It is the Mission of the Ann Arbor Area Transportation Authority to provide accessible, reliable, safe, environmentally responsible, and cost-effective public transportation options for the benefit of the Ann Arbor Area Community.

Agenda
Thursday, October 16, 2014
Ann Arbor Area Transportation Authority
Board of Directors Meeting
Ann Arbor District Library, 343 South Fifth Avenue, Ann Arbor, Michigan, 6:30 p.m.

1.0 Public Hearing – None Scheduled

2.0 Communications and Announcements

3.0 Public Time – Comment on Agenda Items

4.0 Review and Approval of Minutes
- 4.1 Review and Approval of Minutes of September 29, 2014 (p. 1-19)

5.0 Board and Staff Reports
- 5.1 Chief Executive Officer (p. 20-24)
- 5.2 Planning and Development Committee (p. 25-33 and Attachments)
- 5.3 Performance Monitoring and External Relations
- 5.4 Local Advisory Council

6.0 Question Time

7.0 Old Business

8.0 New Business
- 8.1 ARide Contract (p. 34-72)
- 8.2 Maintenance and Purchasing Software (p. 73-77)

9.0 Public Time

10.0 Adjourn

It is the Mission of the Ann Arbor Area Transportation Authority to provide accessible, reliable, safe, environmentally responsible, and cost-effective public transportation options for the benefit of the Ann Arbor Area Community.

Proposed Minutes
September 29, 2014
Ann Arbor Area Transportation Authority
Board of Directors Meeting
Ann Arbor District Library, 343 South Fifth Avenue, Ann Arbor, Michigan, 6:30 p.m.

Board Members Present:	Susan Baskett, Eli Cooper, Anya Dale, Sue Gott, Larry Krieg, Eric Mahler, Gillian Ream Gainsley, Charles Griffith
Absent with Notice:	Jack Bernard, Roger Kerson
Staff Present:	Michael Benham, Terry Black, Ron Copeland, Michael Ford, Bill De Groot, Dawn Gabay, Ed Robertson, Mary Stasiak, Elizabeth Tibai, Phil Webb, Chris White, Michelle Whitlow, Reggie Whitlow
Recording Secretary:	Elizabeth Tibai

Chairman Charles Griffith declared that a quorum was present and called the meeting to order at 6:31 p.m.

1.0 Public Hearing – Federal Program of Projects

There was no public hearing scheduled.

2.0 Communications and Announcements

Board Chair Charles Griffith explained that the September Board Meeting was originally scheduled for Thursday, September 25. He hoped that all attendees and Board members were able to adjust their schedules for the change. He also noted that a resolution for an Interim Chief Executive Officer was added to the meeting agenda.

3.0 Public Time – Comment on Agenda Items

Thomas Partridge appeared before the Board. Mr. Partridge hopes that with the start of the new Fiscal Year that the budget is expanded to include more attention to senior citizens and those with disabilities. He stated that the amount of money budgeted for Senior Ride and ARide is not sufficient to fill the need. Mr. Partridge would like the AAATA Board to give priority to the above stated areas. He noted that seniors and those with disabilities are suffering because their needs are not being met. Now is the time to allocate more money and priority to these two important programs. Mr. Partridge noted that current vehicles used for these two programs are not meeting the rider needs and have too high mileage. There is no reason a person should be picked up with a vehicle that has 300,000+ miles and Mr. Partridge is calling for reform.

Jim Mogensen prepared comments relating to the Title VI plan and provided them to the recording secretary to include in the minutes. Mr. Mogensen's comments are attached to the minutes. The Title VI program includes maps for minorities and groups all of the minorities together. Mr. Mogensen believes there is a history of racism in the county and created maps with the minority classes separated to further emphasize. He also discussed the proposed headway standard. After meeting with AAATA staff, the 60 minute headway standard was revised to 30 minutes for peak weekday and 60 minutes in the evening and weekends. Mr. Mogensen originally proposed a 30 minute headway all weekday and would still like to see the standard in place. It was noted that several routes would not meet this standard such as #13, #22 and #14.

No one further appearing, Mr. Griffith declared Public Time closed.

4.0 Review and Approval of Minutes

4.1 Review and Approval of Minutes of August 21, 2014

Gillian Ream Gainsley moved approval of the minutes as written with support from Eric Mahler. The motion carried. Susan Baskett and Eli Cooper abstained.

5.0 Election of Officers-Term of Office October 1, 2014-September 30, 2015

5.1 Election of Board Chair, Treasurer and Secretary

Eli Cooper reported that the full Board recommended Susan Baskett for Secretary, Eli Cooper for Treasurer and Charles Griffith for Board Chair. Mr. Cooper noted that the Authority is going through changes with Michael Ford joining the RTA and the continued search for a new CEO. He expressed the desire of the Board to maintain stable relationships and operations throughout the transition period.

Eli Cooper recommended approval of the motion with support from Sue Gott.

The motion carried.

5.2 Local Advisory Council Liaison Appointment

Charles Griffith recommended Jack Bernard, the current LAC liaison, to continue serving on the LAC.

5.3 Washtenaw Area Transportation Study Policy Committee Appointment

The Washtenaw Area Transportation Study Policy Committee reviews all transportation projects throughout the county. Charles Griffith has been representing the AAATA Board by serving on the committee over the last year. This year, Mr. Griffith recommended Larry Krieg to be appointed as the Board representative for this committee. Dr. Krieg has attend several WATS Policy Committee meetings and is familiar with the structure.

Dr. Krieg formally accepted the position.

6.0 Board and Staff Reports

6.1 Chief Executive Officer

Michael Ford referred to his detailed written report included in the Board packet. Mr. Ford highlighted that as of Monday, September 22, the AirRide bus stop at DTW McNamara terminal has relocated from International Arrivals to the Ground Transportation Center (GTC). Mr. Ford emphasized that the move was implemented by DTW and the Wayne County Airport Authority. He assured the Board that staff is working with all partners to continue providing excellent service and to maintain on-time service at the new location. Mr. Ford reported that there have been numerous complaints/ comments received regarding the bus stop location change.

6.2 Planning and Development Committee

Sue Gott reported on the September Planning and Development Committee meeting. The committee moved forward a recommendation for a meeting calendar for the upcoming year. However, the committee agreed that the schedule may need to be changed based upon potential committee member reassignments for FY15. The committee discussed the BTC walkway to be constructed between 4th and 5th avenues. The DDA has contributed $250,000 toward the project. The committee also discussed the FY15 budget and recommend their support.

The committee discussed the need for a formal change process for any suggested changes to the Five-Year Transit Improvement Plan (5YTIP). Ms. Gott noted that Authority staff are working on a draft change process for Board review. The committee received a presentation from Felix Carreon III regarding hybrid and low emission diesel buses. The Authority would need to reduce service on the streets in order to purchase hybrids for the 5YTIP. Options for a blended fleet were also discussed. The committee expressed interest in an overall environmental policy for the Authority. Ms. Gott requested the Board to think about what type of public comment process would be appropriate in developing the policy.

6.3 Performance Monitoring and External Relations Committee

Chris White reported on the September Performance Monitoring and External Relations Committee meeting. The committee recommended support of a revised Community Donation Program. The revisions include an updated donation amount to coincide with the fare increase from several years ago and a provision to move $2,000 in funds over from the Match component to the Non-Match component of the program. Staff will then work over the next year to develop more stringent criteria for the Program. The committee also recommended approval of a resolution for the Title VI Program submission. The resolution was amended to include a phrase for acknowledgement of corrective action thus noting that there are areas in the Program that need additional work.

Mr. White noted that Route 46 is performing well for a recently implemented service. The Route is averaging 156 riders per weekday or 12 passengers per service hour. The committee set meeting dates for FY15 which are subject to change based upon potential committee member reassignments. The committee also discussed the effects of construction and local events on the performance of routes.

6.4 Local Advisory Council

Rebecca Burke reported that the LAC received updates to the website and current accessibility challenges. The committee is working with Mary Stasiak and Don Kline to address issues as they arise.

6.4.1 Executive Committee Appointments

Rebecca Burke reported on the Local Advisory Council (LAC) September meeting. The LAC recommended reappointments for the current officers:

- Rebecca Burke
- Cheryl Weber
- Jody Slowins
- Elizabeth Aldridge
- Clark Charnetski (AAA1B Perpetual Representative)

Larry Krieg moved approval of the recommended reappointments with support from Anya Dale.

The motion carried.

7.0 Question Time

Michael Ford reported that the Authority has an annual opportunity to discuss, and participate in the development of, construction projects with City project managers. Chris White emphasized that AAATA has a good relationship with the Cities of Ann Arbor and Ypsilanti and the Michigan Road Commission. He noted that the Authority will give riders information on anticipated detours or road closures once information is available.

Susan Baskett asked for recommendations to improve the timeliness for Route 5. The route has been under detour because of construction on Stone School Road. Mr. White noted that when AAATA creates a bus detour, the intention is to keep the same detour throughout the duration of the construction project to maintain consistency and transparency with the riders. However, it is not always possible to keep the same detour. Mr. White clarified that Authority staff made the decision to provide service northbound on Route 5 while the #5 toward Ypsilanti is on detour. Ron Copeland reported that the route is running about 75% on-time. The project is expected to be complete in a month and a half.

Mr. Ford noted that the Authority is taking several advance precautions for this coming winter. The Authority is holding internal meetings and has met with Steve Powers. Mr. Ford noted that AAATA is coordinating with the City to create a joint public announcement regarding winter service. Staff is also providing community outreach and engagement on many topics, including winter operations.

Charles Griffith asked about Jim Mogensen's concerns regarding the Title VI Program submission. Mr. White reported that Jim wanted to see a headway standard of every 30 minutes. Based upon his comments, the Authority changed the headway standard from 60 minutes to 30 minutes during peak weekday and 60 minutes every evening and on the weekends. The level of service on some routes (13, 15 and Route O) does not warrant a 30 minute headway. Mr. White noted that whether or not there is a headway standard, it does not affect the Title VI submission.

Mr. White emphasized that through PMER, a clause was added to the Title VI resolution noting that there are areas that need to be addressed and/or require further follow-up.

8.0 Old Business

Eric Mahler moved the following resolution with support from Eli Cooper.

8.1 Approve Submission of Title VI Program to Federal Transit Administration

WHEREAS, the AAATA provides programs and services without regard to race, color, or national origin in accordance with Title VI of the Civil Rights Act, and

WHEREAS, the AAATA is required to prepare a Title VI Program every three years for submission to the Federal Transit Administration (FTA), and

WHEREAS, staff has prepared the required submission in accordance with FTA Circular 4702.1B, and

WHEREAS, the AAATA Board has received the Title VI Program for review prior to submission, including the results of the service standard monitoring program which the Board has considered, reviewed the results, and approved the analysis, and

WHEREAS, the adopted 5-Year Transportation Improvement Program (5YTIP) will address the disparate impacts identified in weekday headways, and staff will review the frequency, severity, and duration of standing loads on specific trips on four routes to make recommendations for any needed corrective action,

NOW, THEREFORE, BE IT RESOLVED, that the Ann Arbor Area Transportation Authority Board of Directors hereby approves submission of the Title VI Program to the Federal Transit Administration.

The motion carried.

9.0 New Business

Sue Gott moved approval of the FY2015 Board Meeting Schedule with support from Larry Krieg.

9.1 Approve FY2015 Board Meeting Schedule

Thursday, October 16, 2014

Thursday, November 20, 2014

Thursday, December 18, 2014

Thursday, January 15, 2015

Thursday, February 19, 2015

Thursday, March 19, 2015

Thursday, April 16, 2015

Thursday, May 21, 2015

Thursday, June 18, 2015

July 2014 – No Scheduled Meeting

Thursday, August 20, 2015

Thursday, September 17, 2015

All FY2015 Board meetings will be scheduled to begin at 6:30 p.m.

The motion passed unanimously.

9.2 Approve FY2015 Budget

Eli Cooper complimented Michael Ford, Phil Webb and all Authority staff for excellent budget preparation and communication. He expressed appreciation for the substance of the budget, as well as the care and attention given to Board members during the budget process.

Eli Cooper moved the following resolution with support from Larry Krieg.

Adoption of FY 2015 Operating Budget

WHEREAS, the Ann Arbor Area Transportation Authority (TheRide) is required to develop and present to the Board of Directors (Board) a balanced operating budget on or before September 30 for its next fiscal year, which begins on October 1, and

WHEREAS, on September 9, 2014, the Planning and Development Committee (PDC) and TheRide Staff completed a balanced operating budget for FY 2015 for presentation to the Board that maintains and improves TheRide's core services, properly funds the FY 2015 Work Plan (adopted by the Board on August 21, 2014), and

WHEREAS, the FY 2015 operating budget continues the implementation the first year of the Five Year Transit Improvement Program (5YTIP), which began on August 24, 2014 and implements the second year of the 5YTIP, scheduled to begin on August 30, 2015, now therefore

IT IS RESOLVED, that the FY2015 Operating Budget of $37,190,894 is hereby approved to become effective October 1, 2014, and that the budget is assigned to the Performance Monitoring and External Relations Committee (PMER) for appropriate monitoring.

The motion carried.

9.3 Approve Revised Community Donation Program

Gillian Ream Gainsley questioned if the following were considered when creating the revised community donation program:

1. Lowering the amount available to each organization applying for Non-Match
2. Creating a partial match to encourage programs to apply

The resolution was prompted because the Non-Match program funds have been expiring one month into the fiscal year. Mary Stasiak reported that with the start of the new fiscal year, there was not enough time to explore all of the options for the program. The current resolution is providing short term solutions so that staff can use the next year to take a closer look at the program and research more robust solutions.

Larry Krieg moved the following resolution with support from Anya Dale.

Revision of Community Donations Policy

WHEREAS, the Ann Arbor Area Transportation Authority (AAATA) desires to revise the Community Donations Policy for providing fare media donations to organizations that offer programs and services consistent with the priorities identified by the Washtenaw Community Collaborative and/or the Washtenaw United Way, and

WHEREAS, AAATA staff have developed a Community Donations Issues Analysis consistent with AAATA financial resources and encouraging organizations to leverage existing transportation funds,

NOW, THEREFORE, BE IT RESOLVED, that the AAATA Board of Directors does hereby agree that the Community Donations Policy be revised in accordance with the following staff recommendations made in the Community Donations Issues Analysis:

- Increase the Community Donations allotment amount per organization applying for Match Funds from $100 to $150, while keeping the overall policy budget at the same $10,000 total level.
- Transfer $3,000 in Community Donations from the Match to the Non-Match program, for FY2015 adjusted totals of $2,000 Match and $8,000 Non-match media donation equivalencies.
- Request AAATA staff to re-evaluate long-term solutions for the Community Donations program with board review and prospective implementation in FY2016.

Be It Further Resolved that the AAATA Board of Directors reserves the right to provide assistance beyond the policy for special circumstances, with any additional implementation, pending legal approval.

The motion carried.

9.4 Appointment of Interim Chief Executive Officer

A search committee was formed to guide the process of obtaining a new CEO. The Governance Committee felt it was important to bring in an Interim CEO (Robert Guenzel) to help support staff and oversee day-to-day operations. Mr. Guenzel has experience working with large and complex organizations and is able to maintain the Authority's strong external relationships throughout the transitional period. Eric Mahler questioned if the candidate has any transportation experience. Charles Griffith responded that he does not know if he has transportation experience but emphasized that the Governance Committee is interested in his executive management skills.

Eric Mahler questioned why the Board did not consider someone internally or someone familiar with the transportation industry. Sue Gott felt confident in the Authority staff to run the day-to-day operations during the transitional period. Larry Krieg noted that Mr. Guenzel is very familiar with Washtenaw County and would be a good fit. It was noted that Mr. Guenzel may not have transportation

experience but is familiar with the AAATA and co-chaired the Financial Task Force (FTF).

Susan Baskett requested a list of duties and responsibilities for Mr. Guenzel. The resolution will allow the Board to meet with Mr. Guenzel to jointly develop his duties as the part-time Interim CEO. Mr. Mahler wondered if the Authority would need to hire more staff since the Interim would be hired on a Part-time basis. It was noted that the Authority moved forward with an internal Interim CEO for two years prior to Michael Ford joining the organization. Mr. Cooper noted that the Authority staff members are well equipped to handle operations during the interim period but may need additional support with external relations. Mr. Mahler noted that from the conversation, the Board should hire a Part-time external relations person rather than an Interim CEO. He does not think the decision was thought through but he supports the motion if it is supported by staff. He would like to see Full Board and staff involvement on the decision, not just involvement from the Governance Committee.

Larry Krieg reported that Mr. Guenzel will bring more to the organization than just acting as a public relations liaison. Externally, he will be someone the county will trust and internally, he will act as the Interim CEO. Dr. Krieg recommended moving the clause regarding 'part-time' to the *NOW THEREFORE* clause in the resolution.

Sue Gott moved the resolution with the following changes to the second BE IT FURTHER RESOLVED clause (BE IT FURTHER RESOLVED that as part of the process for hiring ***a part-time*** Interim CEO, ***to commence duties on October 13, 2014***, the Governance Committee…) with support from Larry Krieg.

<u>Appointment of an Interim Chief Executive Officer</u>

WHEREAS**,** the Chief Executive Officer (CEO) position of the Ann Arbor Area Transportation Authority (AAATA) will be vacant on October 21, 2014, and

WHEREAS, the Board of Directors (Board) desires to assure a smooth transition and to support its staff as the Board fills the CEO position to allow a seamless change in AAATA's chief executive management, and

WHEREAS, the Board of Directors believes that hiring an Interim CEO would assist with this transition and assure the community of the AAATA's ability to deliver on its promises of increased service pursuant to the recent Transit Improvement millage; and

WHEREAS, the Governance committee has discussed the role of Interim CEO with Robert Guenzel, former County Administrator, and highly recommends him for this position on a part-time basis for up to 6 months;

NOW THEREFORE, BE IT RESOLVED that the Board hereby supports hiring a part-time Interim CEO, to commence duties on October 13, and authorizes the Governance Committee to negotiate a contract with Mr. Guenzel, and

BE IT FURTHER RESOLVED, that the contract for an Interim CEO not exceed $75,000, without further approval by the Board, and

BE IT FURTHER RESOLVED that as part of the process for hiring an Interim CEO, the Governance Committee will define a designation of duties between the current AAATA executive management and the Interim CEO in accordance with Board and Authority priorities.

The motion carried.

Mr. Griffith reported that the CEO Search Committee released the RFP for a search firm, but did not get any responses. The RFP will be re-released with a more relaxed timeline which includes time to publicize the RFP and conduct outreach to the vendors who did not respond the first time. The Search Committee is hoping to have a search firm in place by mid-November. The committee hoped for a more condensed timeline but decided more time was necessary. Mr. Mahler noted that from this point, the committee plans to move expeditiously in the search process.

10.0 Public Time

Jim Mogensen appeared before the board. He thanked board and staff members for talking with him regarding the Title VI Program Submission and implementing some of his suggestions into the plan. Mr. Mogensen also mentioned that the September board meeting, originally scheduled on Thursday, September 25, was to occur on the holiday Rosh Hashanah. He would like staff to keep all holidays in mind when scheduling public meetings. Mr. Mogensen stated that the MRide pass is why the University is paying less for fares. His understanding is that transit service has local contributions, Federal and State monies, and some revenue from advertisement. The third party organizations are not paying the local municipality share. He would like to see renegotiation of the MRide contract to have the University pay the full cash fare.

