence during year one and may well overlap or be concurrent with activities of Phase I. This addresses the procurement and contracting opportunities of an integrated environment and needs to be mindful of existing contracts' end dates.

PHASE 2: YEAR 1
Joint Procurement, Life Cycle Analysis, and Contract Review
Background: Similar to Phase 1, Phase 2 does not require capital resources, but requires time and energy from agencies' procurement and legal divisions. Below are areas of potential coordination and benefits to economies-of-scale procurement.
Opportunities for Joint Procurements/Areas of Analysis
Demand-Response Fleet Needs
Demand-Response Radio/Communications Equipment Needs
Lifecycle Fleet/Equipment Analysis
Asset Management Software Systems
Insurance Comparisons
Request for Proposals Templates
Invitation for Bid Templates
Review of contractor terms, conditions, and end dates for contracted services
Procurement Evaluation Templates

Regarding fleet procurement, most (if not all) demand-response agencies purchase through the CalAct/Basin Transit Purchasing Cooperative[2]. This is an effective and efficient option for vehicle purchasing, in operation since 2009. However, Phase 2 is asking agencies to go *beyond* just vehicle procurement. There are efficiencies to be gained in the collective procurement process among all the demand-response agencies. Collective procurement could include the purchasing of security equipment, fare-related software and/or infrastructure, signage, shelters, bus parts, mechanical needs, etc. Also, as procurement bids grow, the integrated agency will have more purchasing power, become more attractive to the bidder, and add more choice to choose from.

In addition to the procurement process, efficiencies can be gained in the administrative overhead involved in this effort. Specifically, there is less duplication of effort across agencies, it is easier to track vendor performance, ensure compliance, and resolve disputes; and standardized contracts reduce legal complexity and the risk of inconsistent terms, delays, or unfavorable clauses.

Economically, buying in larger volumes allows for lower per-unit pricing, better service-level agreements from vendors, and bulk discounts on vehicles, fuel, software, and equipment.

PHASE 3

Phase 3 intends to arrive at consensus, through a structured meeting process, and to memorialize that in relation to the review of key functional areas, internal procedures, and communications tools.

PHASE 3: YEAR 1	
Operator Consensus Process Review	
Background: Phase 3 aims to understand the intricacies related to each agency's internal communication culture, as well as the type of communication provided to its most vulnerable populations.	
Internal Operations Process	Outcomes
Agencies to discuss customer service culture and expectations	To be Discussed By TAC
Call Center Training Documents/Videos/Materials	Review each agency's materials and procedures to see what is the most effective for staff training
De-Escalation Training for Drivers, Dispatchers, Customer Service Representatives	Review each agency's materials to see what is the most effective

[2] https://calact.org/programs/

PHASE 3: YEAR 1	
How to Handle ADA/Title VI Complaints and Concerns	To be discussed by TAC; using existing VCTC and operator Title VI Programs as a guide
Agencies to review what classifies as an "incident" and current reporting practices (i.e. extensive list of types of incidents, reactions and protocols); and Agencies to provide chain-of-command for incidents and accidents	To be Determined by TAC; Reviewing past incident reports and best practices to develop response. The FTA Research Report No. 0204 "Effective Practices in Bus Transit Accident Investigations", could be a starting place for guidance.
Agencies to Create Employee Progressive Discipline Program	To be Determined by TAC; Reviewing existing employee discipline programs to develop; considering the U.S. Department of Labor's Public Transit Employee Protections 49 U.S.C. § 5333(b) to ensure compliance
Systematic Approach for Reporting NTD Data	To be Discussed by TAC; Using existing NTD reporting protocol by transit operators as a guide and consideration of expanding TransTrack licensing for NTD data submissions

Phase 3 will be revisited throughout the integration process, expected to happen concurrently with various other activities. Agencies are ever-evolving, and the culture of each agency cannot be easily explained in a few meetings, but with time agencies will better understand how their operations work to serve their individual communities through standard operating procedures. thi

PHASE 4

This phase is focused on the call center and centralized dispatching function. It will commence after the bulk of the work identified in Phase 3 has been completed, along with the first two phases. This phase assumes there is substantial alignment of policy and procedure, through the work of the preceding phases. It also assumes a deeper operational understanding of the type and needs of a fully integrated call center and dispatching system.

