



# AGENDA

## Access Task Force

Monday April 22, 2019 2:00 PM – 4:00 PM  
King Street Center, 8th Floor Conference Center  
201 S Jackson St, Seattle WA 98104

CALL-IN NUMBER: 206-263-8114 Conference ID: 4558828

Group members: Robert Angrisano, Dorene Cornwell, Lynn Domingo, Stacy Gillett, Amal Grabinski, Jamilah Ibrahim, Susan Koppelman, Ginger Kwan, Kimberly Meck, Debbie Meyers, Kibibi Monie, Aaron Morrow, Hadi Rangin, Jessica Renner, Joy Sebe, Mark Smutny, Harriet Williams, Steve Marquardt

### Purpose of Meeting:

- Access update
- Work plan development
- Customer service update
- Develop agenda for next meeting

Co-Facilitators: Jamilah Ibrahim and Aaron Morrow

- |         |   |
|---------|---|
| 2:00 PM | Welcome (Lorrie Alfonsi)  |
| 2:05 PM | Introduction – (Chris O’Claire and Gwen Clemens)  |
| 2:15 PM | Update on Metro Max – Same Day Pilot (Don Okazaki and Jeremy Trenhaile)                                 |
| 2:30 PM | Follow up - Customer Service transition (Greg Lerner)   |
| 2:40 PM | Access update (Ashish John)   |
| 2:55 PM | First Transit Customer Service and Operations (Tom Irvin, Karen Johnston and Lanai Tua)                 |
| 3:45 PM | Upcoming meeting times and next meeting agenda: Group discussion on May meeting and setting next agenda |
| 3:55 PM | Plus/Delta: What worked, what didn’t work   |
| 4:00 PM | Adjourn   |

## Access Task Force Meeting Minutes March 25, 2019

**In attendance:** Aaron Morrow; Kibibi Monie; Ashish John; Dorene Cornwell; Hadi Rangin; Jamilah Ibrahim; Lorrie Alfonsi; DeAnna Martin; Cindy Chen; Joy Sebe; Jeremy Trenhaile; Susan Koppelman; Ginger Kwan; Harriett Williams; Chrissy Russillo

**On phone:** Robert Angrisano; Ashish John

**Guest:** Benjamin Shabazz (Guest of Jamilah Ibrahim)

Aaron Morrow opened the meeting with introductions and announced that he and Jamilah Ibrahim are the co-facilitators.

There was a request from a member of the public to address the Task Force. The Task Force agreed to hear from Benjamin Shabazz.

Benjamin Shabazz introduced himself as the Spiritual leader of Mosque. He expressed concerns regarding trips to the Mosque where they meet. He shared that Jamilah Ibrahim's departure when their meetings are over, the building is locked up. She has to wait alone until the bus arrives. Sometimes they call, other times they don't. Their particular building has a back entrance. The drivers don't always come to the back entrance and are inconsistent as to where they meet Jamilah.

Aaron Morrow recommended that Jeremy Trenhaile will look into the issues and work with him to address it.

Aaron Morrow asked everyone to check in.

Ginger Kwan shared two things: The Metro Max program is going well and her restated interest in translation issues.

Dorene Cornwell also shared that the Metro Max program is going well. Her mom is moving, and she called a taxi and it worked well. She also shared that Metro has done a good job with the service changes.

Hadi Rangin commented on the Metro Max program that he feels that it is giving him his normal life back. He doesn't have to plan to see a friend and that he can do so spontaneously. There are some problems though, some

trips are late or don't show up, but the plan is to utilize the amount in a different way.

Harriett Williams shared that she was suspended for nonpayment of fare. She emphasized that her issue is that she doesn't always have the correct change and would like Metro to address this issue.

Robert Angrisano shared that there are still some long rides from Bellevue to Fall City. The routing takes his daughter past their house by ten miles, and then comes back to the house.

Kibibi Monie stated that she is having similar problem that Benjamin Shabazz.

Jamilah Ibrahim shared that she is having the same problems as have all been stated. Jeremy Trenhaile clarified that it's 20 per trip. You can use it and back. For example, to go to the mall is \$20, then home from the mall is \$20.