Allen Bernard appeared before the board. He lives at the University Townhouses and his family frequently uses Route 5. The detour changes on Route 5 have effected them greatly and will even more once the direction of the detour changes. His daughter

attends Community High School and he lamented that she will not be able to make it in time for classes to begin at 8am. His neighbors go to the Bryant Community Center and had difficulty understanding the detour changes that were posted on the evening of Friday, September 26. Mr. Bernard reported that the changes were posted, in English only, on a tiny 8 ½ by 11 yellow paper near the boarding sign. AAATA learned of the changes two days previously. Mr. Bernard stated that the Authority needs to meet with planners at the transportation organizations more than once a year. He recommended that, during the Route 5 detour period, the Authority should operate a circulator at the south end to pick up passengers left on Platt and Packard; the circulator could then be reversed in the spring.

Thomas Partridge appeared before the board. He doesn't think the resolution to hire an Interim CEO was well thought through and he thinks that Mr. Guenzel needs a list of duties prepared before being hired. Mr. Partridge stated that it is a critical fault that no one on the board gives priority to persons of disability or senior citizens beyond the routine things. He noted that there are inadequate vehicles on the road and if an analysis was done, he doubts it would be commendable. The vehicles have thousands and thousands of miles on them and should not be on the road. It is Mr. Partridge's hope that these discussions would take priority.

With no one further appearing, Charles Griffith declared Public Time closed.

11.0 Adjourn

Charles Griffith moved to adjourn the meeting with support from Gillian Ream Gainsley.

The motion carried and the meeting adjourned at 8:10 p.m.

Respectfully Submitted,

Anya Dale, Secretary

Comments on:
Ann Arbor Area Transportation Authority
Title VI Update
September, 2014

by James Mogensen
September 29, 2014

General Requirements

Title VI Notice to the Public page 5
Attachment A - Includes a copy of the notice and a list of locations where posted.
Comments: *None*

Title VI Complaint Procedure page 6
Attachment B - Includes a copy of the complaint procedure.
Comments: *Need to make sure that the job category exists during transition periods.*

Title VI Complaint Form page 8
Attachment C - Includes a copy of the complaint form.
Comments: *The complaint procedure acknowledges the potential for "general allegations – e.g. regarding service design or fares" but the form - which follows the FTA version- doesn't accommodate this type of complaint very well.*

List of Transit-Related Title VI Investigations, Complaints, and Lawsuits
Since the last Title VI Program submission in December, 2011 there have been no Title VI investigations, complaints, or lawsuits.
Comments: *None*

Public Participation Plan page 11
Attachment D - Includes a copy of the public participation plan with outreach efforts since the last Title VI Program submission in December, 2011.
Comments: *The public has the opportunity to comment on issues at the regularly scheduled Board of Directors meeting but it is limited to three minutes on agenda items at the beginning of the meeting and three minutes for any item at the end. This report was passed onto the Board through two daytime committee meetings only one of which is open to the public. The AAATA staff are very helpful to the "regulars" (this includes me) but the information on the website is hard to find if you don't already know where it is. Proposed service changes are very well publicized and AAATA makes an extra effort to reach out to riders.*

Language Assistance Plan for Persons with Limited English Proficiency (LEP) page 23
Attachment E - Includes a copy of the current LEP plan.
Comments: *This section is very well done. How the AAATA determines the population of the service area is never well described. It should be noted that the AAATA has not received any requests for additional assistance for LEP persons. Whether this is because there are no problems or if people don't really know that assistance is available is unclear.*

Membership of Non-elected Committees and Councils page 36

Attachment F - Includes a table depicting the composition of non-elected committees and councils, the membership of which are selected by the AAATA, as well as a description of the selection process.

Comments: *None*

Title VI Monitoring of Subrecipients

The AAATA does not have any subrecipients.

Comments: *None*

Title VI Equity Analysis for Facility Location

The AAATA has not selected a location for a facility since the last Title VI submission in December, 2011, and is not in the process of doing so. A decision to locate a second bus storage facility in the Ypsilanti area may be made in the next three years. If so, an equity analysis will be conducted before site selection.

Comments: *None*

Review and Approval of Title VI Program Submission page 37

Attachment G - Includes a copy of the resolution by the AAATA Board of Directors approving the Title VI Program submission**.** This resolution documents Board review and approval of results from the Service Standard and Policies Monitoring analysis.

Comments: *There needs to be a narrative of the steps involved in approving the parts of the Title VI program. In addition, there should be incorporation of any comments received into the body of the plan document. Minutes should include more than just a copy of the Board resolution.*

Requirements of Transit Providers for Large Urbanized Areas

Service Standards and Policies page 39

Attachment H - Includes revised service standards and service policies.

Comments: *I believe that the service frequency standard for local fixed-route service should be every 30 minutes during daytime weekday service and every 60 minutes on evenings and weekends.*

Demographic and Service Profile page 43

Attachment I - Includes demographic and service profile maps and charts**.**

Comments: *Given the history of structural racism in the Ann Arbor/Ypsilanti area it is astonishing that the AAATA did not include maps breaking out the minority racial groups (e.g. African American, Asian). The maps in the LEP section illustrate the strong pattern of Asians living in Northeast Ann Arbor. When you only include maps labeled "minority" you don't present an adequate picture of the racial patterns in the AAATA service area. The AAATA may choose to combine them for route analysis but also need to include the breakout by different racial groups to provide a clearer picture Note that there is a difference in population estimates (Total population 204,079 in LEP section(page 24) ; 164,543 for minority (page 47); and 149,789 for low-income). The reasons for these different estimates of total population need to be explained in a clearer manner. The population for which total and minority counts are made should be available at the block level.*

Demographic Ridership and Travel Patterns page 48

Attachment J - Includes ridership and travel pattern information based on data from an on-board survey of riders in October, 2013.

Comments: *Glad that this information has been made available to the general public with this report.*

Service Standard and Policies Monitoring page 57

Attachment K - Includes results of the monitoring program for the Service Standards and Policies. The evidence that the board considered, and approved the results of the analysis is included in the Board resolution in Attachment G.

Comments: *There should have been an additional analysis of my proposal for 30 minute weekday service with 60 minute service weekday evenings and on weekends. Only a few of the Ann Arbor Routes don't meet this service standard and all have legitimate business reasons why they don't meet the standard. I have included 4 maps that overlay Census 2010 data on African Americans with AAATA bus routes.*

Major Service Change, Disparate Impact, and Disproportionate Burden Policies page 71

Attachment L - Includes a copy of each of the policies and the Board resolution adopting the policies. The attachment also includes a description of the public engagement process during the development of the policies.

Comments: *Note that the setting of service <u>standards</u> is not included as a separate policy process from the Title VI Plan process.*

Service and Fare Equity Analyses page 89

Attachment M - During the period since the last Title VI Program Submission in December, 2011, the AAATA adopted and implemented a fare change for commuter service routes (#710 and #711) and major service changes in January 2013, August 2013, and August 2014. A copy of the equity analysis for each and the Board resolution adopting the change including acknowledgment of the equity analysis is included.

Comments: *Not all of the analyses have been readily available to the general public.*

<u>Comment Attachments</u>

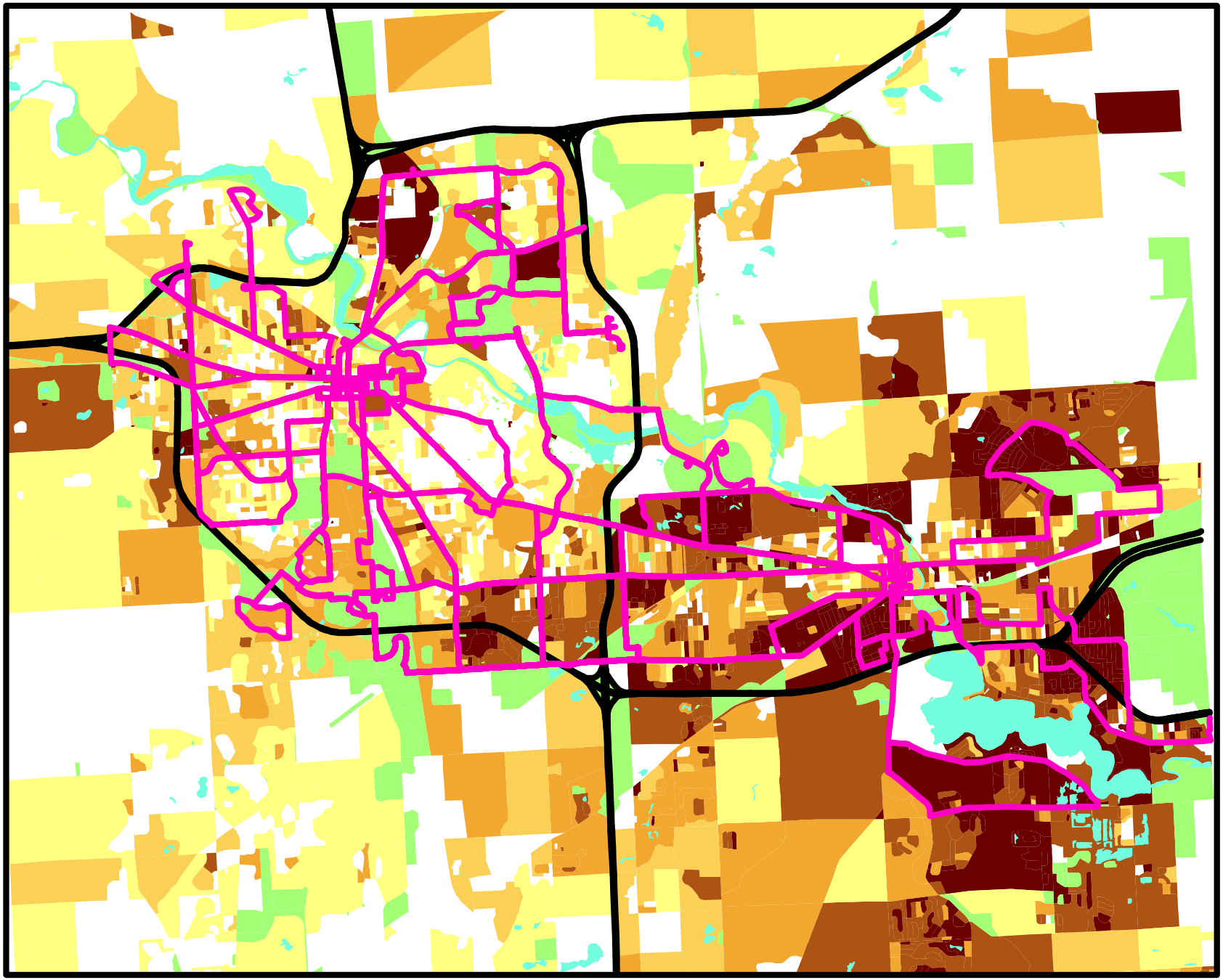
Map #1. AAATA August 2014 Routes with Census Data – African American

Map #2. AAATA August 2014 Fixed Routes with Census Data – African American and Headway Information

Map #3. AAATA Five Year Transit Improvement Plan (FYTIP) Fixed Routes with Census Data – African American

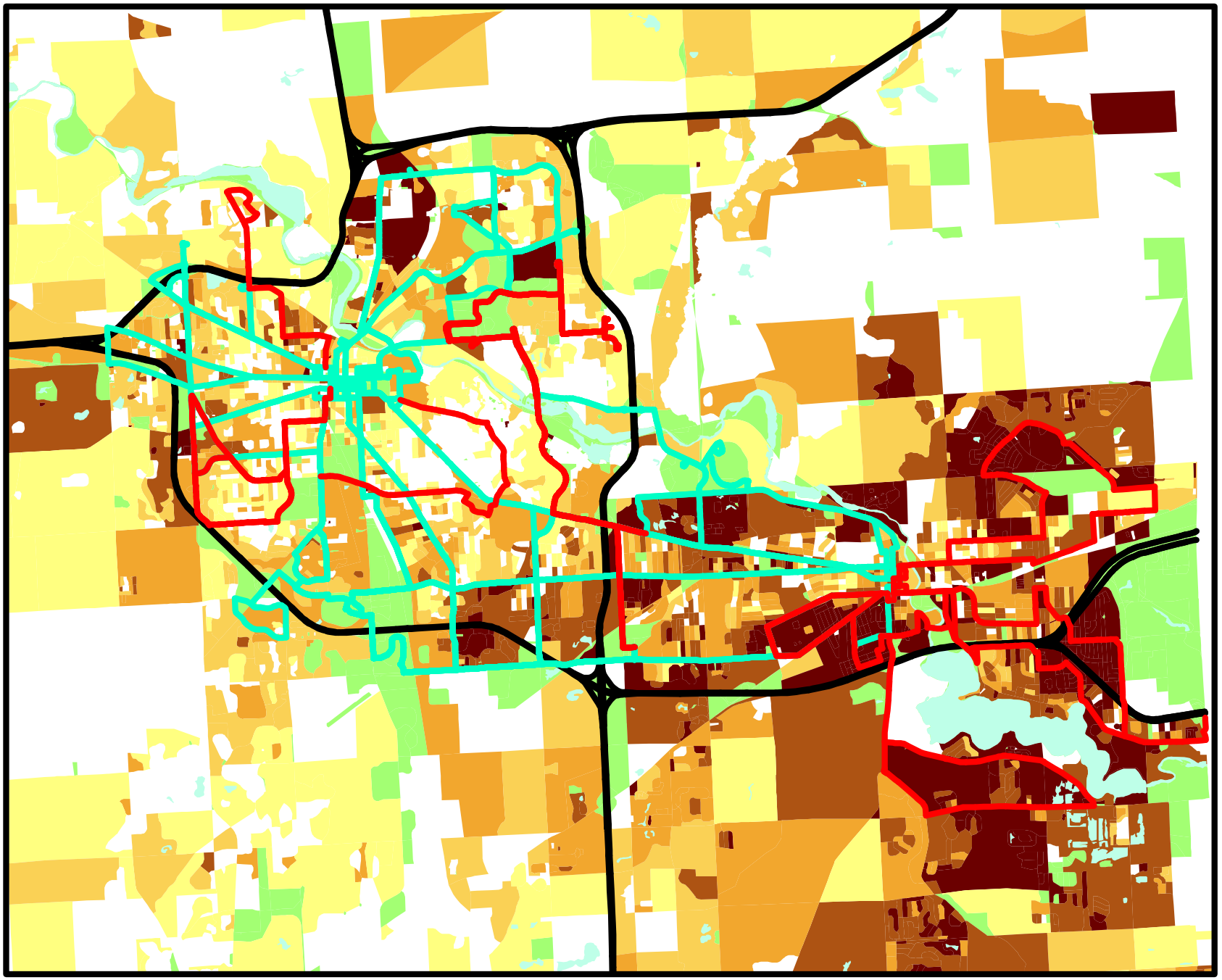
Map #4. AAATA FYTIP Fixed Routes with Census Data – African American and Headway Information

Map #1. AAATA August 2014 Routes with Census Data - African American



Data Source: Census Blocks 2010 SF1 Created by Jim Mogensen
September 2014

Map 2. AAATA August 2014 Fixed Routes with Census Data - African American and Headway Information
Buses come more than every 30 minutes apart in Red (Ann Arbor Routes 2C,13,14,15,22 Ypsilanti Routes 10,11,20,46)
Buses come every 30 minutes in Blue (All other Routes)



Legend

- Headway Greater than 30 minutes
- 30 Minute Headway
- Highway
- Water

Percent African American

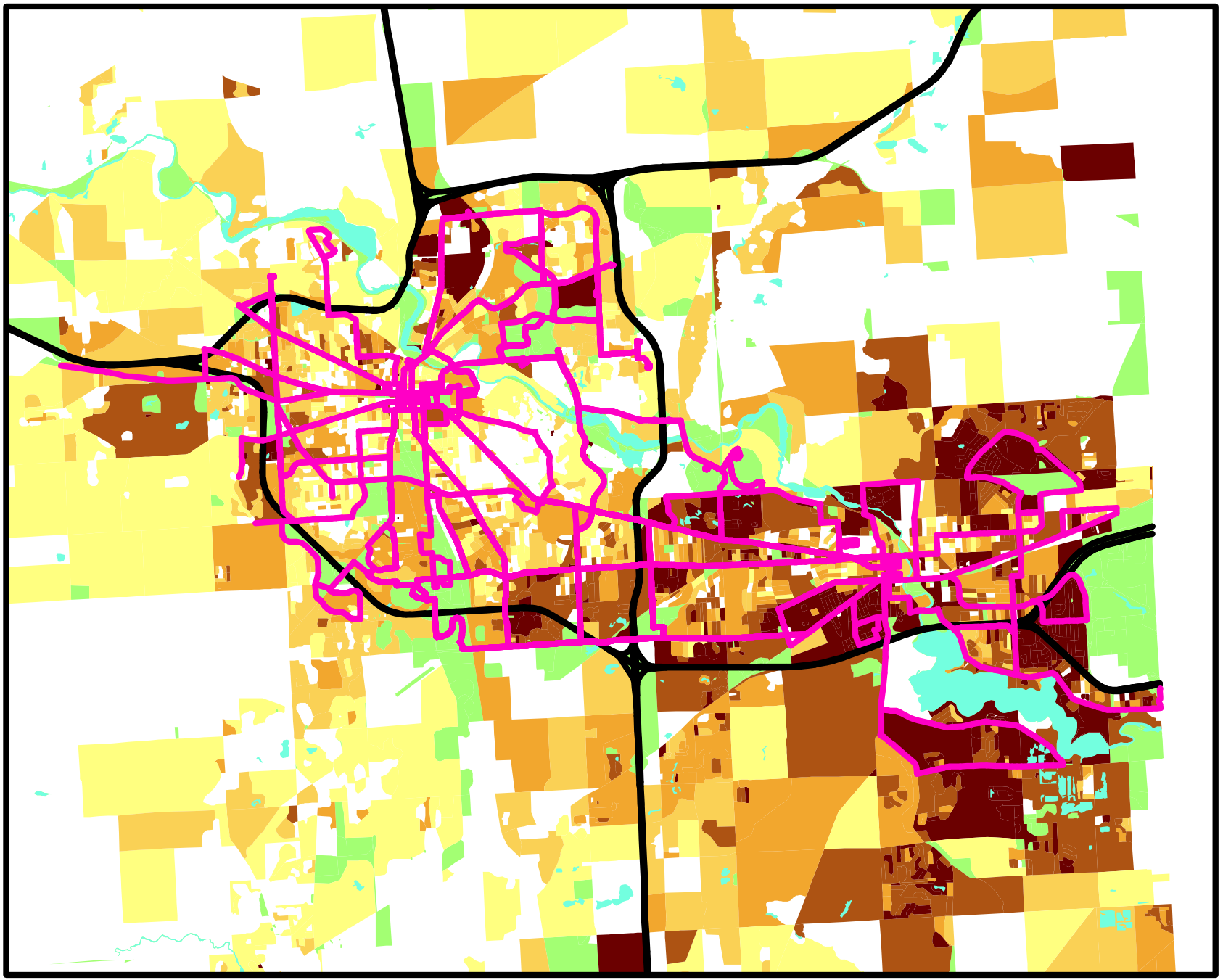
- 1st Quantile >0 - 3.24
- 2nd Quantile >3.24 - 7.2
- 3rd Quantile >7.2 - 14.63
- 4th Quantile >14.63 - 31.13
- 5th Quantile >31.13
- Areas without population