PHASE 4: YEAR 2
Potential Changes to Existing Call Center/Dispatch Systems

PHASE 4: YEAR 2
Background: Phase 4's integration is complex, time-consuming and will involve time and effort to achieve results.
Dynamic Scheduling Software
Discuss how each agency uses the software and see what trends emerge
Decide what customized fields are needed for integration
Discuss User Management Roles
Integration of customer profiles from other systems
Understand how RideCo will work in one jurisdiction versus another, especially when it comes to transfers and how vehicle use could work across jurisdictions
Integrated Call Center
Earlier in this document, it was mentioned that there may be more space for an integrated Call Center within existing facilities. In addition to space integration, other satellite agencies need to consider the following:
Ensure all computers have Voice Over Internet Protocol (VoIP)
Uniform messaging system/branding/phone tree
Understand radio contracts/usage across DAR systems/10-10 radio etiquette
Comprehensive Review of DAR Customer Profiles
Review differences in how customer profiles are developed, what do the ad hoc notes written in the profiles mean for each agency?
Understand how phone reservations integrate with RideCo's mobile and online trip requests

Phase 4 will involve a lot of work on the part of the Client Rep to dive deep into the RideCo software to ensure increased uniformity across the system. The Client Rep will also need to connect with RideCo directly, and not just rely on the operators to understand the system.

In addition to gaining software knowledge, it will fall to the Client Rep to examine and catalogue the existing equipment, and future equipment needs related to call centers and dispatching stations.

PHASE 5

This phase is focused on the employee aspects of an integrated demand response program.

PHASE 5: YEAR 3
Background: Phase 5 looks at employee support, roles and responsibilities related to integration and decides the proper staffing and coverage needed to run effectively. Specifically:
Administrative Analysis
Review of DAR roles and responsibilities/job descriptions
Full Time/Coverage and Shifts
Part Time/Coverage and Shifts
Seasonal/Needs?
On-Call Feasibility
Review of Trip Demand Data (i.e., peak times, when more resources will be needed to serve more people)
Review of Dispatch Roles and Responsibilities/Job Descriptions
Shifts/Coverage
Full Time/Part Time
Review of Call Center Roles and Responsibilities/Job Descriptions
Shifts/Coverage
Full Time/Part Time
Review of Driver Turn-over of Each Agency
Agency Hiring Practices and Human Resources Policies

Phase 5 is not about removing positions but figuring out how the current workforce would meet the demand of an integrated service. For a simplistic example, if a call center does not schedule any rides during 12pm – 12:30pm because the one driver is having a lunch break, perhaps it makes sense to look at the number of rides that could be served and determine whether it is feasible to hire a part-time driver, or determine if vehicles from other jurisdictions could meet demand during this timeframe. Another example, if the call center stops taking calls at 5pm, but the agency gets a lot of voice messages after 5pm, perhaps it is time to examine the shifts of the call takers. This phase ensures that demand-response staff meet the needs of the community and do not become resistant to change.

PHASE 6

This phase kicks in when there is a common, shared service to market and promote and around which to provide educational and training opportunities.