Aaron Morrow shared that he is having serious routing issues. When leaving KSC and going out to Renton, Redmond, at 9 or 8 p.m., he is being taken all over. He expressed his concern regarding routing issues. He also shared that there is a lot more traffic on Fifth Avenue, and almost got hit by an articulated bus. He sees pedestrian issues, crossings at major intersections that are not timed, and that crossing routes though the pedestrian footprint is going to be a problem.

Susan Koppelman shared that after the last meeting, the van for Jessica Renner arrived and there were two other wheelchairs on the van. The driver took another 25 minutes to make arrangements so that Jessica could board the van.

Aaron Morrow opened the floor to the election of chair and vice chair. Aaron Morrow and Jamilah Ibrahim volunteered to take on the roles for the first three months. This was approved by consensus. Hadi Rangin volunteered to chair in the next round.

#### [Access update:](#)

Lorrie Alfonsi provided an update on contract negotiations, that negotiations were almost complete but currently responding to some information requests. Metro is in a holding pattern until this request for information has been taken care of.

Aaron Morrow asked for clarification as to the request for information or is it a formal protest.

DeAnna Martin responded that this was a public disclosure request that was asked for when during the protest period.

Lorrie Alfonsi acknowledged that the August start date may be moved.

Lorrie Alfonsi moved on to the data report and mentioned that ridership is up, from January to January is a four percent increase and costs are up this year. In order to meet the on-time performance, cost have increased. Due to the snow event, the data is skewed for February.

Robert Angrisano noted that taxi has increased by 43 percent, yet the overall cost is down and Lorrie Alfonsi explained that they were initially putting the longer rides on taxi which increased the cost per ride but have changed the policy and putting shorter rides on taxi overflow.

DeAnna Martin provided a quick commission update. She shared that they are in the process of hiring a planner to staff the board. DeAnna needs to meet with the commission lead to determine what things are needed to establish before the Task Force can move forward.

### Customer Service Transit:

Chrissy Russillo, Manager of Customer Communications and Services at Metro, provided an update on transitioning the customer service and complaints to Metro.

She explained that in the current contract, the current work is handled by the contractors and the feedback from the groups believe it should be taken in-house. There was a desire to assure that the investigations were done well and tracked, including the types of complaints. Chrissy Russillo also requested that CCS attend monthly and provide updates. She also asked if the Task Force wanted a subcommittee to meet with their team.

She shared Greg Learner is the lead on the transition and he is working with Kayleen Norris. The Customer Service office currently receives complaints via phone calls, emails and the Executive. The customer service office looks at it to make sure it's valid. They work with the base chiefs and they investigate and determine if it's a good response and relayed to the customer.

With Access there's a lot of different factors that will go into it. The goal is for people to have an easier way. With that, they would like to begin mapping out the process for Access. What are the values we want? Then begin testing it. They are working on some of the technical things such as the phone system and having calls transferred over to Metro now. In April, they would like to map out the process, and determine what pieces are to improve on. By July, they would begin testing it for the August transition. It will be a lot easier when the new contractor is in place. Aaron Morrow asked if passweb was going to be rolled out in the future.

Jeremy Trenhaile responded that Access has been working on it with the current contract and have hit various roadblocks. Under the new contract there is a requirement for passweb. Aaron Morrow commented that in other systems it is very buggy. And in his opinion, it is not a good product.

Ginger Kwan asked about the mapping process and how will CCS inform the customers about this process.

Chrissy Russillo shared that these are good questions and will need some feedback. That is the purpose of the rest of the meeting.

Aaron Morrow moved to the next agenda items to break into groups and respond and think about your experiences with Access and the work plan and what is most important to you. Answer the question, "what is the most important thing to you to do the maximum change: customer services transition?"

See attached list.

### Next meeting agenda:

Follow up on discussion

Aaron Morrow, Kibibi Monie, Ginger Kwan and Susan Koppelman will be part of the subcommittee.

Hadi Rangin would like an update on the pilot, Metro max. Update on the potential delay.

Robert Angrisano would like on time performance, any window for pickup and drop off as well, and what's the average ride time, what's outside the standard.