N

0 1 2 Miles

Data Source: Census Blocks 2010 SF1 Created by Jim Mogensen
September 2014

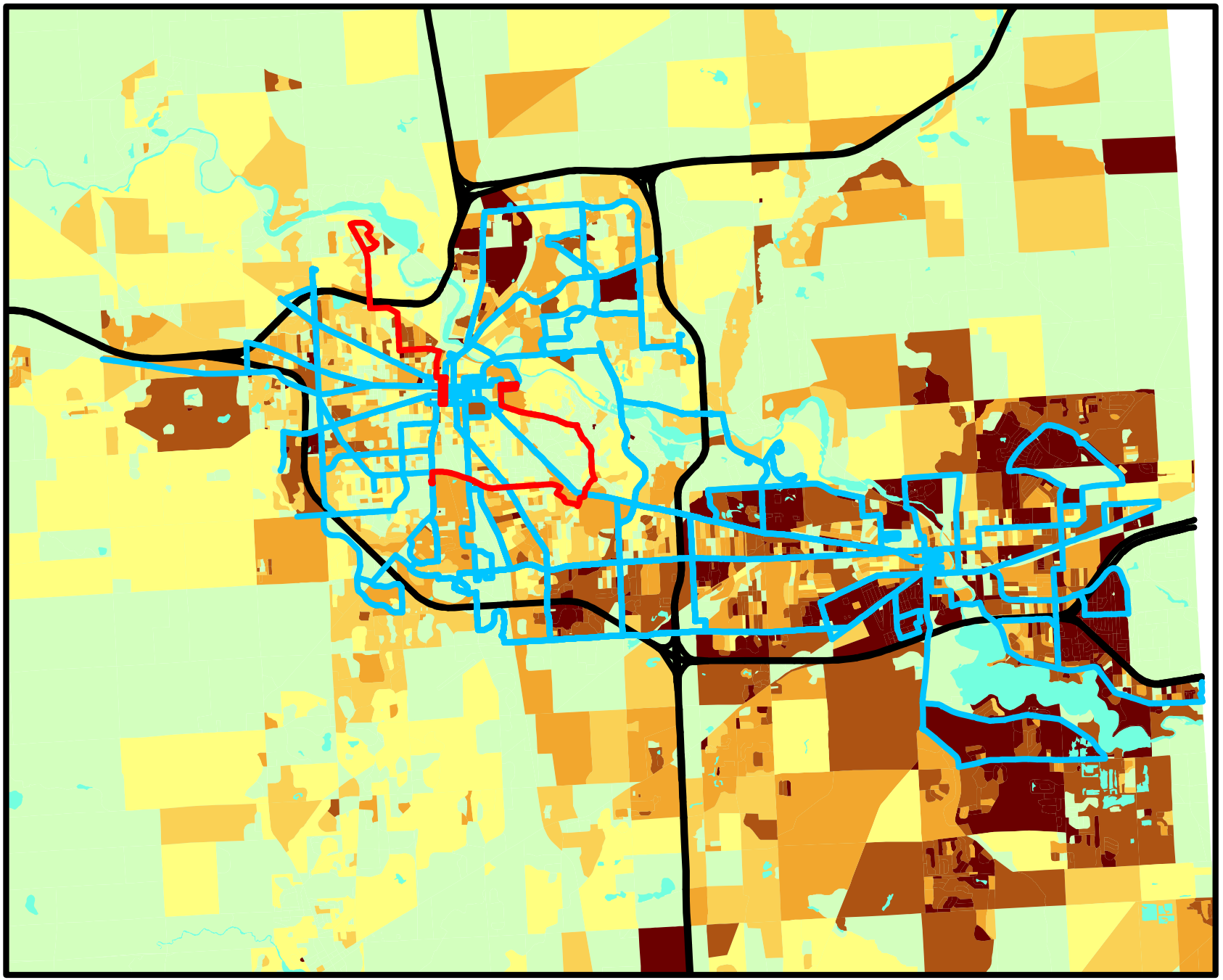
Map 3. AAATA Five Year Transit Improvement Plan Fixed Routes with Census Data - African American



Data Source: Census Blocks 2010 SF1 Created by Jim Mogensen
September 2014

Map 4. AAATA FYTIP Fixed Routes with Census Data - African American and Headway Information

Buses come more than every 30 minutes apart in green (Ann Arbor Routes 13,14)
Buses come every 30 minutes in blue (All other Routes)



Data Source: Census Blocks 2010 SF1 Created by Jim Mogensen
September 2014

To: Board of Directors

From: Michael Ford, Chief Executive Officer

Date: October 10, 2014

Re: Monthly Report

Board Meeting Follow-Up and Preview

Jim Mogensen's comments on Title VI are attached to the September 29, 2014 board meeting minutes (included in the packet), as requested.

The October 16 Board meeting agenda includes two action items moved forward by the Planning and Development Committee: Award of a contract for ARide services and award of a contract for Maintenance and Purchasing Software.

Planning and Development Committee Meeting

The Planning and Development Committee met on October 7. In addition to extensive discussion on the two action items noted above, the committee received several reports detailed in the meeting summary included in the packet. Two presentations of note are included with the PDC meeting summary; the presentation on VanRide and the updated report on Technology for Buses.

Performance Monitoring and External Relations Committee

The Performance Monitoring and External Relations (PMER) Committee is set to meet on Tuesday, October 14. Staff will report on the financial and performance data for the fiscal year ended September 30, 2014, and the Fourth Quarter Work Plan Update. Reports on the action items endorsed by PDC are also included on the agenda. Reports coming out of PMER will be made available following the meeting.

Five-Year Transportation Improvement Program Outreach

I recently met with Christine Green, Scio Township Trustee, to discuss expansion of transportation services into Scio as part of the Five-Year Transportation Improvement Program (5YTIP). The proposed service appears to be in line with township plans to direct growth to the Jackson Road Corridor and the current water and sewer districts. We have asked Ms. Green to gauge interest among other Scio board members and members of the community so that we can coordinate communication efforts.

The first meeting of the Urban Core Working Group, since the successful millage vote, will be held on Thursday, October 23 at 4:00 p.m. in Room 150 of the Morris Lawrence Building on the campus of Washtenaw Community College. We will present the results of our recent service changes, and an update on 5YTIP services yet to come. Dan Cherrin will moderate the meeting as he has done in the past, and we will invite the group to give feedback and describe how they think the Working Group should function in the future.

Meetings and Events

Connector

The Connector Management Committee met this week. Attendees reviewed the draft Alternatives Analysis Summary report and discussed tentative dates for the next public meeting.

Vision for Fourth Avenue

Mary Stasiak and I recently met with AAATA Board member Sue Gott and Susan Pollay, Ann Arbor Downtown Development Authority Executive Director, to discuss a vision for Fourth and Fifth Avenues. I articulated the need to adopt a vision for the area where robust transportation can serve the many and diverse needs of our community to include our accessible fixed-route service, AirRide, Greyhound, and hopefully soon, MegaBus and University of Michigan vehicles. We discussed addressing the aesthetics of the area and creating infrastructure for more sustainability to further develop the enhancement to the downtown area and promote

economic development. The idea is for the improvement activities to coincide with the existing Library Lane pedestrian walkway and the further build-out of the AAATA pedestrian walkway from Fifth Avenue through to Fourth Avenue.

Greyhound

I recently met with Deborah Laney, Area General Manager for Greyhound Lines Inc. We discussed improved operations and handling of their freight as well as passenger pick up and drop off service on Fourth and William and surrounding areas. Additional topics of discussion included the need for signage pertaining to Greyhound business and posted schedule information and assorted materials that we will include at the Blake Transit Center for the general public. Stop bar locations and enhanced communication opportunities were covered, as we continue to coordinate way finding and pedestrian access issues to ensure that the vision and clarity of direction of an intermodal transit center can be realized.

AAPS - Blue Ribbon Advisory Group

The Ann Arbor Public Schools (AAPS) re-convened the Blue Ribbon Advisory Group for this school year. Bill De Groot and I attended the meeting and heard about the Whitmore Lake Annexation vote on November 4 in the Ann Arbor School District and the Whitmore Lake School District. It was explained that the Whitmore Lake School District was created by leaving the Ann Arbor School District in 1958. The current enrollment is 950 students within the Whitmore Lake School System. Whitmore Lake has requested that they be formally annexed back into the Ann Arbor School District. This movement is based on a joint request from each Board to place the annexation request to the voters in each school district. The gains for Ann Arbor would be three additional schools and 950 students. The economic impact to the Ann Arbor District is estimated to net approximately $1.4 Million per year. Transportation needs for the expansion was not a large topic of discussion but it was discussed that if the vote was approved, then a two year transition plan would be established to work through the consolidation.

Street Framework Plan

Chris White, Nancy Shore, and Jeff Murphy are participating in the effort to develop a downtown street framework plan. This effort brings together City and DDA staff to comprehensively plan for streets within the DDA District. In conjunction, input from a variety of downtown stakeholders and the general public is an essential component. The goal is to balance the needs of all street users, with a particular focus on pedestrians and how streets can be used as a public space. The final plan will reflect the understanding that the pedestrian environment is about much more than transportation – that streets serve important social, economic, and environmental needs. Bus stops are an important element, both for bus operations, as well as passenger waiting and boarding areas. A toolkit and implementation guide is expected to be ready by the end of the year.

WATS/AAATA Staff Get Together

We have had a close relationship with the Washtenaw Area Transportation Study (WATS) as we've worked together to improve transportation throughout the county. In order to maintain the relationship as staff evolves at both agencies, we hosted a luncheon and facility tour last week. A good deal of positive interaction took place, and the WATS staff gained a great deal of information about how we provide high quality transit service.

AirRide Meeting

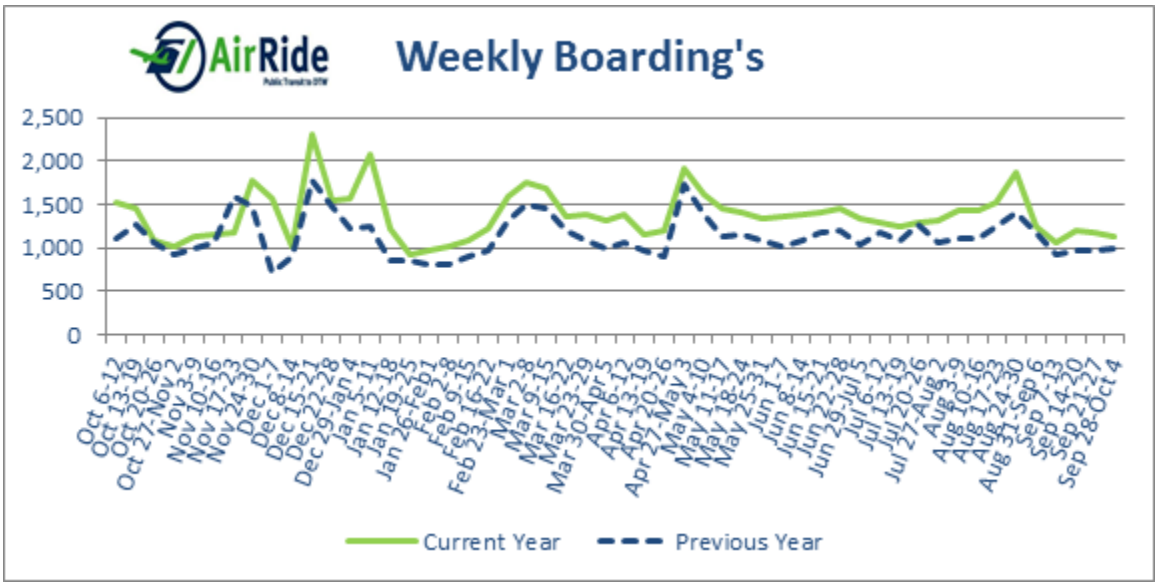
Several members of our staff met with Indian Trails and Michigan Flyer staff to discuss the recent AirRide bus stop relocation at DTW's McNamara terminal. AirRide customers affected by the move from the International Arrivals level to the Ground Transportation Center (GTC) have many concerns.

Nearly 500 emails have been received from concerned customers opposing DTW's decision to move the boarding location to the GTC. Some of the concerns cited were the lack of accessibility for persons with disabilities and the elderly, inconvenience, the longer walk, and an inefficient outdoor waiting area. The customer emails are in addition to several other requests from officials throughout Michigan. We continue to work with the airport in an effort to help ease the impact our riders have felt due to the move. Since the move on September 22, AAATA

and Michigan Flyer have also continued to assist customers by informing them of the new boarding location by way of telephone, email, newsletters, website and social media updates, adjusted wayfinding at DTW, and a customer service agent at DTW.

AirRide Ridership

AirRide service ridership yielded a weekly average of 1,169 passengers over the past three weeks.



Ann Arbor Area Transportation Authority Board of Directors
Planning and Development Committee
Proposed Meeting Summary
October 7, 2014 – 3:00 p.m.

Present: Committee – Eli Cooper (phone), Sue Gott (Chair), Larry Krieg

Staff – Ron Copeland, Michael Benham, Jan Black, Terry Black, Felix Carreon, Brian Clouse, Ron Copeland, Bill De Groot, Michael Ford, Dawn Gabay, Sarah Pressprich Gryniewicz, Ed Robertson, Nancy Shore, Mary Stasiak, Al Thomas, Elizabeth Tibai, Phil Webb, Karen Wheeler, Chris White, Michelle Whitlow

Absent with Notice: Gillian Ream Gainsley, Eric Mahler

Committee Chair Sue Gott called the meeting to order at 3:05 p.m.

1.0 *Communications and Announcements*

There were no announcements or communications.

2.0 *Public Time – Comment on Agenda Items*

There were no public comments.

3.0 *New Business*

3.1 *VanRide: Nancy Shore, Al Thomas & Gail Contrucci*

Nancy Shore reported that VanRide began at AAATA in 2012, to provide a shared-ride van service to commuters whose destinations were within Washtenaw County. Through staff research, it was found that the Authority could offer the vanpool service to users at a lower rate than Michivan/VRide was charging. The Authority has since taken over the program and has been identified, by MDOT, as the designated vanpool provider for Washtenaw County, while VRide continues to be the contract provider for rest of state.

Nancy reported that while the Authority is responsible for the program, it contracts with VRide to maintain the vehicles, handle all billing and insurance fees and maintain the driver contracts. AAATA currently has 71 operating throughout the county, with 69 of those oriented to the UM and two being at the VA Hospital. She noted that there are two more vans at the VA that AAATA

will take over once those vehicles need to be replaced. The internal VanRide team is comprised of several members including: Al Thomas, Gail Contrucci, Nancy Shore, Dawn Gabay and Mary Stasiak. Sue Gott requested that the VanRide team reach out to other companies throughout the county, particularly in and around the Toyota technology park.

Al Thomas serves as the van operations liaison. He works with the AAATA purchasing department to plan for and purchase new vans for those needing replacement and for new starts. He also oversees the operation of the program, including adherence to driver agreements. Gail Contrucci is on the VanRide team in and works in sales and outreach for the program. Ms. Contrucci reported that in FY2015, she would like to start 10 new vanpools, increase VanRide outreach to large employers, and purchase additional vans. Nancy Shore handles the sales, reporting and overall business engagement of the program. Mary Stasiak and Dawn Gabay oversee program operations.

Ms. Shore reported that AAATA receives revenue from the NTD based on the reported miles that vans operate. These dollars are primarily used to purchase other vans. Any left-over funds are allocated to other programs through the Capital and Categorical Grant Program. Vride receives most of the program user fees. Any left-over fees are returned to AAATA.

3.2 *Review of Capital & Categorical Grant Program: Chris White*

Chris White noted that the October Planning and Development Committee meeting marks the beginning of a three month process to review the Capital & Categorical Grant Program (CCGP) for FY 2014-2018. He provided the committee with a report showing what is in existence within the Plan at the moment, and asked the members to identify any proposed changes. All requested changes will be presented to the committee at its November meeting.

The currently adopted FY2014-2018 program was adopted by the Board in December 2013 and revised in July 2014 to include the purchase of expansion buses needed to implement the Five-Year Transit Improvement Program. The successful passage of the millage in May necessitated this revision. Chris reviewed the FY 2015 program with the committee. The FY 2015 program will form the basis for Federal grants for the year and is due to be submitted to the

state in February 2015. Chris noted that most Michigan transit agencies spend their Federal dollars in the year they receive them, whereas AAATA has a practice of planning ahead for future years and to saving the funds accordingly.

Eli Cooper requested to see funds devoted to development of queue bypasses at major intersections in the CCGP. He stated that the development of these bypasses will help expand the overall transportation infrastructure. Sue Gott requested to see capital costs associated with the Origin and Destination Park and Ride study addressed somewhere in the Program. The committee discussed the logistics of an O&D study and whether it could be conducted in-house or if outside contractors were needed.

3.3 *5YTIP Update Process: Michael Benham*

Michael Benham provided the committee with an overview of a proposed policy to address needed changes in the previously adopted Five-Year Transit Improvement Program (5YTIP). He noted it was very important that all changes be made transparent and to include public input. Michael stated that there are several items to think about when considering proposed changes, including:

- The degree of change to the program
- Changes to the external environment
- Whether or not the request is accompanied by funding

Michael discussed currently proposed changes to the 5YTIP and would like the committee to consider:

- How frequently changes should be made to the Program
- What level of change rises to Board Adoption versus a Board update
- Creation of a written policy and/or board resolution

Sue Gott stated she would also like the methodology to be transparent. She asked that the proposed policy be an item for discussion on the November PDC Agenda. She also requested staff to use case studies, with a variety of scenarios, to help the committee understand the range in complexity of making changes to the Program. Larry Krieg requested Authority staff to keep the committee informed of internal AAATA processes and procedures that could be affected by any proposed changes (such as the rebidding needed for proposed Sunday service on Routes 10, 11 and 20).

3.4 *ITS (CAD/AVL) Project: Jan Black*

Jan Black reported that for the past several months, Authority staff have been working with Transystems (a consultant), to create functional specifications for an RFP to procure a new Intelligent Transport System or "ITS" (also known as a CAD/AVL system, or an AOS system). Two projects are dependent on this procurement:

1. The new Paratransit service model
2. Bus procurement

The system will be used to track Paratransit vehicles and may be replacing the tracking system currently used on the fixed route fleet. The current CAD/AVL system has been in place since 1997 and has become outdated. The RFP is scheduled to be issued next week and the entire RFP process should be complete by the February Board meeting. Sue Gott requested a high level summary of the technical qualifications and selection criteria used in the RFP process at the November PDC meeting.

4.0 *Action Items*

4.1 *ARide Contract: M. Whitlow, Brian Clouse & Bill De Groot*

Brian Clouse reported that the current ARide contract will expire April 30, 2015. The Authority has been working with RLS (a consulting company), since 2012 to develop specifications and a new service delivery model for ARide operations. The completed RFP was issued in June 2014 and the Authority had 17 agencies express an interest in the project. AAATA received only two proposals on August 4, 2014. One proposal from Select Ride (the current A Ride provider), and the other from Blue Cab (the current NightRide provider). Both companies were invited to participate in the interview process. After interviews and scoring, staff recommends that the Board give its approval for finalize an ARide contract with Select Ride.

Bill De Groot noted that the Local Advisory Council (LAC) and Jack Bernard participated in the ARide RFP process. Mr. Bernard did not participate in the evaluation process, but two LAC members were on the evaluation team. With the new ARide model the customer would not notice any changes. Customers will call the same number to make reservations, but will interface with AAATA instead of Select Ride. The new model will feature an in-house call-center and

the hardware, software, and data will be kept internally. There will be no change in the amount of vehicles in the fleet, but under a new agreement, AAATA will own the majority of the vehicles instead of Select Ride. Brian Clouse reviewed some benefits to the new ARide model, such as additional it will become clearer to the community that ARide is a service of the Authority. The vehicles owned by the Authority will feature the company logo and branding. ARide vehicles that are not owned by the Authority will feature co-branding with Select Ride.