PHASE 6: YEAR 3
Branding/Marketing/ Education and Promotion

Background: Branding and marketing will be needed to launch the new agency's system.
Promoting the new brand can be woven into each phone call that comes into the various Call Centers, so repeat customers understand a change is coming. Below are items related to branding and marketing that need to be considered during integration.
Branding and Marketing Considerations
Phone Number Discussion
Develop a phased approach to creating one phone line as integration comes to fruition, keeping existing numbers with referral or transfer mechanisms for some period
Develop integrated service logos for brochures, websites, online reservation portals, and vehicles
Further define VCTC's Role as County Coordinator
Role of Information Technology and where functions exist for updating websites, graphics, and marketing tools
Discussion of whether to advertise demand response services versus advertising more robust fixed-route network, and the trade-off's associated with each approach
Discussion on the difference between education and advertising

Phase 6 may be implemented, in part, throughout the whole integration process as the TAC and Client Rep see fit, as it relates to promoting information about available demand-response services. For example, if it makes sense to brand vehicles at a certain time because one agency is preparing to brand its vehicles, this may offer an opportunity to develop integrated marketing and promotion tools regarding demand response services. This takes advantage of the opportunity to minimize costs, as well as to highlight and build awareness of integrated, improved demand response services.

Summarizing the Proposed Approach to Integration

This report sets forth a framework for the integration of demand response services in Ventura County, detailing expectations necessary for success, presenting early actions to improve services, describing a governance approach and detailing phases recommended for successful implementation.

Key improvements will build a foundation upon which successful integration of demand-response services can be operated. While ideally these improvements are put into place in advance of further actions towards integration, some may be arrived at or implemented as the process unfolds. These include:

- *Shifting general public riders onto fixed route services* – the overall recommendations of the SRTP will improve and enhance fixed route services, explicitly to attract more riders to fixed route.
- *Dynamic trip scheduling to improve productivity* – features of RideCo and Ecolane scheduling software greatly enhance system efficiencies and improved passenger trips per hour.
- *Policy enforcement with riders* – policies, including no-show and late cancellation, when they are not enforced contribute to the inefficient use of vehicle resources.
- *Subscription trip policies enforced* – recurring trips and their efficient scheduling can be the backbone of a demand response system but must be appropriately scheduled by dispatchers to reserve capacity to serve other trips.
- *Negotiating pick-up times with riders* – improved trip scheduling, including improved on-time performance, can be achieved with negotiated trip times, as opposed to scheduling all trips at the times – often peak periods – when riders request; the ADA allows for trip negotiation within one hour on either side of the requested trip time.
- *Structuring vehicle availability and drivers to match shifts* – Effective matching of resources with demand will increase efficiencies and productivity, contributing to decreased costs per trip.
- *Fare and fare payment* – continuing to move to unified fares and fare payment, through electronic means, will benefit riders and contribute to an integrated system.
- *Call center consolidation* – consolidation of trip reservation and trip scheduling functions will have multiple benefits with an integrated system that contribute to efficiencies, reduced costs and management of a coordinated vehicle fleet.

Two governance structures can support integrated delivery of demand response services. An initial MOU is recommended, adapting the general framework of the ECTA MOU, to use this tool to build to a fully integrated program that is governed by a JPA. The previous section examines the constraints and opportunities of both the MOU and JPA.

A phased approach to building an integrated system is proposed, over a general one-to-three-year timeframe. Six phases are presented, which are generally sequential but with some overlapping-activity. Operational components are detailed within each phase, highlighting the integration elements the operator partners will consider at each phase. The resultant integrated program is expected to keep some degree of local decision-making alongside countywide components that are standardized or managed jointly.

Roles of a Client Rep and a TAC are proposed, providing leadership and guidance throughout the integration process.

ANTICIPATED OUTCOMES OF AN INTEGRATED DEMAND RESPONSE PROGRAM FOR VENTURA COUNTY

The integrated program envisioned predicts both benefits and costs, to be further explored in the next chapters. The costs will entail staff time and decision-making around the allocation of resources for demand-response services, both vehicles and revenues. Expected benefits include improved customer experience through improved reliability and on-time service for local and regional trips. The integrated program is anticipated to achieve more efficient service, increase productivity and reduce costs per trip or per revenue mile. This helps to ensure that costs for these essential services are both sustainable and productive.