Hadi Rangin would like a demo from Jeremy about the online reservation system.

Susan Koppelman would like to suggest we get copies of the RFP proposal; if there is a signed contract.

Jamilah Ibrahim asked about bringing in new people.

Lorrie Alfonsi responded to the request for Zoom. There is a request to upgrade the equipment in the room, that there is not a camera but we are Skype capable.

Meeting adjourned.

## Access Task Force

### Feedback for Metro Taking Customer Comments

Draft 3/25/2019

- After getting a complaint, there is follow up and actions taken
- Establish a process for responding to common issues at the individual levels and then systemically
- Provide multiple ways to submit complaints – email, web, phone
- Treat everyone equally and with respect and expect callers to be frustrated
- Log every complaint
- Have enough staff so people get their call answered within 3 minutes
- Go beyond the boiler plate letters in responding to individuals
- Center services around the customer – identify a culture and vision with customers at the center – including providing culturally and linguistically appropriate services
- Then, establish processes, protocol to meet the above
- Assure accessibility of process to multiple languages, devices, Be respectful & culturally appropriate
- Safe pick up and drop off is essential
- Need more convenient ways to pay – be flexible, convenient
- Answer the phone
- Be transparent about the process – inform customers what you're doing and will do, who will do what, and what's needed
- Need clarification on what is recorded and how to elevate complaints as necessary
- Have a communication plan for letting customers know about the changes – for them to get accustomed to the new system
- Training is critical
- Need more outreach, education to stakeholders about the services available, and how to use them
- There may be changes needed in operations to prevent complaints – e.g. switching drivers to routes every XX months – the new contractor needs to be a partner in this and open to it
- Want clarity around eligibility process – who does what, and what the customer can expect in terms of what a person qualifies for and the reasons
- Improve existing Access Handbook (Ride Guide) so it is more customer friendly and clear about people's roles and responsibilities

- Create a guide/handbook on procedures for having a complaint or commendations – getting customer service; for employees and customers
  - If things change, how will I know
  - Where do I call/contact to do what
  - Customer rights

# ACCESSIBLE SERVICES

## MONTHLY PERFORMANCE REPORT - MAR 2019

	Mar-19	Year-To-Date Total			Target
		Mar-19	Mar-18	%Change	
<b>BOARDINGS</b>					
Total Access Boardings	76,292	206,351	215,890	-4.4%	
Total Taxi Overflow Boardings	15,343	39,799	31,058	28.1%	
Total Comm. Access (CAT) Boardings	0	45,984	75,256	-38.9%	
<b>Total Boardings</b>	<b>91,635</b>	<b>292,134</b>	<b>322,204</b>	<b>-9.3%</b>	
<b>SERVICE COSTS</b>					
Access Operating Cost	\$5,028,571	\$14,279,711	\$13,304,164	7.3%	
Taxi Overflow Cost*	\$650,109	\$1,522,279	\$1,392,534	9.3%	
Community Access Cost	\$0	\$439,367	\$774,015	-43.2%	
<b>Total Transportation Costs</b>	<b>\$5,678,680</b>	<b>\$16,241,357</b>	<b>\$15,470,713</b>	<b>5.0%</b>	
Cost Per Access Boarding**	<b>\$65.91</b>	<b>\$69.20</b>	<b>\$61.62</b>	<b>12.3%</b>	
Cost Per Taxi Overflow Boarding	<b>\$42.37</b>	<b>\$38.25</b>	<b>\$44.84</b>	<b>-14.7%</b>	
Cost Per Comm. Access Boarding	#DIV/0!	<b>\$9.55</b>	<b>\$10.29</b>	<b>-7.1%</b>	
<b>Average Cost Per Boarding</b>	<b>\$61.97</b>	<b>\$55.60</b>	<b>\$48.02</b>	<b>15.8%</b>	
<b>REVENUES</b>					
Access Fares (cash only)	\$51,202	\$140,980	\$140,638	0.2%	
Estimated Pass fares**	\$45,158	\$133,916	\$123,306	8.6%	
Total Fares	\$96,360	\$274,896	\$263,944	4.1%	
<b>ACCESS PERFORMANCE INDICATORS</b>					
Accidents per 100,000 Miles	1.84	2.24	2.16	3.5%	<b>2.00</b>
Complaints per 1,000 Boardings	4.28	3.81	3.28	16.0%	<b>5.00</b>
Percent No shows****	5.61%	6.35%	6.02%	3.4%	
On-Time Performance	93.9%	93.7%	90.6%	-3.5%	<b>90.0%</b>
Rides per Vehicle Service Hour	1.52	1.48	1.53	-3.5%	<b>1.49</b>
Road Calls per 100,000 miles	0.81	0.97	0.97	0.0%	
Total Taxi Scrip Boardings	0	1,934	4,767	-59.4%	
Taxi Scrip Program Cost	\$0	\$32,537	\$73,274	-55.6%	
Vehicle Service Hours	60,238	\$165,995	\$161,488	2.8%	
<b>Same Day Cancelations*****</b>	<b>4,862</b>	<b>33,925</b>	<b>23,547</b>	<b>44%</b>	
<b>ACCESS CALL TAKING &amp; RESERVATIONS</b>					
Number of Calls Handled	32,490	92,601	83,664	10.7%	
Number of Dropped Calls*****	4,806	14,396	11,090	29.8%	
% Answered within 3 min.	96%	94%	96%	-2.5%	<b>90.0%</b>
<b>CURRENT REGISTRATION</b>		<b>New/Recert. Registrants</b>	<b>Current Registrants</b>		
	<b>Mar-19</b>	<b>Mar-19</b>	<b>Mar-18</b>	<b>%Change</b>	
ADA Registrants	394	14,229	13,894	2.4%	
Taxi Scrip Registrants	52	11,683	11,244	3.9%	
<b>Total Registrants</b>	<b>446</b>	<b>25,912</b>	<b>25,138</b>	<b>3.1%</b>	