Michelle Whitlow reported that the current contract with Select Ride expires May 1. The RFP for a new contract was issued June 9 and advertised in national transit media, as well as local and regional media. Michelle noted that there were 10 individuals who participated in the non-mandatory pre-proposal meeting on June 23, 2014. AAATA received two proposals on August 4, 2014 (Select Ride and Blue Cab). During follow-up with the other potential bidders, it was found that many of the interested vendors were looking for a longer term contract of six, seven, or more years, as opposed to the maximum five year contract specified in the RFP.

Eli Cooper mentioned concerns he has heard from the public during Board Meetings regarding the age of the vehicles used for ARide operations. Mr. Clouse noted that several staff members, including Michael Ford, have ridden in the contractor's vehicles. Some of the vehicles are older, but comfort was not an issue and their age did not affect the performance of the vehicle. Terry Black reported that random quarterly inspections are performed on the vehicles and he is very satisfied with Select Ride's vehicle maintenance. Terry also receives a monthly report from Select Ride on vehicle performance, including any driver write-ups. Mr. Cooper believes there is a public perception issue regarding the age of the vehicles.

Sue Gott requested an addition to the 'Whereas' sections of the resolution that would state that, '*It is the due diligence of staff to inspect and monitor the fleet'*. She also requested an addition to a 'Therefore' clause stating that there is, '*continued commitment to maintain* the robust monitoring of the fleet.'

Board Member Larry Krieg recommended support of the motion as written, with the above additions to the resolution.

Eli Cooper seconded the motion. All committee members were in favor of the motion and it will be forwarded to the Full Board for further consideration.

4.2 *Maintenance & Purchasing Software: M. Whitlow, T. Black, P. Webb & J. Black*

Michelle Whitlow reported that the Authority purchased Ultramain, the current Maintenance and Purchasing software, in 2006. Ultramain is most often used in the aviation industry. It is a software built upon what has now become "old" technology. The current vendor continues to have difficulty providing solutions to AAATA requests for updates or changes to better accommodate operations. Staff at the Authority have been seeking a new maintenance and purchasing software for the past several years.

AAATA paid $787,429 for the current software and $343,690 for a five-year maintenance agreement. The original maintenance agreement expired in 2011 and AAATA has paid an annual maintenance fee each year since then. The most recent fee was $74,439 for one year. Michelle Whitlow reported that AAATA issued an RFP on February 20, 2014, for new maintenance and purchasing software. The RFP was posted on the Michigan Inter-governmental Trade Network (MITN) and also advertised in local and regional publications. A non-mandatory pre-proposal conference call was held on March 11, 2014 with five firms participating. On April 4, 2014 the Authority received two proposals from FleetAware and Trapeze Software Group. After the proposals were evaluated, staff recommends that the Board approve an award for a contract to Trapeze Software Group for its Enterprise Asset Management (EAM) software for a price of $784,945.

Almost 90 transit agencies currently use the Trapeze Software Group, Enterprise Asset Management (EAM) software. Terry Black stated that the EAM software will integrate with our other systems to provide seamless operation. Phil Webb reported that the Authority paid for one more year of Ultramain maintenance so that the data being held in the system can be exported into an excel format. It was found to be too costly for the vendor to transfer all the data over to its new software programs, so staff will use the extra year to export the necessary data into the new software, and the remainder into commonly used data bases.. Phil estimates a year transition for the new software to be fully deployed and operational. Sue Gott would like this extra timeline to be stated at the October Board meeting.

Board Member Eli Cooper recommended support of the motion as written.

Larry Krieg seconded the motion. All committee members were in favor of the motion and it will be forwarded to the Full Board for further consideration.

5.0 Continuing Business

5.1 *Technology for Buses: Sarah Pressprich Gryniewicz & Felix Carreon*

Felix Carreon provided the committee with a summary of the revised *Hybrid and Low Emission Bus Technologies report.* The report was drafted from an issue analysis in August 2014, and incorporates committee member requests for additional information and preliminary research on other bus technologies. All revisions or new content in the report are highlighted in yellow and will be provided to all Board members.

Mr. Carreon highlighted new research on alternative bus technologies such as Hydrogen and CNG. Hydrogen technology is very expensive and may not be feasible for the Authority. It was found that AAATA would end up paying more in fuel costs for Hydrogen buses than most of the other technologies. Mr. Carreon reported that the CNG buses may be a great fit for the Authority in the future. The technology is a cleaner fuel source than conventional diesel and grant opportunities to adopt such a system may be available. Further research is forthcoming.

Ms. Gryniewicz stated that some analysis was done on dedicated routing and its effects on the type of bus technology in the Authority's fleet. She stated that the initial analysis was inconclusive and indicated that routing and technology usage did not have a large effect on fuel savings for the system. AAATA buses are not assigned to specific routes, and change daily. Eli Cooper asked if there was opportunity to take the fuel savings from the current hybrids and reapply those savings to other fuel saving technologies. If such an accounting system were to be instituted, these savings could also be used for additional maintenance cost of the hybrids, if those extra costs are not already programmed into the budget. Mr. Cooper requested the report and board resolution to have a proactive stance to seek funds for hybrid or other environmentally friendly technology.

The resolution will be updated to reflect the discussion of committee members.

6.0 *Updates*

6.1 *BTC Artwork: Dawn Gabay*

We recently received word from Robert Delgado, the artist contracted to create the artwork for the BTC, that there is a delay in the project. Originally, Mr. Delgado expected to have artwork installed by the end of October, 2014. The most recent communication indicated that the tiles will be completed mid to late November which would require that the installation takes place in the spring of

2015. This is so an appropriate temperature can be realized for the mastic to properly adhere the tiles to the limestone exterior of the building.

Mr. Delgado's $50,000 contract includes milestone payments. So far, he has received $20,000 ($5,000 upon signing and $25,000 upon completion and approval of design). He has not received the $10,000 payment for midpoint completion of the work. In addition, there is a $20,000 payment due upon delivery and completion of installation of the work.

6.2 *YTC Update: Terry Black*

DLZ is in the process of doing an evaluation of the YTC building to see what the structural possibilities are for remodeling the existing building. With the projected growth over the next (5) years and the expansion of services, there is concern that the present facility will not remain adequate. DLZ with be forwarding suggestions on what may be done with the facility to increase customer lobby space, operators break room, and operator restrooms within the next couple of weeks which should help guide the Authority.

6.3 *R&D Projects: Michael Benham, Chris White*

The Connector steering committee is scheduled to meet on Thursday, October 9 and is expected to set a date for a public meeting in November to recommend the Connector's physical alignment.

N-S Rail (WALLY) – The contract to undertake the federally-funded feasibility study has been signed by both AAATA and SmithGroup/JJR. Work may now begin, and an internal project initiation meeting is scheduled for Oct 22. This work will be accompanied by a vigorous public involvement program over an 18-month period.

South State Street – A South State Walkability Tour will take place on Oct 14, involving the study Steering Committee and consultant personnel.

6.4 *Urban Core Working Group: Michael Benham*

The first meeting of the Urban Core Working Group, since the successful millage vote, will be held at WCC on October 23. We will present the results of our recent service changes, and an update on 5YTIP services yet to come. Dan Cherrin will moderate the meeting as he has done in the past, and we will invite

the group to give feedback and describe how they think the Working Group should function in the future.

6.5 *RTA Developments: B. De Groot & S. Gryniewicz*

The RTA has its first dedicated employee, Tiffany Gunter, COO, as of Monday, October 6. Staff is working with other RTA providers on a study for Seamless Fare Integration. A first-ever Regional Transit Map has been developed and will be printed and posted soon. Several RTA committees will meet this week and staff will provide further updates as appropriate.

7.0 *Public Time*

There were no public comments.

8.0 *Future Meetings*

Tuesday, November 11, 2013 at 3:00 p.m.

9.0 *Adjourn*

There being no further business, Ms. Gott adjourned the meeting at 5:14 p.m.

Respectfully Submitted,

Elizabeth Tibai

VanRide Update

October 8, 2014

Today's Agenda

- VanRide 101: What, Why, How.
- VanRide Purpose, Approach, Ideal Client
- Meet the Team

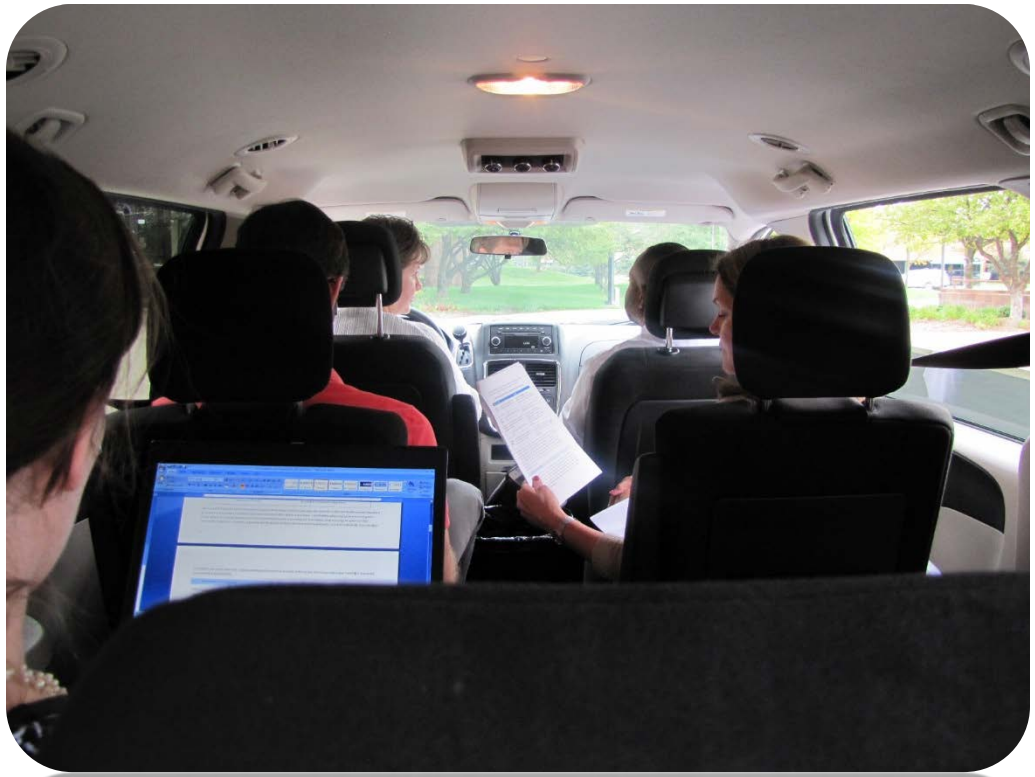
- Van Operations (Al)
  - Where are we at right now?
  - Where are we going?
- Van Outreach/Sales (Gail)
  - Where are we at right now?
  - Where are we going?
- Bringing It All Together (Nancy)
  - Vanpool Dashboard
  - High Level Financials
  - Plan for FY2015
- Questions and answers

VanRide 101: Why, What, How

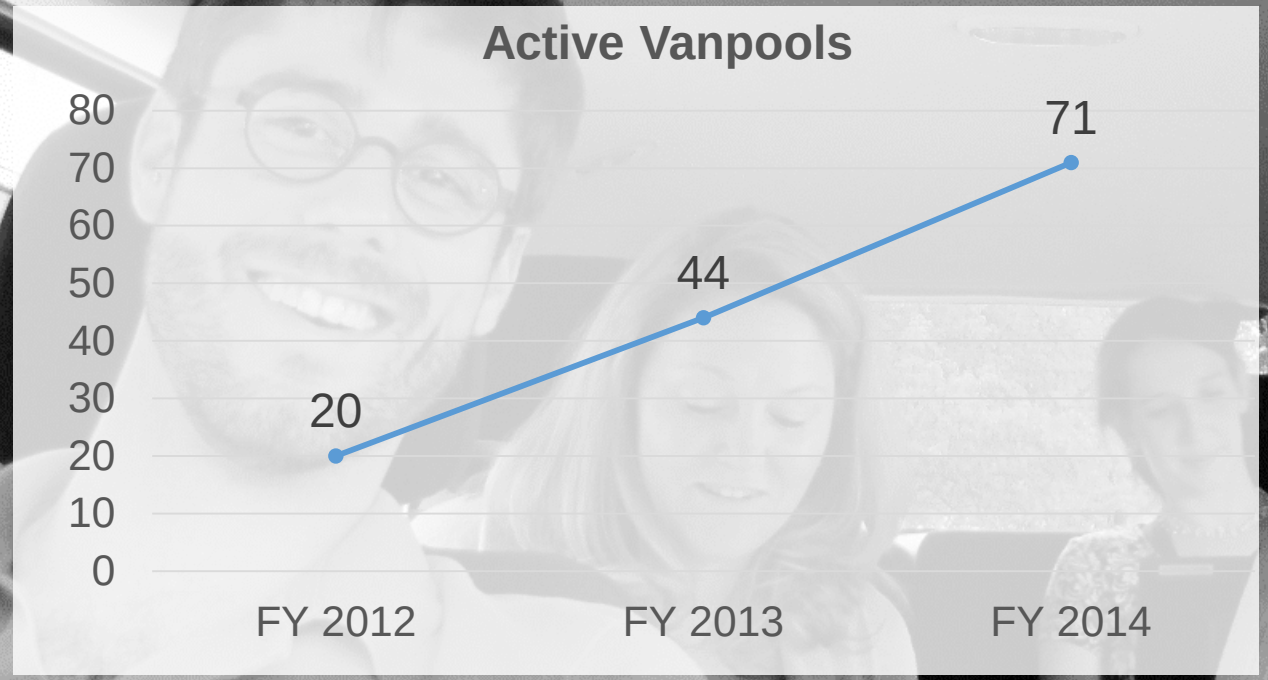
- **Started in 2012**
- *Why?*
  - Reduce cost to current riders
  - Compliments our suite of services
  - Revenue generation
- *What?*
  - Provide a shared-ride van to commuters coming into and within Washtenaw County.
  - Minimum of 4 riders and a driver
  - Driver rides free, others pay monthly fee
- *How?*
  - We provide sales, marketing and outreach for the program
  - We supply van
  - VRide does much of “back end” (e.g. insurance, rider agreements, billing)

Our Approach & Ideal Client

- Our Approach
  - Employer-based rather than individual-based
- Our Ideal Client
  - Employees with consistent shifts
  - Large employers (100+)
  - Employees coming from far away (30 + miles one way)



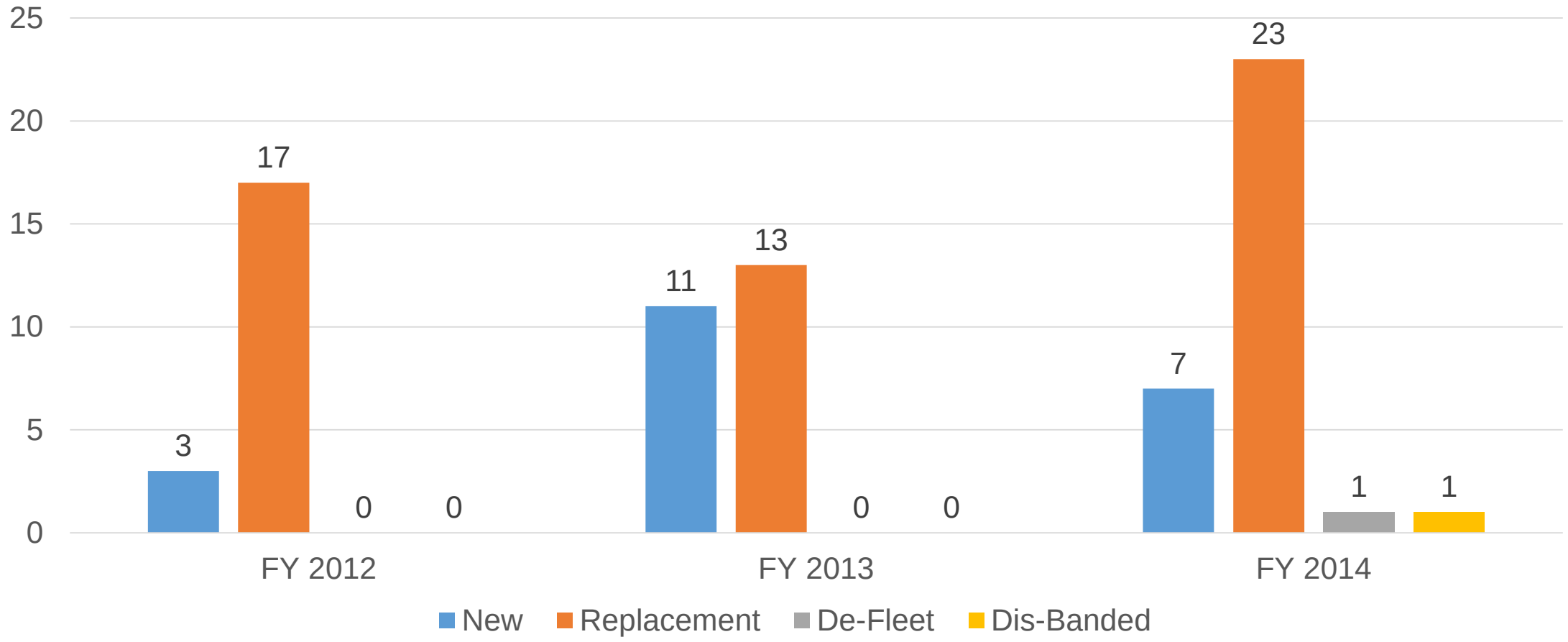
Our Clients



VanRide Vanpools by Organization (Sept 2014)

UM	69
VA	2
TOTAL	71

VanRide Vanpool Status



VanRide Benefits (from VRide*)

Benefit	Number
Active Vanpools	71
Parking Spaces Saved per Day	291
Trips Eliminated Per Day	582
Trips Eliminated (Cumulative)	12,226
Vehicle Miles Eliminated (Cumulative)	581,327
Fuel Saved (Gallons)	23,069
Fuel Savings (Dollars)	$78,571
Carbon Monoxide Reduction (Tons)	8.69 tons
Carbon Dioxide Reduction (Tons)	226 tons

*Assumptions based on Vanpool Reports, NTD reporting, USDOT and EPA and DOE data.

The VanRide Team

- Special Services Coordinator / **Al Thomas**
  - Van operations
- Business Outreach Coordinator / **Gail Contrucci**
  - Sales and outreach
- Business Engagement and GetDowntown / **Nancy Shore**
  - Downtown sales and outreach
  - Isharearide administration
  - Reporting
  - Business engagement strategy

Oversight Team

- **Dawn Gabay & Mary Stasiak**
  - Support and Team Management
  - Strategic Planning
  - Advice and Strategic Direction
  - Make, authorize, or recommend to the CEO and/or Board major decisions needed for the VanRide program as appropriate.

VRide and Other Support

- **VRide**
  - Billing
  - Insurance
  - Maintenance
  - Driver agreements
- **Other internal support**
  - Purchasing, Grants, Finance, Billing

Van Operations: AI

- **Where are we at right now?**
  - Successes?
  - Challenges?
- **Where are we going?**
  - Next steps with van operations.

Van Outreach/Sales: Gail

- **Where are we at right now?**
  - Successes?
  - Challenges?
- **Where are we going?**
  - Next steps with Van outreach/sales.