Some centralizing of demand-response program oversight through a central call center that can eventually use a shared-fleet can free up staff to focus on other transit functions. Through the SRTP process, it was clear that municipal staff must wear many hats and their opportunity to delve into the specifics of efficient demand-response program management necessarily becomes limited. Where this is left to the contractor, the tendency is simply to keep the status quo and not explore modifications or adaptations that may be indicated by dynamic scheduling software.

In recent years, the performance of most of the County's demand-response services has been sub-optimal. This is despite countywide concurrence that these are critical services and a civil right for persons with disabilities. Moving to an integrated service, designed to meaningfully complement the county's fixed route network, is expected to improve regional mobility for select groups or be provided at service levels that can continue running.

THE IMPORTANCE OF INTEGRATION AND EXPECTATIONS

Naturally, many operators may be hesitant to embrace change and may question whether these recommendations will truly lead to greater efficiency. Research on transit integration, best demonstrated in Transit Cooperative Research Program (TCRP) Report 173 "Improving Transit Integration Among Multiple Providers", is a worthwhile and relatively brief read which documents the challenges many other agencies have faced that are similar to Ventura County's experience, and the importance of building consensus and making small progressive steps as this chapter proposes.

While no single recommendation will dramatically increase the number of people served per hour—and that is not the primary goal of this study—the core purpose of this integration effort is to enhance the customer experience and better serve Ventura County's communities. For many older adults and individuals with disabilities in the County, traveling beyond their hometown is a significant challenge. Reaching medical appointments or

visiting family can be extremely difficult. At the same time, the current system is serving fewer people than it once did, at a much higher cost. If agencies are committed to meeting the evolving needs of their communities, embracing integration and exploring innovative approaches to that process may be exactly what is needed to improve the mobility of Ventura County residents who use demand-response services.

APPENDIX A - GUIDING INDUSTRY METRICS FOR DEMAND RESPONSE SERVICES

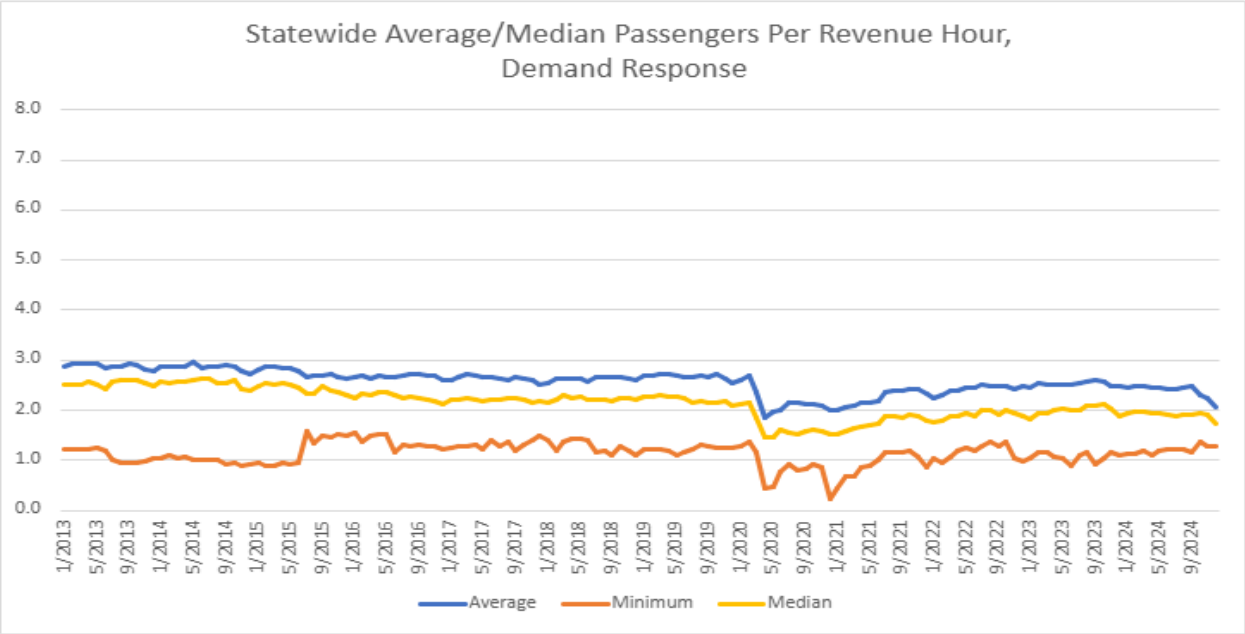
This appendix is a guide for which demand-response *operators to reference when creating their own realistic benchmarks for success in their programs. Understandably, one size does not fit all, therefore we do not want to force operators to metrics that do not make sense for them.*