**NOTES:**

\*Access has adjusted overflow strategy to assign shorter length trips to taxi/cabulance. Longer trips and those requiring lift use are being prioritized to be assigned to Access vehicles. It is anticipated that this will shorten on board times on Access and lower the cost per trip on overflow.

\*\*Accessible Services has implemented a decrease in system speeds and an increase in service hours to the program in an effort to improve poor on-time performance. The increase in service hours and use of taxi overflow has increased the cost per boarding. It is anticipated that this will be a continuing trend for 2018.

\*\*\*Estimated pass fares based on Trapeze reported sales

\*\*Taxi scrips for Dec include mid-November billing/count for year end

\*\*\*\*Percent No Shows is the number of rides that customers canceled on the same day divided by the total number of rides that month.

\*\*\*\*\*Same Day Cancelations are the number of trips that customers canceled after the pick-up window began, during the pick-up window or failed to meet the van at the designated pick-up point.

\*\*\*\*\*A Dropped call is a call abandoned by the customer before it is picked up.



## Access Control Center High-Level Overview

(...how the Control Center actually works)

April 2019

## Introduction (Today's Presenters)

➤ **Tom Irvin - Control Center General Manager**

- 39+ years in Transit & Paratransit operations, 6+ years with Access system
- Worked with paratransit systems in NYC, Wash DC, Orlando, Baltimore, others



➤ **Karen Johnston - Customer Service Manager**

- 20+ years in Customer Service, almost 2 years with Access system
- formerly with The Lighthouse for the Blind & with Goodwill Industries



➤ **Lanai Tua - Assistant General Manager**

- 10+ years with Access system
- formerly Dispatcher, Dispatch Mgr., Scheduling Mgr., Operations Mgr.



## Introduction (slides from Metro's "Access 101" Presentation)



## Centralized Control Center Functions

...Decentralized Operations

**First Transit Provides:**

- Reservations
- Customer Service
- Scheduling
- Dispatching
  - Incl "Overflow"
- Transit Instruction
- IT Support

**Other Contractors Provide:**

**UW / Harborview:**

- Eligibility Assessments

**Transdev:**

- 75% of Operations from 3 bases
- Drivers, Safety, Training, Supervision, etc.
- Fleet Maintenance, Cleaning, Fueling, etc.