High Level Finances

	Monthly $ per van	Annual per van	$ over life of van (5 years)
Operating Revenues/Expenses that AAATA realizes			
Revenue from Vehicle Miles*	+ $1,000	$12,000	+$60,000
VRIDE payment to AAATA	$60	$720	$3,600
Cost of Vehicle	$375	$4,500	$22,500
Surplus---federal funds allocated to other projects	***$565/month/van***	***$6,780/year/van***	***$41,100/life of van/van***

VanRide-Related Expenses Paid with CMAQ Grant

- Staff time
- Promotion and Outreach
- Guaranteed Ride Home

*Revenue being applied to Capital and Categorical Grant Program Expenses

Bringing It All Together

- **The Bottom Line**
  - Program is successful with plans in place to grow in 2015
  - A true interdepartmental effort
- **Where are we going?**
  - Plan for FY2015
  - Increased VanRide outreach to larger employers as part of overall business engagement strategy
  - Purchasing Additional Vans
  - Weekly meetings with operations and sales
  - Continuing strategy sessions

Hybrid and Low Emission Bus Technologies, October 2014

The following document is a compilation of research done by TheRide staff on hybrid and low emission bus technologies and staff's recommendations. The following includes reformatted information contained in earlier documents: issue analysis (August 2015), supplemental information requested from board members (September 2014) and additional information requested at the September PDC.

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Issue Analysis:
Hybrid and Low Emission Conventional Bus Technologies

Summary of the Issue:

At the August 2014 meeting, TheRide approved a 5-Year bus procurement which will give TheRide the ability to obtain buses over several orders. A first order of 27 buses was also approved for delivery starting in November 2015, but a decision still needs to be made by November 2014 about what type of technology to include on the buses

Board members have asked staff to research key questions: What buses should TheRide purchase for this order; taking into account cost, availability and use of funds, environmental effects, and operational requirements? How could we pay for the incremental cost of hybrid buses?

Staff Recommendation:

Based on the research described below, staff recommends purchasing all low emission conventional buses for the first bus order (delivery starting in November 2015) as the most appropriate option that balances benefits and costs.

Buying Hybrid buses, with dedicated grants, has been a good strategy in the past, helping TheRide be more environmentally responsible. However, low emission conventional buses are TheRide's best option for this bus order. Continuing to buy hybrids jeopardizes TheRide's ability to deliver service, because of longer-term and higher-cost maintenance issues associated with hybrid buses. In addition, modern Low Emission Conventional buses are among the lowest emission vehicles and can be purchased at a reasonable cost. Lastly, TheRide does not have dedicated grants available for the incremental cost of hybrid buses. Research and TheRide's experience demonstrates that though Hybrids have lower emissions and slightly lower noise output than low emission Conventional buses, TheRide will not see sufficient return on investment to justify spending funds that could be used for service or other essential projects.

Per PDC direction, staff are developing a timeline and recommendation for the next bus order (or as necessary, a new purchase) with particular focus on CNG, electric, other technologies, and/or higher capacity buses.

Additional recommendations and next steps are included starting on page 20.

History and Background

TheRide, in fulfillment of its mission, is environmentally-responsible and saves local communities emissions and fuel. TheRide's wide range of transit options provide a shared resource and alternative to single-occupancy driving (and parking!). Each rider that decides not to use a car on a particular day, or even to buy a car, is of benefit to the community and other transportation network users.

Operationally, TheRide has been an environmental leader for many years. TheRide ensures that buses, no matter which type, are low emission, to fulfill the Mission and to meet EPA standards. All TheRide's buses are fueled with ultra-low sulfur diesel and biodiesel. Each bus is equipped with particulate traps and most have electric cooling system fans to reduce the amount of power taken from the engine and improves fuel mileage.

As a practice, TheRide has invested in hybrid technology exclusively through dedicated, competitive grants. TheRide's fleet appears to have the highest percentage of hybrid vehicles in the US. Out of 80 buses in the active fleet, 52 are Hybrids and 28 are Conventional diesel buses. The oldest hybrid buses are about 7 years old (2007) and are not scheduled to be replaced until 2019. In the bus order for 2015, 14 buses will replace existing conventional buses and 4 buses would be used for the new 5YTIP service.

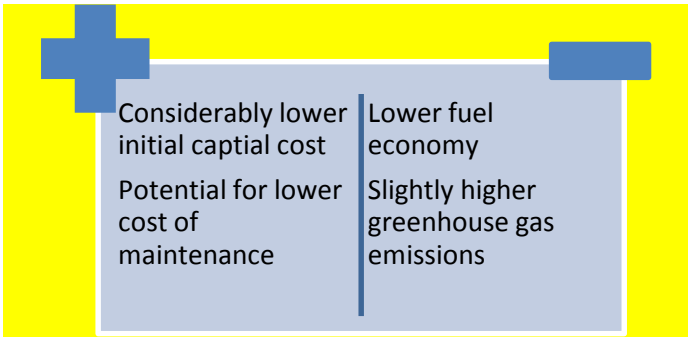
In the past, Hybrid technology has been demonstrated more fuel-efficiency and lower emissions, and has cost about $200,000 more than a conventional diesel bus. Because of availability of grants, TheRide was able to offset the addition cost of Hybrids without using local funds or negatively impacting service. However tightened EPA standards and improvements in technology have made low emission conventional buses significantly more fuel-efficient, but still costing about $200,000 less than a hybrid bus.

Because of this narrowed gap between Hybrids and Conventionals' efficiency, it is much more difficult to obtain a competitive grant to cover cost differences. To purchase Hybrids, TheRide would have to cover the additional cost using funds that could be used for service or other projects; necessitating prioritization.

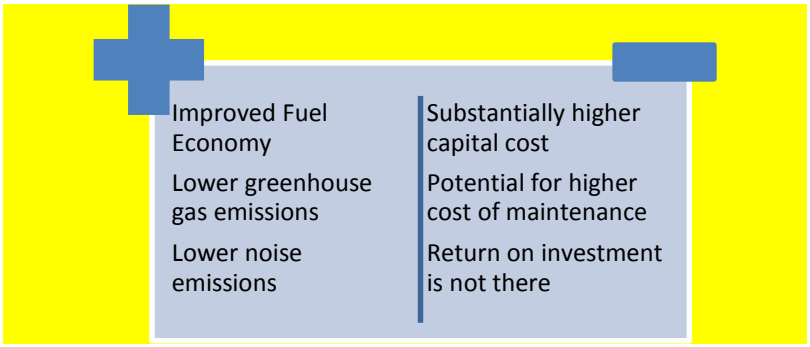
Staff conducted research between the two bus technologies. Data was taken from TheRide's bus fleet and operations. Staff made contact and obtained information from several transit agencies.

1. Overview: Technology Pros & Cons

Low Emission Conventional Bus



Hybrid Bus



2. Life Cycle Costs

a. Overview of Life Cycle Costs

West Virginia University conducted a life cycle cost (LCC) analysis on bus technologies with a fleet of 100 vehicles, operating at national average speeds and mileage, which compare well with TheRide's average[1].

The LCC includes the capital cost of the vehicle and the operation costs, including facility maintenance, propulsion-related system maintenance, battery replacement, fuel costs, and emissions equipment. Using 2008 $, the life cycle cost per bus per mile for a hybrid bus was $2.35 vs a standard conventional bus at $1.83.

Extrapolating this to TheRide's data, the total life cycle costs for an average hybrid bus in 2008 $ was estimated to be $969,826 while the average conventional bus was $755,226; resulting in the hybrid bus costing approximately $214,600 more than the conventional bus over the life span of the vehicle. See the table below for a summary.

[1] Additional Transit Bus Life Cycle Cost Scenarios Based on Current and Future Fuel Prices. (September 2008). http://www.fta.dot.gov/documents/WVU_FTA_LCC_Second_Report_11-03-2008.pdf. Accessed in July 2014

Note that TheRide has used competitive grants to cover the incrementally higher upfront costs of ~$200,000, making previous purchases of Hybrids close to cost-neutral with Conventional buses. In addition, Since 2008, fuel costs have risen, but conventional buses have also become significantly more fuel and emission-efficient. More detailed data is included in subsequent sections.

Extrapolating the Overall estimated life cycle cost per bus per mile, 2008[2]

Life Cycle Cost per Bus per Mile breakdown			
	conventional diesel	Diesel Hybrid	Difference
TheRide Average Miles/year	34,391	34,391	
LCC Estimate cost/mile	$ 1.832	$ 2.349	$ + 0.517
facility maintenance	$ 0.049	$ 0.042	$ -0.007
propulsion-related system maintenance	$ 0.158	$ 0.152	$ -0.006
battery replacement	$ 0.000	$ 0.161	$ +0.161
fuel costs	$ 0.857	$ 0.723	$ -0.134
emissions equipment	$ 0.003	$ 0.000	$ -0.003
depot modification	$ 0.000	$ 0.000	$ 0.000
vehicle cost	$ 0.763	$ 1.269	$ +0.51
Extrapolated cost/year	$ 62,936	$ 80,819	**$ 17,883**
Extrapolated cost/life span	**$ 755,226**	**$ 969,826**	**$ 214,600**

TheRide's estimated life cycle costs per bus

	Upfront Cost	Fuel Costs over Life	Known Major Costs for Tech Type	Total Life Cycle Costs
2013 Low Emission Conv.	$ 455,298	$ 301,261	$ 5,000 transmission	**$ 761,559**
2013 Hybird	$ 650,763	$ 244,501	$ 18,000 Extended Warranty $ 35,000 battery replacement $ Unknown Costs	**$ 948,264**

b. Upfront Costs (vendor data)

The cost of a new 2016 low emission conventional diesel bus is estimated at $455,298. The cost of a new 2016 hybrid bus is estimated at $650,763; an incrementally higher cost of approximately **$195,465,**

[2] Adopted from Additional Transit Bus Life Cycle Cost Scenarios Based on Current and Future Fuel Prices (September 2008)

not including extended warranties. (Note: the final, hybrid/conventional costs may change somewhat, but will be determined in the bus order)

c. Fuel Costs (2013 data)

Using data on the 2013 hybrid and conventional buses in TheRide's fleet, the average hybrid bus gets 5.3 MPG while the conventional buses get 4.3 MPG. Using a fleet average of 34,391 miles per year per bus and today's fuel prices, the hybrid yields fuel savings of approximately **$4,738** per year per bus. Over the life of the bus, this results in total savings of $56,860 over 12 years.

Fuel Costs over Lifespan[3]

	Avg MPG	Miles/Year	Gallons/Year	Fuel Cost/Year
2013 Hybrid	5.3	34,391	6,489	$ 20,375.05
2013 Low Emission Conventional	4.3	34,391	7,998	$ 25,113.43
			Cost Differential	$ 4,738.38
			Life of Vehicle	x 12 years
			Total Life Fuel Savings of Hybrids	**$ 56,861**

Taking the incremental cost of hybrid ($195,465) and subtracting the total fuel savings of hybrid bus ($56,861) results in an approximate **$138,604 additional cost of a hybrid bus over a low emission conventional bus at today's fuel prices**.

TheRide plans to purchase 27 buses for delivery starting in November 2015. If TheRide decided to purchase all hybrids then this would amount to $5,277,550 additional capital cost over conventional buses. The expected total fuel savings from these hybrids would be approximately $1,535,247 over the life span of these buses. Therefore, without incorporating maintenance costs, the hybrid buses will cost an additional $3,742,308 over their lifespan compared to a fleet of conventional buses.

Capital and Fuel Costs	**1 Hybrid**	**27 Hybrids**
Hybrid Upfront Cost	$ 195,465	$ 5,277,550
Fuel Savings for Life Span	-$ 56,861	-$ 1,535,247
Additional Cost of Hybrid for Life Span	**$ 138,604**	**$ 3,742,303**

[3] TheRide's data: fleet MPG average 7/1/13 – 7/1/14.

These numbers assume that the price of diesel fuel will remain constant in future years. Since diesel prices tend to fluctuate, the following tables illustrate the fuel savings of hybrids if prices were to increase 5% and 10%.

Fuel Costs	**Increase in Diesel fuel price by 5%**	**By 10%**	**By 244%**
2013 Hybrid	$ 21,413	$ 22,386	$ 70,079.77
2013 Low Emission Conv.	$ 26,393	$ 27,593	$ 86,377.40
Cost Differential	$ 4,980	$ 5,206	$ 16,297.62
	$ 59,758	**$ 62,474**	**$ 195,571.46**

Diesel costs would have to rise by 244% for Hybrids to break even with upfront costs of low emission conventional buses.

d. Ann Arbor Green Fleets Policy

Ann Arbor become the first city in Michigan to adopt a comprehensive "green fleets" purchasing policy when it adopted a resolution on August 21, 2000. The policy aims to reduce both fuel consumption and fuel emissions through more intelligent use and purchase of vehicles and fuel-using equipment. The policy suggests that the City of Ann Arbor purchase the most-effective and least polluting vehicles and fuel using equipment possible that still meet the operational requirements of the intended use.

One of the main components of the green fleets policy is in regards to funding of "green" vehicles. "A 'Green Incentive' shall be put in place that allows the purchase of 'green' vehicles, equipment or products if the price is within 20 percent including rebate, of the lowest bid for that vehicle, equipment or product class and is recommended by the Green Fleets Team. The 20 percent funding shall serve as a guideline, but not as a limit, to determine the 'greener' vehicle recommendation...if a vehicle shows very little improvement in fuel economy or emissions but costs 15 percent more, it may not be recommended[4].

A 2013 hybrid in TheRide's fleet gets an average fuel economy of 5.3 MPG while a 2013 conventional bus gets 4.3 MPG, an increase of approximately 23%. However, the additional capital and warranty cost of the hybrid compared to the conventional diesel option is approximately 47%. While hybrids are more fuel efficient and lower emission, the substantial additional costs do not make them a cost-effective option. Under the green fleets policy, it is unlikely that hybrids in TheRide's situation would be recommended without the help of dedicated grants to cover the incremental cost.

[4] Ann Arbor Green Fleets policy pgs 3-4.

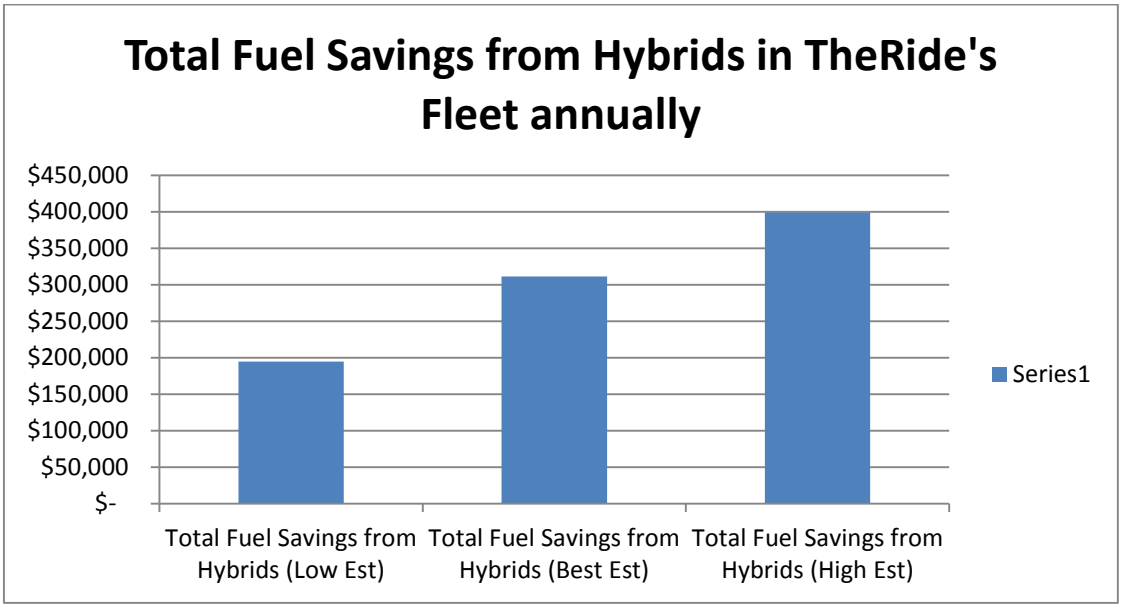
e. Fuel Savings from TheRide's Hybrids

Using TheRide's fleet data from July 2013 to July 2014, total fuel costs for hybrid buses in the active fleet was approximately $1,257,956. In order to compute fuel savings of hybrids compared to conventional diesel buses, an average of 4.0 MPG was used (the average of 2013 and 2003 conventional buses). This resulted in an estimated fuel savings of $311,237 over the last year, resulting in a savings of $5,985 per hybrid bus.

Calculations were also made to establish a low estimate and high estimate for hybrid fuel savings for TheRide's bus fleet. A low estimate of hybrid fuel savings was calculated using an average of 4.3 MPG which is the average fuel economy for 2013 Low Emission Conventional buses. A high estimate for hybrid fuel savings was determined using an average of 3.8 MPG, the average fuel economy of 2003 conventional diesel buses. The following tables and graphs illustrate this data.

Annual Fuel Savings from Hybrids in TheRide's fleet, July 2013-July 2014

	Low Estimate (vs 2013 Conv.)	**Best Estimate (vs 2003 and 2013 Conv.)**	High Estimate (vs 2003 Conv.)
Total	$ 194,619	$ 311,237	$ 399,211
Per Hybrid bus	$ 3,743	$ 5,985	$ 7,677



The total best estimate of fuel savings over the life of the hybrid fleet is as follows:

Estimated Hybrid Fuel Savings since 2007

Year	Fuel Savings by year
2007	$ 95,765
2008	$ 119,706
2009	$ 161,605
2010	$ 185,545
2011	$ 245,398
2012	$ 245,398
2013	$ 311,237
Total	**$1,364,654**

Cost savings from relatively more fuel efficient buses is an estimate, as TheRide does not have directly comparable buses from each year and it is not tracked. Fuel is paid for as operating expenses and any lower costs were realized in each annual budget. The savings due to the lower cost of fuel has not been reserved. The lower cost of fuel, in effect has freed up some operating funds for service, including enhancements such as the Route 4 improvements of 2012.

A major difference between this order and previous orders is that TheRide was able to use dedicated Clean Fuels grants to generate these environmental and operational savings—federal capital freed up and allowed local operating funds to go farther, and erased the cost increment of hybrid buses. The situation in 2014 is different in that TheRide would need to use its own non-dedicated funds to pay for the Hybrid differential and these costs will not substantially be recouped over the life of the buses.