However, with that said, these metrics provide a window into what operators are able to achieve, throughout the United States, as well as the State of California.

RIDES PER REVENUE HOUR

- For low-density suburban areas, on-demand services should at least strive for 2.5 – 3.5 rides per revenue hour.
- For higher-density urban/suburban areas, on-demand services should strive for 3.5 – 4 rides per revenue hour.

Below are two charts (1) State of California On-Demand Rides Per Hour Averages, and (2) State of California On-Demand Rides Per Hour Averages Excluding Large Cities. This helps show the minimum productivity that agencies should strive for.


Statewide Average/Median Passengers Per Revenue Hour,
Demand Response
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5.0
4.0
3.0
2.0
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0.0
1/2013
5/2013
9/2013
1/2014
5/2014
9/2014
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5/2015
9/2015
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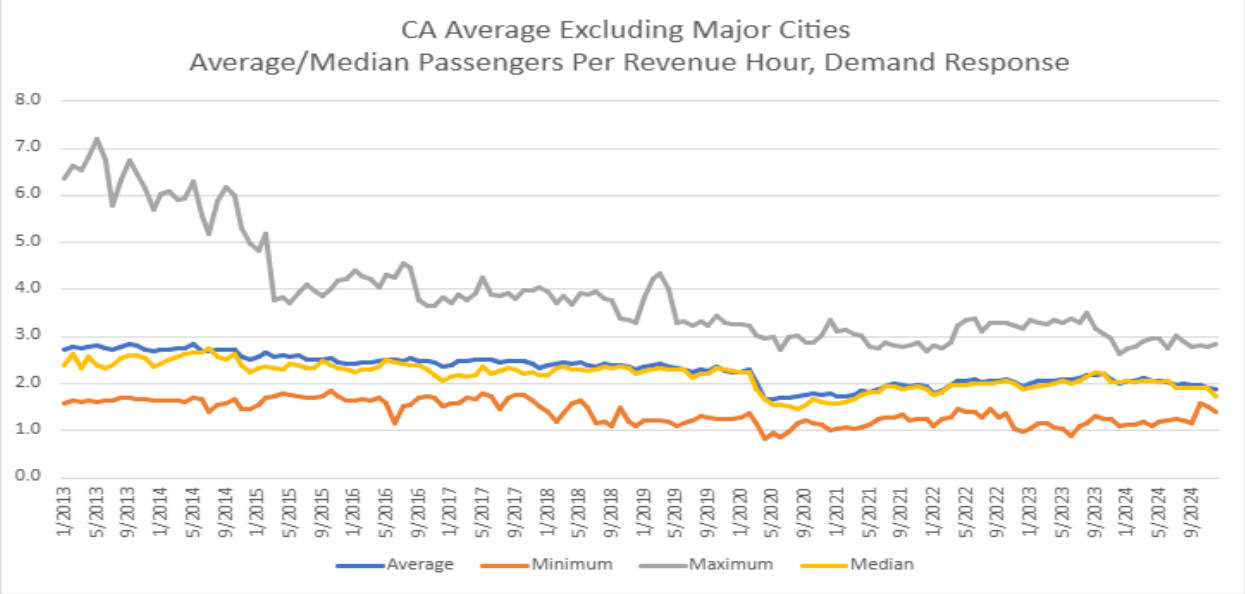