**Solid Ground:**

- 25% of Operations from 1 base
- Drivers, Safety, Training, Supervision, etc.
- Fleet Maintenance, Cleaning, Fueling, etc.



## Metro Sets Policy

### Metro Responsibilities Include:

- **Administration & Funding**
- **Policy Decisions, System Design, Operating "Rules", etc.**
  - Service Areas & Hours of Service
  - Types & Levels of Service, Agency Agreements
  - "Comparable to fixed-route"
  - Fares & Fare Collection
- **Eligibility Decisions**
  - Including Recertification (every 3 years)
- **Customer Communications**
  - Ride Guide, Announcements, Behavioral Expectations, etc.
- **Contractual Negotiation, Administration & Oversight**
  - Provides Capital Equipment (vehicles, software, hardware, operating bases...)

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## Today's Focus Areas

### Customer Service

(approx. 10-15 minutes)

- **How it works...**
  - Reservations Process
  - Customer Comment Process
  - Administering Metro Policies for Fares, Late Cancellations, Behavior, etc.

### Scheduling & Dispatching

(approx. 10-15 minutes)

- **How it works...**
  - Scheduling Process
  - Dispatching Process
  - "Where's my ride" Response

### Q & A and Requests for Follow-Up Presentations or Discussions

(would like to leave at least 15 minutes at the end to discuss specific questions from Task Force Members)

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## Customer Service Department

### Department Profile:

- CS Manager – Karen Johnston
- 3 CS Supervisors & 2 CS "Leads"
- 27 Customer Service Representatives (CSRs)
- Avg. CSR Seniority = 4.99 years (longest tenured 18+ years)
- 7 Days/Week, 365 Days/Year
- 8:00 AM to 5:00 PM

Some additional administrative duties & "call-backs" before 8am and after 5pm



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## Reservations Process

- Approx. 1,500 – 1,800 reservations calls per day
- Avg. Call Length: 4:23
- Customers can call up to 7 days in advance for demand trips
  - Some calls can take upwards of 45 minutes + to book multiple trips.
- Goal: 90% of calls answered in 3 minutes or less (consistently performing in the 93%-95% range against this goal for past year)
- 60% of trip requests are routed by the CSR during the initial call
  - The Trapeze Software routes trips immediately & shows the CSR priority-based placements. Then the CSR negotiates the 30-minute pick-up window with the rider & confirms the details of the trip.
- Over 60% of our trips are booked the day before travel
- Over 60% of the day's calls come between 3 PM and 5 PM

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## “Customer Service” Processes

- Escalated Calls: Questions, Commendations and Complaints
  - Avg. CS Call Length: 5:11
  - CSRs attempt to research & answer questions during customer's first call
  - If unable to answer question and/or if the customer wishes to file a complaint...
  - CSRs record ALL complaints in Metro's "Action" database & assign a category
    - Top categories: Route Timeliness (35%), Professionalism (12%), Safety (10%)
  - CSR then investigates the circumstances and assigns to the appropriate party for further investigation & resolution
  - CSRs acknowledge all complaints by mailing a letter within 3 days of receipt
  - Involved provider has 5 days to investigate and respond to Control Center
  - CSRs then review the details, ask for more info if needed, and prepare a response letter to send to customer
  - Goal is to respond to customer complaints within 10 days
- Metro reviews complaint statistics as part of its monthly KPI review

## “Customer Service” Processes (partial list, continued)

- No-Show / Late Cancellation Process
  - Multi-step process incl. analysis, phone calls, warning letters, suspensions, appeals, etc.
- Fare Program & No-Pay Process
  - Multi-step process incl. analysis, phone calls, warning letters, suspensions, appeals, etc.
- Hand-to-Hand Violations Process
  - Multi-step process incl. analysis, phone calls, warning letters, suspensions, appeals, etc.
- Behavioral Letter Process
  - Multi-step process incl. analysis, phone calls, warning letters, suspensions, appeals, etc.
- Site Evaluations
- First-Time Rider Survey Calls
- Updating Addresses, ORCA Pass info, etc. into Trapeze CERT
- Pre-Authorization Calls for Eligibility Process
- Lost & Found Inquiries & Database Management