If the savings had been reserved, they would cover incremental costs ($195,000 + warranty) of roughly 6-7 hybrid buses. Or based on the 2013 fuel savings, about 1.5 hybrid buses on average per year. However, there are two important caveats:

- Because the savings were already realized in previous operating budgets, the money would still need to be found in the FY2015 budget, by delaying other bus purchases, delaying programmed capital projects, or using Capital and Categorical funds from later years. These options are more fully laid out in Next Steps, Section 2, below
- Staff has concerns about the ongoing maintenance costs of hybrid buses. If "banking" any estimated fuel savings is considered, covering hybrid maintenance costs should be a primary focus. As mentioned in the Issues Analysis, there have been a few unexpected hybrid drive unit failures at a cost of $60,000 - $75,000 which were not covered under warranty. Staff continues to monitor the fleet, but remain concerned about escalating costs.

f. Maintenance Costs and Concerns

Staff have significant concerns about ongoing maintenance cost of hybrid buses. The oldest hybrids (2007) are nearing 300,000 miles, just past their mid-life and are starting to require some significant repair costs related to the hybrid components. These costs over the second half of the hybrid's life are still unknown. For instance, there have recently been a few drive-unit failures which were not covered under warranty. Major failures, of an electric-drive unit for instance can cost $60,000-75,000, whereas a replacement for a conventional diesel bus is ~$5,000. The 5-Year warranty period has expired on the

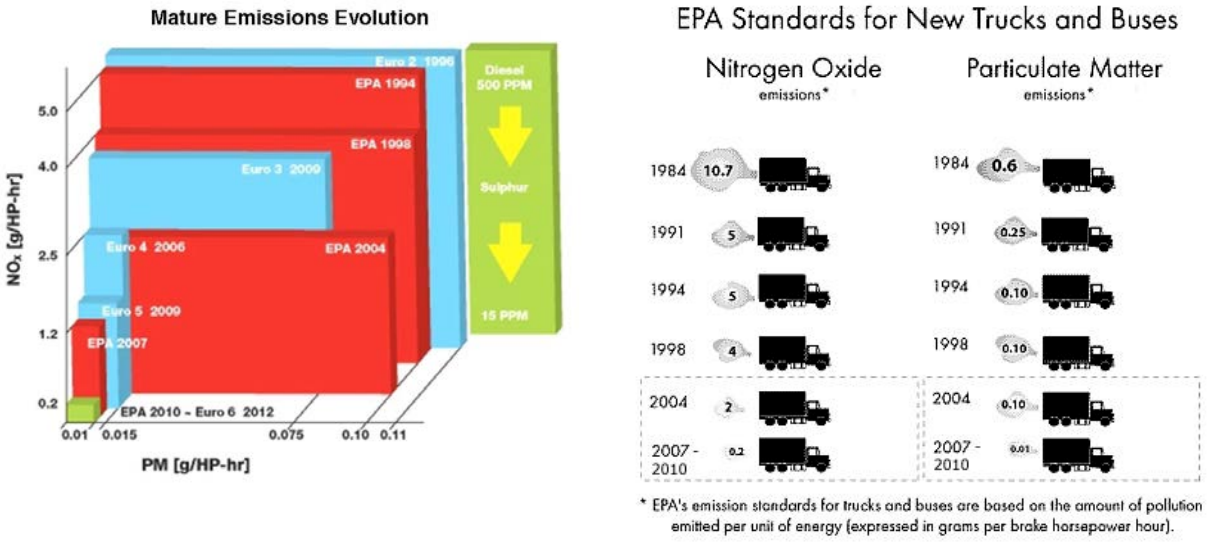
earliest hybrids, leaving TheRide exposed for potential future repairs over the next few years which will need to be monitored and budgeted.

Hybrid manufacturers have shortened the warranty period for new hybrid buses to 2 years, making it highly likely that TheRide would incur additional, significant costs due to older engine failures, or need to budget for extended warranties (~$18,000 per hybrid bus).

Hybrids also require a mid-life battery replacement. TheRide is presently in the process of doing a battery "refresh kits" which is hoped to extend the life hybrid batteries to the 12 year life span of the bus at a cost of about $35,000 per bus.

3. Emissions

The EPA's ongoing emission reduction goals ensure that all new transit buses have very low emissions. All buses in theRide's active fleet are fitted with particulate traps in order to meet EPA emission standards. In 2004, the emission standards for NOx was 2.5g/HP-hr. In 2010, EPA emission standards regulated NOx to 0.2g/HP-hr, resulting in very low emissions for modern Hybrid and Conventional buses. Data has shown that Particulate Matter can be lower or higher in hybrid and conventional diesel buses depending on duty cycles. However, despite the bus technology, PM was always well below the EPA standard. The chart below illustrates how EPA emissions have become stricter over time, forcing transit agencies to become cleaner without regard to the type of bus technology.



Fuel Emission per bus per mile[5]

[5] Adopted using data from TCRP Report 59: Hybrid-Electric Buses: Status, Issues and Benefits (TCRP 2000) and Evaluation of the economics of conversion to compressed natural gas for a municipal bus fleet (Yang 2013).

Avg MPG	Miles/Year	Gallons/Year	Fuel Cost/Year	CO2 emissions (lbs)	Nox emissions (lbs)	PM emissions (lbs)	VOC emission (lbs)
2013 Hybrid							
5.3	34,391	6,489	$ 20,375	144,053	3,828	266	311
		emissions per mile (lbs/mi)		4.189	0.111	0.008	0.009
2013 Low Emission Conventional							
4.3	34,391	7,998	$ 25,113	$ 77,554	$ 4,719	$ 328	$ 384
		emissions per mile (lbs/mi)		5.163	0.137	0.010	0.011
		Difference per year (lbs)		**33,501**	**890**	**62**	**72**
		Difference per mile (lbs)		**0.974**	**0.026**	**0.002**	**0.002**
		$ value of reduced emissions/year		**$ 503**	**$ 445**	**$ 228**	**$ 109**
				$ value of reduced emissions/year			**$ 1,285**
				$ value of reduced emissions over life span (12 years)			**$ 15,420**

According to a report done by the Transit Cooperative Research program[6], the estimated value for the social cost of NO_x reduced is $1000 per ton while for VOCs it's $3000 per ton. According to a study done by Purdue University in 2013 evaluating the economics of a CNG bus fleet[7], the value for the costs of PM is $7384 per ton while for CO_2 it ranges from $15 to $30 per ton. Using the higher value of $30 per ton for CO_2 and incorporating theRide's fleet average annual mileage, the following dating suggests a yearly cost of $1,285 in fuel emission by deciding to use a low emission conventional diesel bus. Over the life span of the bus this amounts to $15,420 in social costs.

4. Noise

Staff looked into the question of the noise difference between Hybrids and Low Emission conventional buses, looking at how sound is perceived, detailed findings on bus noise, and an informal test of TheRide's buses.

[6] TCRP (2000). TCRP Report 59: Hybrid-Electric Buses: Status, Issues, and Benefits. Transit Cooperative Research Program. Transportation Research Board

[7] Yang, L. August 2013. Evaluation of the economics of conversion to compressed natural gas for a municipal bus fleet. <http://onlinelibrary.wiley.com/doi/10.1002/ese3.14/pdf>. Accessed in July 2014

The Transit Research Arena[8] did a recent study analyzing the noise emission from both hybrid and conventional buses. On average, they found that a hybrid runs approximately 72 dB(A) while a conventional runs approximately 75 dB(A). An increase of 10 decibels is perceived as being twice as loud.

TheRide's manufacturer Gilling did testing at the Federal Transit Association's facility in Altoona, PA[9]. They found that their hybrids are only about 1.5 dB(A) quieter than their conventional diesel buses.

a. Sound Perception

First is sound perception— a key component of understanding noise is the difference between sound intensity and perceived sound level. Sound intensity is measured on a logarithmic scale, meaning a difference of 3 decibels represents about twice the sound intensity or acoustic power**. However the human ear does not perceive sound on the same scale—it takes an increase of 10 decibels to be perceived as twice as loud[10].**

Here's a table to illustrate equivalent sound levels corresponding to different decibel readings[11]

[8] Hammer, J. TRA (2014). Alternative Drivetrains in Public Transport – Potentials of Hybrid buses regarding Exhaust and Noise Emissions. Transport Research Arena. <http://www.traconference.eu/papers/pdfs/TRA2014_Fpaper_19962.pdf>. Accessed in July 2014

[9] Gillig (2007). Hybrid Bus Benefits – A Gillig Perspective

[10] Vanderheiden, Gregg 2011. About Decibels (db). < http://trace.wisc.edu/docs/2004-About-dB/#navbar> Accessed September 2014

[11] *Decibal Chart*. Digital image. *Construction Noise Pavement Interactive*. N.p., n.d. Web. Sept. 2014. <http://www.pavementinteractive.org/article/construction-noise/>.

Noise Source (at Given Distance)	Noise Environment	A-Weighted Sound Level	Human Judgment of Noise Loudness (Relative to Reference Loudness of 70 Decibels*)
Military Jet Takeoff with Afterburner (50 ft)	Carrier Flight Deck	140 Decibels	128 times as loud
Civil Defense Siren (100 ft)		130	64 times as loud
Commercial Jet Take-off (200 ft)		120	32 times as loud **Threshold of Pain**
Pile Driver (50 ft)	Rock Music Concert Inside Subway Station (New York)	110	16 times as loud
Ambulance Siren (100 ft) Newspaper Press (5 ft) Gas Lawn Mower (3 ft)		100	8 times as loud **Very Loud**
Food Blender (3 ft) Propeller Plane Flyover (1,000 ft) Diesel Truck (150 ft)	Boiler Room Printing Press Plant	90	4 times as loud
Garbage Disposal (3 ft)	Higher Limit of Urban Ambient Sound	80	2 times as loud
Passenger Car, 65 mph (25 ft) Living Room Stereo (15 ft) Vacuum Cleaner (10 ft)		70	Reference Loudness **Moderately Loud**
Normal Conversation (5 ft) Air Conditioning Unit (100 ft)	Data Processing Center Department Store	60	1/2 as loud
Light Traffic (100 ft)	Large Business Office Quiet Urban Daytime	50	1/4 as loud
Bird Calls (distant)	Quiet Urban Nighttime	40	1/8 as loud **Quiet**
Soft Whisper (5 ft)	Library and Bedroom at Night Quiet Rural Nighttime	30	1/16 as loud
	Broadcast and Recording Studio	20	1/32 as loud **Just Audible**
		10	1/64 as loud
		0	1/128 as loud **Threshold of Hearing**

Source: Compiled by Kimley-Horn and Associates, Inc.

b. MTA Bus Noise Analysis

Staff also found more detailed research on bus noise. Researchers looked at the Maryland Mass Transit Administration (MTA) and analyzed noise emissions between different bus technologies[12].

Analyzing idling noise levels, Hybrids demonstrated 2 dBA reduction compared to standard diesel buses. The biggest difference can be seen if the bus is put into full throttle while idling, with the conventional buses reaching the level of their standstill pass-by sound.

Accelerating from a standstill, the hybrids are 2 dBA quieter than conventional buses. At speeds of 30 MPH, hybrids are 3 dBA quieter than conventional buses and approaching speeds of 40 MPH hybrids are just 1 dBA quieter. When analyzing exterior pass-by sound levels, MTA found no difference between

[12] Staiano, Michael 2007. A comparison of green and conventional diesel bus noise levels. <http://staianoengineering.com/images/NC07_Ross_Staiano_-_A_comparison_of_green_and_conv.pdf> Accessed August 2014

hybrid and conventional buses at constant speeds: *"These data suggest that hybrids provide no significant benefits under acceleration operations per industry-standard tests. While hybrids appear to be quieter in stationary operations and may produce lower noise emissions under acceleration, there is no justification for assuming sound level reductions for hybrid buses under acceleration."*

Idling Sound Levels (dBA)				Pass-By Sound Levels (dBA		
Powertrain	Low Idle	High Idle	Full Throttle	Powertrain	Constant Speed	Standstill
conven.	65	69	77	conven.	76	77
hybrid	64	67	70	hybrid	76	75
difference	**1**	**2**	**7**	difference	**0**	**2**

In addition, MTA found that *"The Gillig buses are significantly quieter (at 95% probability level) than the other manufacturers for acceleration at a constant speed—although narrowly not significant for acceleration from standstill.* ***Thus, manufacturer design choices may be more significant than diesel powertrain in noise emissions****."*

c. Informal test of TheRide Buses

Staff conducted an informal analysis at the Blake Transit Center, decibel measurements were collected standing approximately 10 feet from the entrance of an idling bus. Between the two bus technologies, there was a 1-2 decibel difference on average. The informal test data are consistent with Gillig's assertion that their hybrids are 1.5 decibels quieter than standard conventional buses[13].

Below are some readings from the informal analysis. A more formal analysis would need to be conducted to normalize and verify precise sound levels.

(*On the left is a 2011 Hybrid 40' bus, on the right is a 2003 Conventional diesel 40' bus.)*

[13] Gillig (2007). Hybrid Bus Benefits – A Gillig Perspective

5. Reliability

Hybrids' small market share and increased complexity has been a challenge to operations and reliability. Particularly, there have been some serious, significant repairs needed for hybrid buses that have kept them out of service for weeks and months at a time. In an operation that depends on a reliable fleet, this is a serious concern. The small size of the dealer network and low service quality offers insufficient support. Internally, it has been difficult to find skilled technicians for heavy-duty hybrid maintenance and training opportunities. Because of these concerns, staff strongly caution against increasing the proportion of hybrids in the fleet.

6. Dedicated Routing

As suggested by the board, dedicated routing, operating a particular fixed-route using either a conventional or hybrid bus, offers some potential benefits. Hybrid buses achieve maximum fuel efficiency when operated in heavy stop-and-go traffic. Conventional buses are better suited on longer routes with fewer stops.

It is clear that TheRide's Express routes are better served using conventional buses because at highway speeds there is minimal, if any, difference in fuel economy compared to hybrid buses. Currently, TheRide's two commuter service routes, ExpressRide Canton and ExpressRide Chelsea, are operated by 2013 Low Emission Conventional buses. The average fuel economy on Express routes is 5.6 MPG.

In comparison, 2013 Hybrid buses operating local fixed-route service achieve on average 5.3 MPG while 2013 Low Emission Conventional buses get 4.3 MPG. Staff has started to analyze a week of bus operations to determine the effect of routing. However, the data is difficult to extract because of the intricate nature of routing buses, through-routing, driver switches, etc and there are not yet clear recommendations for improved efficiency. There are some preliminary interesting insights regarding the variety among buses operating during the week of study, some buses seem to operate much more or less efficiently than other "peer" buses from the same year/technology, despite similar routing. Note that bus operators also have a significant influence over fuel economy. On average, improved driving techniques can lead to a 5% reduction in fuel consumption. (Ecodriving 2005)

Staff will continue to look into individual buses characteristics, bus technology, incidental traffic or construction, and operator technique as they affect fuel economy. Because of the multivariate impacts on fuel economy, it is likely that TheRide will need to adopt a multipronged approach to optimize fleet usage. Note that Title VI looks at discrepancy in distribution of bus technology/emissions which would also need to be taken into consideration.

7. Industry Trends

a. Manufacturer Data

TheRide's manufacturer Gillig released production numbers of their hybrid buses the last few years. In 2010, Gillig reported that 30% of their total bus production was hybrids. In 2014, hybrid production decreased by about half to 15.3% of total bus production.

Hybrid production as a percentage of total bus production, Gillig

Year	Total Hybrid production
2010	30%
2011	22.4%
2012	20.6%
2013	17.5%
2014	15.3%

Gillig's representative shared this insight:

"The two main reasons for the decline is one — clean diesel is just as clean as the hybrids and two — the additional cost of a hybrid is never recovered. The ROI is not there." ***Jim Ryan, Gillig***

b. Agencies that no longer buy hybrids

In recent years, transit agencies in the US have been purchasing new conventional buses over hybrids. In March, the Spokane Transit Authority (STA) purchased eight new conventional buses with energy saving features[14].

"The bottomline is that with more efficient low-sulfur diesel engines, especially when equipped with modestly priced technology that removes much of the parasitic load off the engines, the fuel savings between a hybrid and a regular diesel bus is not as compelling as it was several years ago. We could no longer make a persuasive case to incur the increased capital cost of the hybrid vehicle," ***Steve Blaska, STA Operations Director***

In July 2013, the Metropolitan Transportation Authority (MTA) in New York City decided to phase out 389 of its hybrid-electric engines in favor of conventional diesel ones. The five year warranty for its fleet of hybrid buses was set to expire making repairs more costly and the MTA was faced with a tough decision.

"Maintenance workers constantly have to repair hybrid engines. The electric-traction motors are burning out. They're so expensive to replace that it'll be cheaper to stick a diesel engine in there…(hybrid components) are the most expensive components on the bus, and these replacements have resulted in significant and ongoing costs."
Kevin Ortiz, MTA Deputy Director for External Communications

[14] Prager, Mike. March 10, 2014. STA Giving All-Electric Buses a Tryout. <http://www.spokesman.com/stories/2014/mar/10/sta-giving-all-electric-buses-a-tryout/> Accessed July 2014

The hybrid buses that the MTA uses conform to 2004 EPA emission standards, while the new diesel meet 2007 stricter standards.

"When we first went with the Hybrid in 2004 that was the way to go. The diesel is better than the hybrid now."
Henry Sullivan, MTA Chief Maintenance Officer

c. Agencies have continued to buy hybrids

However, there are some agencies that are continuing to buy hybrids. Some examples are:

WMATA: DC's Washington Metropolitan Area Transportation Authority (WMATA) awarded NABI a 5-year contract for the procurement of 654 buses in July 2013[15]. The first order of 85 NABI diesel-electric buses will be delivered sometime in the summer of 2014. The new buses are being funded by Moving Forward, Metro's 5 billion capital program which is made possible by support from the region's Congressional delegation and jurisdictional partners in Virginia, Maryland and DC.

"This contract award will allow us to replace older, less efficient buses and advances our commitment to reducing emissions and improving fuel economy for years to come," ***Richard Sarles, Metro General Manager and CEO.***

The WMATA has the option to purchase up to 498 additional 42-foot buses and up to 71 60-foot buses over a five year period. It has the option to purchase either hybrids or CNG buses.

SEPTA: In March 2012, the Southeastern Pennsylvania Transportation Authority secured a bus procurement of 245 new hybrid buses from Nova Bus[16]. Low Emission Conventional buses were originally programmed into the $171 million contract, making SEPTA responsible for the additional cost of hybrid buses. They used federal formula funds for 160 hybrids for the first two years; the organization is still determining how to secure additional funds for the remaining 85 hybrids. Part of the incremental cost of the 160 hybrids was covered by a $5 million grant provided by the Clean Fuels Grant Program. Specifically, they used FY 2011 Clean Fuels grants, FY 2011 Bus and Bus Facilities State of Good Repair grant, and FY 2012 Clean Fuels grant. In addition, SEPTA used FTA Section 5307 and Section 5339 formula funding and CMAQ funds to support the additional cost of the hybrids.

Richard Burnfield, SEPTA chief financial officer, believes hybrids make financial sense from an operating perspective; however the organization cannot afford the incremental cost of hybrids without additional grant funding.

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[15] Washington Metropolitan Area Transportation Authority 2013. Metro awards contract for new buses to create all-low floor fleet [press release].
<http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=5545> Accessed August 2014
[16] Fisher, Christine 2012. SEPTA working to add 245 hybrid buses.
<http://planphilly.com/articles/2012/12/05/septa-working-add-245-hybrid-buses> Accessed September 2014

d. UM bus purchases

The University of Michigan first introduced four hybrid buses in January 2012 as part of the university's sustainability initiative titled Planet Blue[17]. As of October 2013, they are a total of 10 hybrid buses in university's fleet of 58[18]. The first seven hybrids cost approximately $520,000 each, however, UM's buses do not require additional features such as wheelchair ramps, fare boxes and security cameras compared to the additional costs required for service for TheRide's fleet.

University of Michigan plans to have an entire fleet of hybrids buses by 2025, they will purchase 45 hybrids over a span of 12 years. According to UM, their hybrids cost an additional $175,000 compared to conventional buses. The University spent $3.6 million on their first seven hybrid buses; however, they received $700,000 in federal funding to cover the additional cost of the hybrid[19]. Steve Dolen, Director of Parking and Transportation Services, states that the university would be open to other alternatives such as CNG or electric if they are viable options in the future.