CA Average Excluding Major Cities
Average/Median Passengers Per Revenue Hour, Demand Response
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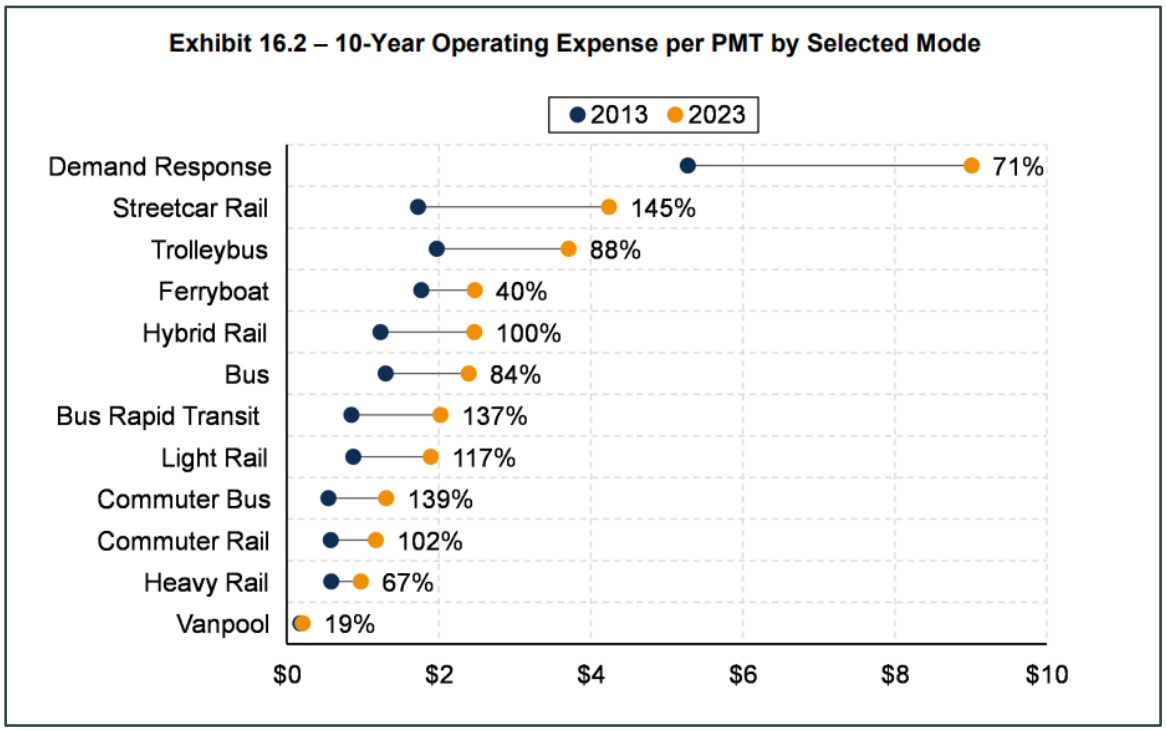
Average
Minimum
Maximum
Median

ON-TIME PERFORMANCE

- On-time performance should be met at least 90%-95% each month.

COST PER MILE

Costs for transit services have gone up dramatically after the pandemic, however the chart below from the National Transit Database shows the average Cost Per Mile for U.S. Providers[3] by mode. Demand response services should strive to cost less than $9 per mile.



[3] National Transit Database https://www.transit.dot.gov/sites/fta.dot.gov/files/2024-12/2023%20National%20Transit%20Summaries%20and%20Trends_1.2.pdf

COST PER HOUR

Below is the current Cost Per Hour for each operator. TAC will discuss realistic goals to set future Ventura benchmarks.

Demand-Response System	Cost Per Hour FY23
CAT	$148.77
Valley Express	$90.95
GCTD	$88.82
TOT	$181.52
MCT	$107.72
SVT	$264.17
ECTA	$137.37
MCT Microtransit	$104.40
Current Average	$140.47