## “Customer Service” Processes (partial list, continued)

- Managing the Independent Third-Party Call Center Q.A. Reviews through The Lighthouse for the Blind
- Taking After-Hours Calls for Metro's RideShare Program
- Recording Data from Green "How are we doing?" Survey Cards
- Assisting Metro with Periodic Customer Surveys
- Helping Manage Metro's "Reasonable Modification" Requests
- Responding to Adult Protective Service Investigations
- Handling Escalated Sexual Abuse / Misconduct Allegations
- Regular Review of Scheduling Effectiveness (OTP%) by Rider
- Assisting Metro with Service Change Communications & Special Projects

“...and other duties as assigned...”

## Operations Department

### Department Profile:

- AGM – Lanai Tua / Operations Mgr. – Stephen Valenzuela
- 3 Operations Supervisors – Nora, Hany & Liberty
- Scheduling:
  - 9 Schedulers & 1 Operations Analyst
  - Avg Seniority = 8+ years (largest tenured 17+ years)
- Dispatch:
  - 26 Dispatchers
  - Avg Seniority = 7 years (largest tenured 17+ years)
- 24 Hrs./Day, 7 Days/Week, 365 Days/Year



## Scheduling Team

- 9 Schedulers & 1 Operations Analyst who...
  - Manage & Optimize Subscription Templates
    - Approx. 60% of trips are recurring 'standing orders'
  - Manage Agency Group Scheduling
    - Full Life ADH, SKCAK, Dialysis, Group Homes, etc.
  - Coordinate Out-of-County Transfer Scheduling
    - Pierce Co. Shuttle, Snohomish Co. DART, Kitsap Co. & Vashon Island Ferry Pick-Ups
  - Perform Next-Day Scheduling & Optimization
    - Approx. 4,000 - 4,500 trips are provided on a typical weekday
    - Trips go in all directions at all times of day, with many subject to "restrictions" such as vehicle capacity, mobility devices, service level (H2H, etc.), multiple "exclusions", facility rules
    - Over 60% of trips are booked the day before travel
    - Over 60% of those trips come in between 3pm and 5pm
  - Finalize Driver Manifests and Assign Trips to Overflow Providers
    - Approx. 300 Access routes are built and optimized on a typical weekday
  - Perform Analysis, Problem Resolution and Administrative Duties

## Scheduling Challenges (slide from Metro's "Access 101" Presentation)



## Scheduling Goals

### On-Time Performance

- The contractual OTP goal is 90% or better for all pickups within the negotiated window. **This does not count cancellations & no-shows.**
  - Pick-Up OTP ranges from 88% - 95%, with overall performance for most of the past 3 months above 92%
  - Drop-off OTP for trips with appointment times typically exceeds 96% - 97%

### Productivity

- We schedule to meet or exceed "PPSH" (Passengers Per Service Hour) goals set by Metro which vary but range from 1.38 - 1.52 depending on the month for 2019
  - Overall productivity has exceeded Metro goals for months, excluding snowstorms

These 2 goals generally conflict with each other.



Packing routes tightly to improve productivity causes routes to run late and OTP to drop.

Actual performance is affected by many factors incl. scheduling, ridership volume ("demand VS supply"), No-Show & Cancellation rates, traffic congestion, construction & events, weather, driver availability, vehicle breakdowns, service provider performance, passenger readiness/delays, etc.

## Scheduling Objectives

### Reasonable Ride-Times

- The goal is to be no more than the comparable travel time on fixed-route services.
  - Ride times on Access are almost always less than fixed-route no matter the distance, time of day, etc.
  - Comparison is to Metro's Trip Planner, which assumes fixed-route is 100% on-time (reality 75-80%)
  - Some rides run excessively late due to traffic jams, passenger delays, inserts from other routes running late, will-call returns, driver performance, etc. These incidents are investigated and addressed by schedulers when complaints arise.