The University estimates that their first seven hybrids bought combined for an annual fuel savings of $44,000 or approximately $6,285 per hybrid bus. With their current total of 10 hybrid buses, their estimated combined annual fuel savings is approximately $62,857. Mr. Dolen also stated that their hybrid buses average fuel economy is 5.8 MPG while TheRide's 2013 hybrids get 5.3 MPG. The University's environment is more conducive to hybrid buses because there is more stop-and-go traffic allowing the hybrid to benefit more from the regenerative braking system.

8. Technology Research

There is academic research being conducted that will be of value to the industry and assist in answering key efficiency questions. Especially beneficial research is being conducted by University of Minnesota engineering professor David Kittelson, who is in the process of completing a two-year study on cost-effective measures regarding bus efficiency[20]. "Our project really is to see where all the energy goes in propelling a bus," said Kittelson.

Kittleson's research leads him to believe that manufacturers can achieve higher fuel savings at a much lower cost by powering air conditioning and cooling systems with separate batteries. Using electric batteries, separate from the drivetrain, to power these systems has the potential to improve a bus' fuel economy up to 15% with an increase in cost of only 5% ($20,000 per bus) as opposed to hybrids' 30% increase in fuel efficiency with an increase in cost of 49% ($195,000).

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[17] Broekhuizen, Kim 2012. First Hybrid Buses Arrive on Ann Arbor Campus. < http://www.ur.umich.edu/update/archives/120105/buses> Accessed July 2014

[18] Woodhouse, Kelli 2013. University of Michigan adds 3 more hybrid buses to fleet. < http://www.mlive.com/news/ann-arbor/index.ssf/2013/10/university_of_michigan_adds_3.html> Accessed September 2014

[19] Woodhouse, Kelli 2012. University of Michigan sustainability initiative brings 3 more hybrid buses to campus. < http://www.annarbor.com/news/university-of-michigan-introduces-new-hybrid-buses-to-campus/> Accessed September 2014

[20] Haugen, Dan 2013. Research seeks best bang-for-buck on bus efficiency. <http://www.midwestenergynews.com/2013/09/16/research-seeks-best-bang-for-buck-on-bus-efficiency/> Accessed in August 2014

One of the final goals of Kittleson's research effort is to develop software that will enable transit agencies to estimate fuel economy gains of hybridization and electrification of bus accessories. Inputs of speed, grade, and time histories of a specific route along with ambient condition and bus characteristics would be used to estimate fuel consumption. As seen in the Dedicated Routing section below, these are areas where it would take significant programming to create meaningful information from our data on an ongoing basis. Though, we are exploring fuel efficiencies by route and driver as part of this project, the data is not yet conclusive.

9. Next Steps and Staff Recommendations

a. Purchasing Buses: Low Emission Conventional Buses vs Blended Strategy

PDC requested that staff look into a "blended" strategy of possibly purchasing a mix of both hybrids and low emission conventional buses, maintaining TheRide's current hybrid bus ratio. For the first order of buses, 27 buses will be purchased. In order to maintain TheRide's hybrid ratio, TheRide would need to purchase 6-7 hybrids out of the 27. Three scenarios follow—purchasing just low emission conventional buses, purchasing 6 hybrids and 21 low emission conventional buses, and purchasing 7 hybrids and 20 low emission conventional.

Scenario 1: 0 Hybrids

27 Low Emission Conventional buses	$ 12,293,046
0 Hybrids	$ 0
Extended Warranties (Hybrids)	$ 0
Battery replacement (Hybrids)	$ 0
Total Costs	$12,293,046
Available Funds	- $12,293,750
Surplus	$ 704

Scenario 2: 6 Hybrids

21 Low Emission Conventional buses	$ 9,561,258
6 Hybrids	$ 3,904,578
Extended Warranties (Hybrids)	$ 108,000
Battery replacement (Hybrids)	$210,000
Total Costs	$13,738,836
Available Funds	$12,293,750
Shortfall of Local Funds	$(1,490,086)
Equivalent service hours (leveraged)	(23,937)
Equivalent rides	(777,957)

Scenario 3: 7 Hybrids

20 Low Emission Conventional buses	$ 9,105,960
7 Hybrids	$4,555,341
Extended Warranties (Hybrids)	$ 126,000
Battery replacement (Hybrids)	$245,000
Total Costs	$14,032,301
Available Funds	$12,293,750
Shortfall of Local Funds	$(1,738,551)
Equivalent service hours (leveraged)	(27,929)
Equivalent rides	(907,677)

Both hybrid scenarios illustrate a funding shortage. TheRide has a few ways that it could attempt to cover these additional costs of $1.49M or $1.74M:

1. Operating: Reduce Service
2. Capital: Delay Bus Replacement
3. Capital: Reducing other Capital projects
4. Capital: Use Estimated Capital Surplus in Future Years

First, and least recommended, would be reducing service. This would affect TheRide's core mission and interfere with promises made to voters in the Five Year Transit Improvement Program. For instance, the $1.5M of local funds needed for the incremental cost of six hybrids is the equivalent to 778,000 riders or 24,000 service hours. Equivalent service hours and riders are included in the tables above.

Second, the simplest, would be to cover the funds needed for the hybrid increment by reducing the total number of buses ordered and maintain three additional 2003 Conventional vehicles in the fleet past their planned replacement date. TheRide has already delayed replacement of nine 2003 buses until 2017 when more capital funds would be available, ensuring that current capital needs were covered. This option would bring that number to 12 2003 Conventional buses, which were built under older EPA Emission guidelines.

Third, would be to use federal formula funds in the Capital and Categorical Grant program budgeted for other projects. This would postpone or reduce projects underway such as the planned Ypsilanti Transit Center Rehabilitation, replacement of key software systems, Superstops, or Shelters, etc until capital funds became available. Chris White will be preparing to discuss this more in detail at the October committee meetings with the Capital and Categorical Grant program.

Fourth, would be to use projected surplus in the Capital program in later years (2016-18) for a subsequent bus order in 2017 or 2018. The current Capital and Categorical Grant program shows a projected surplus for 2016, 2017, and 2018. This would allow staff time to implement and monitor the rollout of the 5YTIP and address any unanticipated associated funding needs, search for other funds, and

research other bus technologies. Again, Chris White will be preparing to discuss this more in detail at the October committee meetings.

The 5YTIP funding request included funds for new Conventional buses for new services. To have purchased all of the new buses in the next 5 years as Hybrids, the millage ask would have been 0.14 mill higher for a total of 0.84 mills. To purchase 6 hybrids, the millage would be increased by 0.04 mills, and for 7 hybrids, the millage would be increased by 0.05 mills.

In October-December 2014, the board will discuss and approve TheRide's FY2015 Capital and Categorical Grant program which can more fully discuss the capital funding options.

b. Purchase Recommendation

Based on the research described above, staff recommend purchasing all low emission conventional buses for the first bus order (delivery starting in November 2015) as the most appropriate option that balances benefits and costs.

Buying Hybrid buses, with dedicated grants, has been a good strategy in the past, helping TheRide be more environmentally responsible. However, low emission conventional buses are TheRide's best option for this bus order. Continuing to buy hybrids jeopardizes TheRide's ability to deliver service, because of longer-term and higher cost maintenance issues associated with hybrid buses. In addition, modern Low Emission Conventional buses are among the lowest emission vehicles and can be purchased at a reasonable cost. Lastly, TheRide does not have dedicated grants available for the incremental cost of hybrid buses. Research and TheRide's experience demonstrates that though Hybrids have lower emissions and slightly lower noise output than low emiision Conventional buses, TheRide will not see sufficient return on investment to justify spending funds that could be used for service or other essential projects.

Per PDC direction, staff are developing a timeline and recommendation for the next bus order (or as necessary, a new purchase) with particular focus on CNG, electric, other technologies, and/or higher capacity buses.

c. Additional Next Steps

Additionally, TheRide will

1) Continue to use technologies to reduce its carbon footprint: ultra-low sulfur diesel, biodiesel, particulate filters, and electronically controlled cooling fans.
2) Continue to promote transit and non-motorized options and provide education to community as the most environmental, cost-effective modes. The use of buses displaces the number of single passenger trips thus reducing Greenhouse Gas emissions.

3) Continue to proactively search for sources of federal funds to cover the additional capital cost of alternative bus technologies.
    a) Re-investigate cost-effectiveness and emission reduction of Natural Gas. Note: natural gas buses would require a separate bus procurement and sufficient lead time. Natural gas is less expensive than diesel and has low emissions; however, there would be significant capital costs, purchasing process, and logistics to install a fuelling station.
    b) Evaluate articulated buses as a way to decrease costs on the most heavily-used routes and using smaller buses on less populated routes.
    c) Monitor Fuel Cell developments (Next generation Hybrids). These are not yet mature or readily available.
    d) Monitor Electric Bus developments. These are not yet mature or readily available. Current costs run ~$1M/bus.
4) (Re)train drivers on "eco-driving" skills for both hybrid and conventional buses.

    Training would help drivers acquaint themselves with the hybrid bus and help improve the fuel economy of trips on all buses. On average, it has been shown that improved driving techniques results in a 5% reduction in fuel consumption[21]. Training would be a cost-effective measure to reduce fuel emissions on hybrid buses and decrease fuel costs. It would also help TheRide in its mission to be environmentally responsible.
5) Develop an Environmental Policy and Plan with the board in early FY2015 [see samples in Addendum].

    A comprehensive environmental policy or plan would assist the board in setting and monitoring goals for the agency to meet its Mission and as a guide for future decisions, while allowing staff to research and recommend the most effective ways of reaching those goals.

    Historically, TheRide has been an industry leader in taking steps to ensure reducing its environmental impacts. TheRide staff are in the process of drafting a comprehensive environmental policy for the organization as a whole which would include several aspects of how TheRide might go about fulfilling its Environmentally Responsible mission such as increasing ridership, decreasing greenhouse gas emission, and reducing energy consumption.

    Included in the effort, staff, working with the board, would propose clear and concise goals for the organization. In order to set these goals, staff will review TheRide's environmental impacts thoroughly and establish baseline measures. The board, working with staff, would then develop objectives and targets to further reduce environmental impacts which would be monitored, managed, and reported to the board. This would serve multiple purposes. First, it would clearly manifest how TheRide is meeting a key part of its Mission for the public, board, and employees. Second, it would provide staff clear policy goals for future decisions and recommendations.

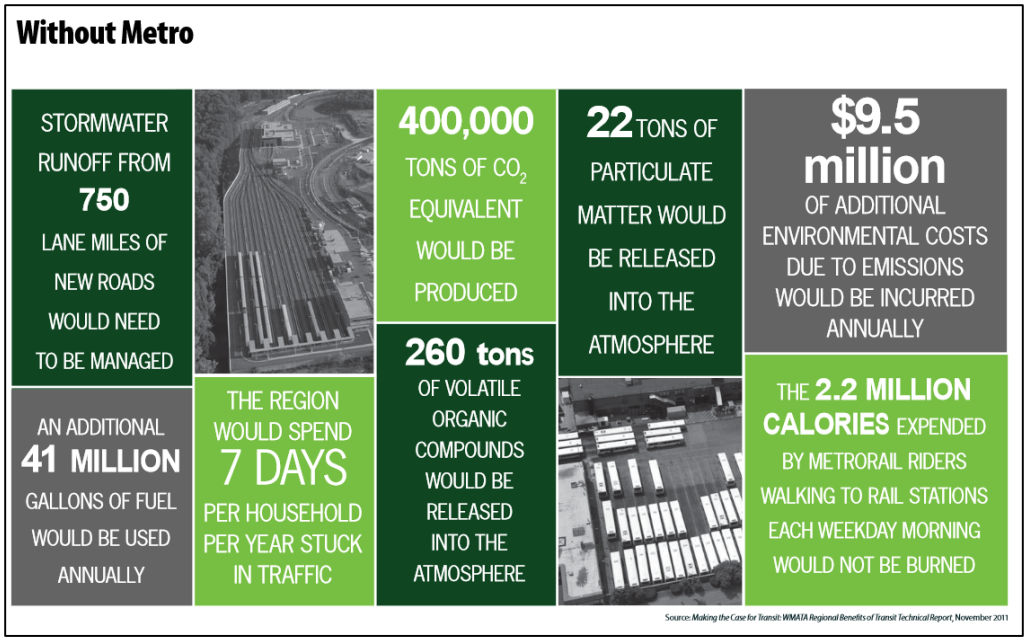
[21] Ecodrivng: the smarting driving style (September 2005).
<http://www.thepep.org/ClearingHouse/docfiles/ecodriving.pdf > Accessed in July 2014

Addendum: Environmental Policy Examples

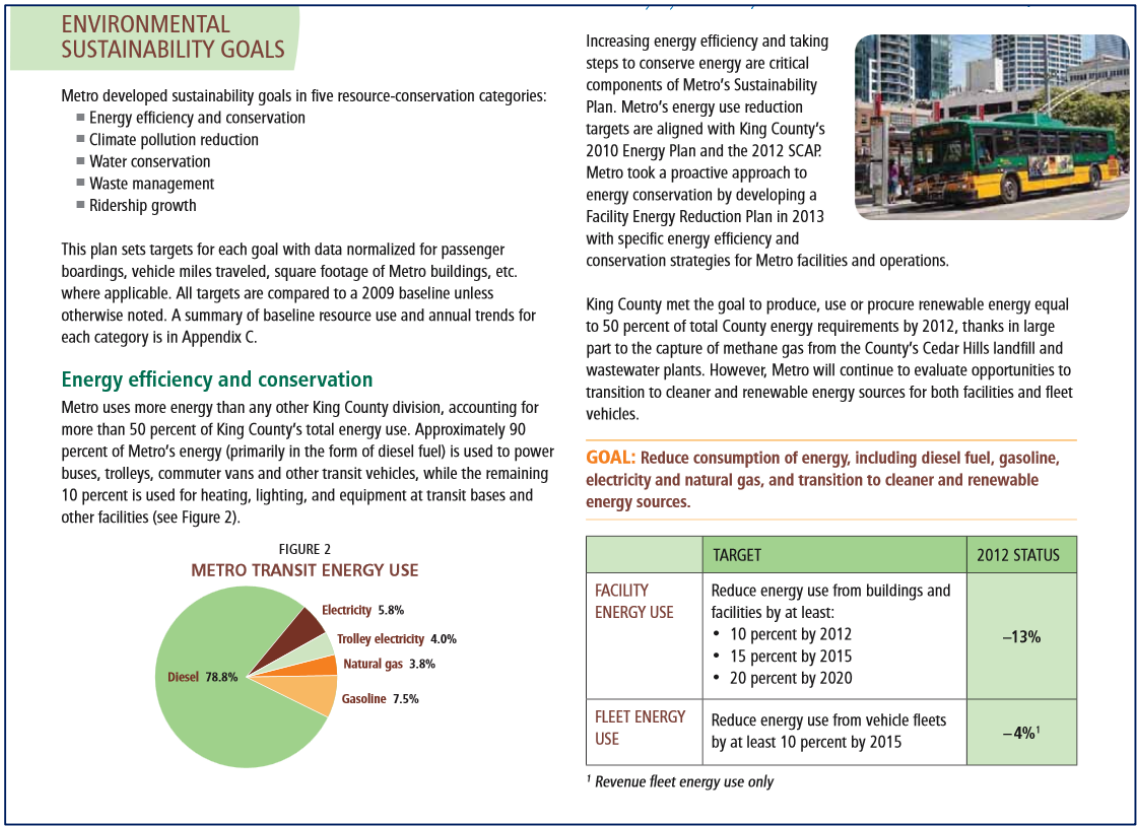
Many transit agencies have implemented environmental policies and sustainability initiatives to become more environmentally responsible. These efforts seek not only to reduce environmental impacts of transit services but operations as a whole. These organizations have established ambitious goals to maximize ridership, decrease greenhouse gas emissions and decrease energy consumption. For instance, Washington Metropolitan Area Transit Authority (WMATA) and King Country Metro Transit have developed sustainability initiatives recently. Excerpts from their plans follow.

The charts below summarizes some of the targets and impacts for the WMATA for its sustainability plan[22].

[22] Metro's sustainability agenda < http://www.wmata.com/Images/Mrel/MF_Uploads/sustainability-web-2014-04-22.pdf>



Below an excerpt from King Country Metro Transit's sustainability announced in April. [23]



ENVIRONMENTAL SUSTAINABILITY GOALS

Metro developed sustainability goals in five resource-conservation categories:

- Energy efficiency and conservation
- Climate pollution reduction
- Water conservation
- Waste management
- Ridership growth

This plan sets targets for each goal with data normalized for passenger boardings, vehicle miles traveled, square footage of Metro buildings, etc. where applicable. All targets are compared to a 2009 baseline unless otherwise noted. A summary of baseline resource use and annual trends for each category is in Appendix C.

Energy efficiency and conservation

Metro uses more energy than any other King County division, accounting for more than 50 percent of King County's total energy use. Approximately 90 percent of Metro's energy (primarily in the form of diesel fuel) is used to power buses, trolleys, commuter vans and other transit vehicles, while the remaining 10 percent is used for heating, lighting, and equipment at transit bases and other facilities (see Figure 2).

FIGURE 2
METRO TRANSIT ENERGY USE

Increasing energy efficiency and taking steps to conserve energy are critical components of Metro's Sustainability Plan. Metro's energy use reduction targets are aligned with King County's 2010 Energy Plan and the 2012 SCAP. Metro took a proactive approach to energy conservation by developing a Facility Energy Reduction Plan in 2013 with specific energy efficiency and conservation strategies for Metro facilities and operations.

King County met the goal to produce, use or procure renewable energy equal to 50 percent of total County energy requirements by 2012, thanks in large part to the capture of methane gas from the County's Cedar Hills landfill and wastewater plants. However, Metro will continue to evaluate opportunities to transition to cleaner and renewable energy sources for both facilities and fleet vehicles.

GOAL: Reduce consumption of energy, including diesel fuel, gasoline, electricity and natural gas, and transition to cleaner and renewable energy sources.

	TARGET	2012 STATUS
FACILITY ENERGY USE	Reduce energy use from buildings and facilities by at least: • 10 percent by 2012 • 15 percent by 2015 • 20 percent by 2020	–13%
FLEET ENERGY USE	Reduce energy use from vehicle fleets by at least 10 percent by 2015	–4%[1]

[1] *Revenue fleet energy use only*

[23] King Country Metro Transit Sustainability Plan (April 2014) <http://metro.kingcounty.gov/am/reports/2014/metro-sustainability-plan-2014.pdf>

TheRide is hoping to implement similar sustainability measures; historically TheRide has been an industry leader in taking steps to ensure reducing its environmental impacts. TheRide recognizes its role in the local community and how developing a through sustainability plan can further strengthen this role.

TheRide hopes to evaluate a baseline of both greenhouse gas emissions and energy consumption for operations as a whole and establish ambitious goals to further reduce its environmental impact. By offering accessible, safe, efficient, reliable public transportation options TheRide is helping to reduce the number of single-occupant vehicles on the road. As a result, TheRide reduces emission by providing services that take motor vehicles off the road and reduce traffic congestion.

Through this sustainability plan, TheRide aims to comply with the American Public Transportation Association (APTA) Sustainability Commitment which include a core set of actions on sustainability.