### Reasonably Direct Routing (yet still multi-loading)

- We group rides going generally in the same direction at the same time
  - We use "backtrack" settings in Metro's Trapeze software to calibrate allowable backtracking
  - Drop-off appointment times & driver judgement may cause apparent backtracking

Minimize Distance (CWD)
Minimize Time (CWT)
Minimize Out of Way (CWOOW)
Minimize Trip Out of Way (CWTOW)
Minimize passenger Dis-board Time (CWCOT)
Maximize Same Geographic (CNGEO)
Minimize vehicle pollution (CWPOL)
Minimize Requested Time Deviation (CWRD)

Minimize Backtracking (CWBK)
Minimize Deadhead (CWDH)
Minimize Deadhead (CWDH)
Minimize Empty Seat (CWPC)

Minimize Backtracking (CWBK)

## Scheduling Step 1 – Develop Route Bids

- We develop 3 new Route Bids per year
  - Timetable generally follows U W academic calendar
    - Spring Bid: New Year's to Graduation
    - Summer Bid: Graduation to Start of Fall Classes
    - Fall Bid: Start of Fall Classes to New Year's
- Each bid involves an extensive analysis of previous years' ridership patterns to project future demand
  - We analyze the same periods for several previous years
    - Ridership by time of day for each day of the week
    - How many routes were out at what times of day, etc.
    - How did the service perform in terms of overall OTP, Productivity, Complaints, etc.?
    - What changes have occurred since then to change performance?



First Transit

## Route Bids – General Parameters

### Demand:

- Overall volume: 1,100 – 4,500 passenger trips depending on the day
- 40.0% Subscription / 60.0% Demand Response (varies)
- Approx. 62% are Lift-Use Boardings (varies)
- We are allowed ZERO denials – no "capacity constraints" (per ADA regulations & Metro policy)

### Supply:

- Vehicles: 225-325 deployed during peak periods depending on the day of the week
- Vehicle hours split proportionally between Transdev (75%) & SGT (25%) by contract
- Geographic fleet deployment doesn't always match demand for trips

First Transit

## Route Bids – Review and Approval

- We involve Operational Management in the route bid development process
  - Transdev & Solid Ground both review & suggest modifications
  - Union rules for driver shifts, breaks, etc. taken into account
  - Once "finalized", we are still adjusting to make it easier to staff
- Metro administrators analyze our work and must approve every aspect of the bid
- Must meet County expectations and budget
  - Budget hours sometimes reflect projected service reductions
  - Service hours are NOT unlimited (it's not as easy as just adding more buses!)



First Transit

## Scheduling Step 2 – Develop Run Cuts

- We provide the final Route Bid 7-8 weeks prior to it going into effect
- Operations Management divides the vehicle hours into shifts depending on union contract, operational strategy, etc.
- Bids are posted and picked at bases
  - Drivers pick by seniority, usually because of start/end times and days off
- We trust that there are enough Drivers to pick all the shifts...otherwise there are extra shifts, overtime, and potentially uncovered routes
- This process happens in every transit & paratransit system
- Transdev & Solid Ground assign the Drivers to specific routes
  - Some routes have consistent Drivers, others don't

First Transit

## Scheduling Step 3 – Book Reservations

- CSRs use the Trapeze software to place trips on routes as they are booked.
  - Routes start with Subscription trips; "Demand" trips are folded in
- The Trapeze software works to place each trip on a route and provides the CSR with the available pick-up window while the customer is on the phone.
- Customers who don't want that time can refuse, or change the time to try to get a more convenient window.
  - CSRs help to "negotiate" times to get the best ride for the customer.
- Additional routes are opened as demand requires (up to a point)
- Timing matters!
  - Earlier reservations have more room to match customer-requested times.
  - Last-minute, day-before reservations have fewer options because the available routes are more full.

## Scheduling Step 4 – Optimize Routes

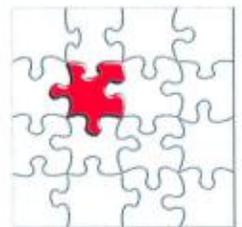
- Automated "batching" routines are used to optimize routes
  - 7 days out, 6 days out, 5 days out...all the way up to next-day
  - Each time, it shuffles trip assignments to improve schedules & create additional capacity based on software settings designed to produce best outcome
- Different settings are used for Reservations, Scheduling, and Dispatch purposes
  - Reservations Agents only receive the highest-ranked potential solution
  - Trips are generally scheduled without "violations"
  - Senior Schedulers can also run specific batches targeting certain outcomes (i.e. placement of the remaining unassigned trips)

## Daily Scheduling Process & Timeline

- During the day...Senior Schedulers are:
  - Working with & optimizing Subscription templates
  - Working with & optimizing Group trips
  - Working with Agency (such as Full Life)
  - Coordinating times for Out-of-County transfer trips
  - Working with & optimizing future Demand trips making adjustments for sporting events, demonstrations, etc.
- 5:00 PM – Reservations line closes 
- 6:15 PM – Start times are due to Service Providers
  - Service Providers then assign Drivers to specific routes
  - Drivers call in to find out their start times
  - Extraboard Drivers are used in AM to cover for call-outs

## Scheduling Step 5 – Set Tomorrow's Routes

- After 5 PM, Schedulers focus on next-day route optimization, ride-time violations, on-time projections, scrubbing routes to correct obvious errors, and assigning "leftover" trips to overflow providers based on geographic capacity
- Yes, it's like trying to put together an enormous jigsaw puzzle under some very limiting rules and with an amazingly tight deadline...day after day...and sometimes the pieces just don't all fit!

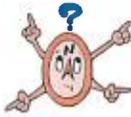


Regardless, at the end of the evening, "the plan" is set...

## Step 6 – “Live Day” Dispatching

### ➤ And once “the plan” is set, everything changes...

- 20%-22% No-Shows & Cancellations
- Traffic Delays
- Adverse Weather
- Driver No-Shows & Late Pull-Outs
- Vehicle / Mechanical Problems
- Passengers Not Ready ... (Will-Call or Return Later?)
- Passenger & Agency Delays ... (Will-Call or Return Later?)
- Running Behind... “Move my Ride” Requests
  - Note that these become “inserts” into other drivers’ manifests!



- Trust us...we would like nothing better than to have the day run as it was scheduled! But we have to adjust “on the fly” to serve all riders the best we can given the circumstances.

## “Live Day” Dispatching (Continued)

- Each Dispatcher coordinates 30-35 routes trying to stay on-time & getting drivers their breaks & lunches...often having to move trips between routes to assist those running behind, while also handling emergency situations.
- We use cabs & overflow providers as needed for isolated trips or “recovery” purposes, based on their demonstrated ability to provide good service and respond quickly
- Schedulers and Dispatchers are charged with balancing safe & on-time customer service with efforts to maximize productivity (Passengers Per Service Hour – PPSH)

## “Where’s My Ride?”

- We have 2-4 “Assistant Dispatchers” dedicated to answering customer calls (the “Where’s my ride?” calls)
  - These Dispatchers are able to look up the ride, check the route, see the vehicle’s position, contact the Driver, determine the vehicle’s E.T.A. to the customer’s location, etc.
- This allows the Route Dispatchers to focus on assisting the Drivers to keep their routes on-time
- The same E.T.A. information is available through the automated Access Ride Line or online (...without waiting on-hold!)

To Check On The Phone  
Call Access at 206-205-5000  
At the main menu, press 1  
When prompted, enter your Rider ID Number & press #  
When prompted, enter your Year of Birth



To Check On Line:  
go to <http://firsttransit.wa.gov/intermodalaccess/TA>  
click on the Live Chat Bar  
enter your Rider ID Number  
enter your Year of Birth



## “Where’s My Ride?” (Continued)

- With the popularity of cell phones, the volume of “Where’s my ride?” calls continues to grow
- Dispatch Phone Statistics (2018):
  - Total Calls: 497,347
  - % Answered in < 3 min : 92.57%
  - Avg Hold Time: 0.39
  - Avg Talk Time: 1.41
- Dispatchers are multi-taskers and often need to put callers on hold to look at the route or call the Driver & find out the status of ride
- Only 1-2 “Graveyard” Dispatchers on-duty from 10 PM to 4 AM