Resolution 1/2015

APPROVAL OF CONTRACT AWARD FOR ARIDE PARATRANSIT SERVICES

WHEREAS, the Ann Arbor Area Transportation Authority (TheRide) issued Request for Proposal (RFP) # 2014-01 "Paratransit Service Providers" for the purpose of identifying firms to deliver para-transit services, and

WHEREAS, seventeen companies downloaded the RFP from the Michigan Intergovernmental Trade Network (MITN) and ten companies took part in the pre-bid conference, and

WHEREAS, two proposals were received, and

WHEREAS, TheRide staff, along with two (2) Local Advisory Council (LAC) Executive Board Members and the consultant, RLS Associates, Inc. evaluated the proposals using the criteria established within the RFP and determined that the submittal from SelectRide, Inc. of Ann Arbor, Michigan was found to be most responsive and responsible, and

WHEREAS, the cost of service is expected to exceed $100,000, and Board policy requires advance authorization to incur products or services over $100,000, and,

WHEREAS, TheRide requires SelectRide to comply with a high standard of vehicle maintenance and the Authority conducts periodic vehicle safety and performance inspections to monitor compliance of the SelectRide vehicle fleet, and

WHEREAS, TheRide will continue its commitment to monitor and enforce high quality standards identified within the Contract for the safety and quality of SelectRide's vehicle fleet,

NOW, THEREFORE, BE IT RESOLVED, that the Ann Arbor Area Transportation Authority Board of Directors authorizes the Chief Executive Officer to enter into a contract with Select Ride, Inc. of Ann Arbor beginning May 1, 2015 for providing A-Ride (demand response paratransit service) for a three year contract term (with a single two-year option) award amount for a not-to-exceed price of $10,723,182.

_____	_____
Charles Griffith, Chair	Susan Baskett, Secretary
October 16, 2014	October 16, 2014

Presented to PDC 10-07-14
Issue Analysis: TheRide Paratransit Service Contract

The Questions:

Should the Ann Arbor Area Transportation Authority enter into a five year contract with SelectRide for paratransit services?

Summary and Staff Recommendation:

The current Paratransit contract ends on April 30, 2015. After extensive information-gathering, consultant assistance, program analysis, and competitive procurement process, TheRide staff recommends that TheRide Board move toward allowing staff to complete negotiations and finalize a contract with Select Ride, Inc. for the delivery of para-transit services over the next five years beginning May 1, 2015. As designed the contract changes the paratransit delivery model from a full turnkey operation to a partial turnkey operation in which TheRide will maintain more control over the service delivery. The agreement would be a guarantee of a three year contract with an optional, single two-year extension. This approval would allow TheRide staff to negotiate a fixed price structure with the current provider.

Background:

TheRide currently contracts to deliver A-Ride (ADA Paratransit) and Good as Gold (senior service). These services are important to the community with 122,500 trips delivered in FY 2013, and 134,200 in FY 2012. The current service delivery model is a full turnkey operation delivered by one provider under one service contract. This model has been in service since 2005.

This is TheRide's largest service contract with an annual expense of $3.2 million dollars. TheRide last released a Request for Proposal (RFP) for Paratransit Services in 2010. At that time, Select Ride, Inc. was awarded a one year contract with two one year renewal options to deliver service.

In July of 2013, TheRide Board exercised its authority by authorizing the CEO to negotiate an extension to the current contract through April 30, 2015. This was completed in September 2013. During this time the Authority created an internal team to review service performance and delivery. The team identified many goals including an appropriate delivery model for TheRide and creating and releasing an RFP. The Team identified a few major goals, the first better control over the operation, and a service contract to meet the goals of the Five Year Implementation Plan

The team released an RFP for technical assistance in October 2012. RLS and Associates, was hired to assist the team in its review and development of the RFP. The team instructed RLS of the goals to increase control over service, reduce outsourcing risks, and scale service to meet the future expansion needs.

RLS reviewed the current delivery model, current operational costs and compared the performance of our service with peers. Based on our stated goals RLS recommends the Authority take ownership over multiple service delivery aspects as opposed to outsourcing them. These delivery aspects are defined below:

CURRENT MODEL	**PROPOSED MODEL**
FULL TURNKEY 1 PROVIDER • **1 Provider** • **Provider Schedules & Dispatches All Trips** • **Provider Owned & Operated Fleet** • **Provider Transports All Trips** • **Provider Owned Mobile Data Terminals** • **Provider Owned Dispatch Software** • **Provider Owned Call Monitoring & Distribution**	**PARTIAL TURNKEY 1 PROVIDER** • **1 Provider** • **AAATA Schedules Advance Trips** • **AAATA Owns Fleet of Accessible Buses** • **AAATA reimburses for Fuel Costs** • **AAATA Owns Schedule/Dispatch Software** • **AAATA Owns IVR/Call System** • **AAATA Owns Mobile Data Terminals** • **Provider Schedules & Dispatches Same Day Trips** • **Provider Dispatches Advanced Trips**
BENEFITS • **Decreased Costs To Authority** • **Award Goes to Most Responsive Provider** • **Improved Service Efficiencies** • **Improved Customer Service** • **Consistent Service Delivery**	**BENEFITS** • **Increased Authority Control** • **AAATA More In Control** • **Scalable on AAATA's Terms** • **Improved Customer Service** • **Consistent Service Delivery** • **Increased Efficiencies** • **Decreased Provider Start Up Costs**
VULNERABILITIES • **Arm's Length/Contract Management Authority Control/Ownership** • **Provider Becomes Leader** • **Provider Must Obtain Loans for Start-Up** • **Efficient Scheduling Not in Best Interest** • **Prone to Increased Delivery Costs** • **Scalable on Providers Terms** • **Decreased Competition** • **Prone to Single Provider Pull-Out**	**VULNERABILITIES** • **Arm's Length/Contract Management Authority Control/Ownership** • **High Start Up Costs For AAATA** • **Additional Labor Costs for AAATA** • **Prone to Single Provider Service Disruption**

The Authority, in collaboration with RLS consulting, proposed the new service delivery model to TheRide Board directed, and the Local Advisory Board recommended, as part of the Five Year Implementation Plan. TheRide Board and Local Advisory Council (LAC) told staff to develop an RFP with this model.

TheRide staff and RLS then developed an RFP for a 5 year service contract (3 years plus, one 2 year option) which was released in June 2014. The RFP was released on many different websites and periodicals such as: Washtenaw County News, Passenger Transport, AAATA's website, TransitTalent website, and the State of Michigan Mitten Procurement System which information is then also released to the national website Bidnet. Formal proposals were due on August 4, 2014. The Authority had seventeen companies download the RFP and had ten companies take part in the pre-bid conference.

The Authority received two proposals on August 4, 2014. One being from Select Ride (the current A-Ride provider) and the other from Blue Cab (the current Night-Ride provider). Staff was concerned with the number of participants in the pre-bidders meeting and the resulting number of received proposals. TheRide's purchasing department surveyed the non-bidding companies for this information. The comments ranged from capital

investment concerns to market competitiveness. (A summary of these comments can be found in Exhibit 1) TheRide staff consulted with RLS and concluded that there was not any deficiencies with the RFP.

Having two compliant proposals, TheRide followed its Procurement Guidelines and identified an evaluation team that included stakeholders from TheRide staff, two LAC Executive Board members, and RLS, and conducted evaluations. The evaluations were completed on August 19, 2014 and interviews were scheduled for August 26, 2014. (Please refer to Exhibit 2 summary of the interviews.)

Implications of the Service Change

Arguments in favor of TheRide pursuing a long term contract with Select Ride:

- Increased Authority Control
  - By returning the Advance Reservation call-center in-house TheRide can maintain control and deliver the scheduling of all federally required ADA Paratransit trips. This also allows TheRide to present a uniform fleet of accessible buses, branded with TheRide insignia to the community.

- Increased competition
  - The Incumbent provider will not have total control over all aspect of the delivery model. This better equalizes vendor proficiencies required to submit future competitive bids.

- Improved customer service
  - This allows TheRide to immediately improve upon scheduling efficiencies, implement service improvements, and have direct contact with customers when scheduling advanced trip reservations.

- Better oversight and direct response to customer
  - This allows TheRide management and staff to immediately address and resolve advance reservation issues with the customer.

- Removes exclusive provider operational control
  - This removes the provider from the delivery of advance reservations, a federally required aspect of paratransit services. This also removes the vendors control over the entire fleet of required accessible buses to meet demand.

- Increased efficiencies and dynamic changes
  - This allows TheRide to implement new technology improvements that will improve and enhance the method of scheduling trips and communicating with customers, such as web-based scheduling, advance trip-notification calls and you're ride is here calls,

- Decreased provider capital start-up costs
  - Providers may account for fuel reimbursement from TheRide, reduced staffing needs, reduced fleet costs, reduced software costs and reduced hardware costs.

- Known contract rates for the next five years
  - This permits TheRide to project service costs over a five year period.

Risks / Issues of TheRide pursuing a long term contract with Select Ride:

- Political Misunderstandings
  - None anticipated with selected bidder

- Current Provider Disturbances
  - None anticipated with selected bidder

- Reprioritization of Current THE AUTHORITY Projects
  - TheRide has consider the time and cost requirements to establish and implement an in-house call-center and procure and equip a fleet of accessible buses. These were included in the FY2015 budget and Work Plan.

- Training and start-up work for a new provider
  - The provider will be proficiently trained in the use of Trapeze software for dispatching and trip monitoring.

- Training and staffing a new call center operated by the Authority
  - TheRide staff will be proficiently trained in the use of Trapeze software for dispatching and trip monitoring.

- Order and equip new A-Ride vehicles
  - TheRide will procure and equip the entire fleet of accessible buses with on-board computers for trip dispatching and monitoring as well as cameras for security and customer service.

Staff Finding / Recommendation:

Having weighed the positive outcomes, risks, and issues listed above both internally and in discussions with the LAC, staff recommends that the Board approve staff to finalize a contract with SelectRide that adheres to the RFP, the final cost figures provided in Exhibit 4, and delivers service as defined in the RFP for the next three years with a two year extension.

What if the Board decides not pursue a contract or if final negotiations fail to produce agreement?

- Staff would plan to release a new RFP within the next few months.

- Staff would seek and emergency extension OR anticipate service disruptions due to a new provider not having sufficient time to deliver service by May 1, 2015 (the end of this current contract).

Exhibits:

1. Service Area Map……..page 5
2. Survey of the ten interested non-bidding vendors……page 6
3. Interview Summaries……page 7
4. RFP Statement of Work (minimum requirements of service)……page 9
5. Select Ride Budget Proposal……page 36

Exhibit 1: Service Area Map

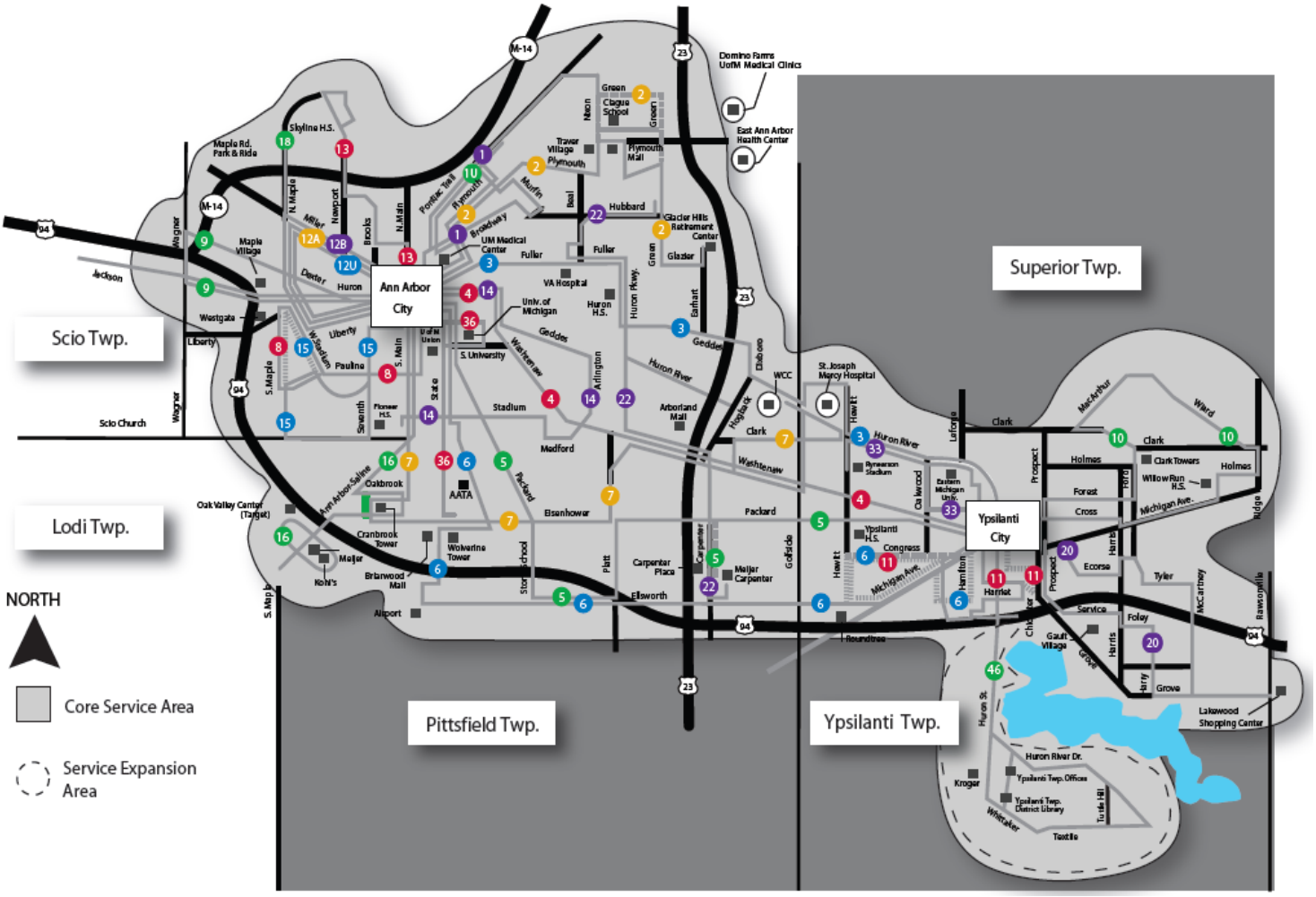


Exhibit 2: Survey of the interested non-bidding vendors

The Team contacted the vendors that participated in the pre-conference meeting in response to their non-participation in the final steps. The comments received by vendors ranged from the capital investment concern to current market competitiveness.

- Our decision not to submit a proposal was based on concerns regarding the capital investments required to provide vehicles for the operation with a contract base term of only 36 months. Our internal rate of return requirements on such capital investments would have resulted in a proposed rate that would not have been as competitive as the AAATA would have desired from the preferred contractor.

- Unfortunately, it was late in the timeline when we came across the RFP. Even though the Authority was very cooperative and extended the deadline by two weeks, we just did not end up having the resources to turn around a high-quality, personalized response by August 4th, so we decided not to bid the project. This was a well-written RFP

- Our operations and business development team conducted a thorough review of the RFP and addenda, with much analysis of the demand for service, the supply/resources, facility possibilities, vehicles required, and capital/operating expenses. We also identified an excellent General Manager candidate. However, after this extensive review and due diligence, our team determined we could not make a mutually acceptable, competitive price proposal to Ann Arbor Transportation Authority compared to the current operating environment.

Exhibit 3: Interview Summaries

RFP/Evaluation Process: AAATA Paratransit Procurement
Perspective of RLS & Associates, Inc. (consultant to AAATA)
9/26/14

AAATA, with assistance from RLS & Associates, Inc., developed a comprehensive and thorough Request for Proposals (RFP), to procure paratransit supplemental services for the Board. The RFP was consistent with Federal, State and local requirements for the procurement of paratransit supplemental services.

AAATA issued the RFP on June 9, 2014, and advertised in national transit media, as well as local and regional media.

AAATA conducted a non-mandatory pre-proposal meeting on June 23, 2014, to allow for questions and discussions about the RFP. In addition, potential proposers were allowed to submit written questions up to June 27, 2014.

AAATA issued several amendments to the RFP, as a result of questions and comments raised during the pre-proposal conference and as a result of written questions. All amendments were shared with all potential proposers that expressed an interest in the project.

Proposals were due on August 4, 2014. AAATA received two proposals, one from Select Ride and one from Blue Cab.

The RFP listed six criteria with which AAATA was to evaluate all proposals:

- Method of approach to the scope of work
- Capability and qualifications of the prime contractor and all subcontractors
- Capability and qualifications of the key individuals
- Understanding of the problem and objectives
- Demonstrated ability to complete the project on time and on budget
- Price

The criteria were not weighted. A maximum budget was provided for each of the potential 5 contract years.

AAATA formed an ad-hoc proposal evaluation team, consisting of two LAC Executive Board members, key AAATA staff and RLS & Associates, Inc., to review the proposals, ask questions of the proposers, and apply the evaluation criteria.

The evaluation team first reviewed the written proposals, with each member developing a preliminary scoring and questions.

The team met separately with Select Ride and Blue Cab, asked questions, and allowed the proposers to give a short presentation about themselves and their proposals.

The team determined that Select Ride had the higher score. More questions were developed for Select Ride. Select Ride provided written answers to the questions and then met with the team met a second time.

After that second meeting, the team concluded that Select Ride had sufficiently answered all questions, was compliant with the requirements of the RFP, was within budget, was the higher scoring proposer, and would provide AAATA with the services that it desired. The team recommended that Select Ride be awarded the contract.

RLS & Associates, Inc. believes that the proper process was followed in the procurement of the paratransit supplemental services, and that AAATA is correct in awarding the contract to Select Ride.

Sincerely,

Richard A. Schultze, P.E.
Senior Associate

Exhibit 4: RFP STATEMENT OF WORK

SECTION II: STATEMENT OF WORK

II-A Background

The Ann Arbor Area Transportation Authority (AAATA) was chartered by the City of Ann Arbor in 1968 under Act 55 of 1963 of the State of Michigan. The AAATA is a transportation authority, legally authorized to provide transit service throughout Washtenaw County. In 1973, the voters of Ann Arbor approved an amendment to the City Charter to provide a property tax to support transit services. In 2014 the voters of Ann Arbor City, Ypsilanti City & Ypsilanti Township approved an amendment to provide property tax support for expanded transit services within these areas.

The AAATA is governed by a ten-member Board of Directors appointed by the member jurisdictions. The Board of Directors oversees the deployment of transit services within the urbanized areas of Washtenaw County. The AAATA also enters into Purchase of Service Agreements to provide service within the townships of Pittsfield and Superior. The population of the entire service area is 236,852.

Currently, the Ann AAATA operates twenty-seven fixed routes of transit service within the urban area. General Service hours are from 6:00 a.m. to 10:45 p.m. weekdays and 8:15 a.m. to 6:15 p.m. on Saturdays and Sundays. See item II-D-1 Hours of Operation for anticipated service hour changes. The AAATA recently approved a Five Year Implementation Plan that will increase the hours of operations from 6:00 a.m. to 12:30 a.m. weekdays and 7:30 a.m. to 11:30 p.m. on Saturdays and 7:30 a.m. to 8:00 p.m. on Sundays. The AAATA will also increase the number of routes from 27 to 33, giving more connections throughout the greater Ann Arbor and Ypsilanti areas.

AAATA currently provides demand response service to areas within 0.75 miles of an active AAATA bus route including the Cities of Ann Arbor and Ypsilanti, and the Townships of Ypsilanti, Superior and Pittsfield. AAATA's total demand-response passenger trips was approximately 132,503 in 2011, 134,256 in 2012 and 133,235 in 2013. Based on 2013 averages, the average accessible and non-accessible trip length is approximately 3.7 miles. The average weekday passenger trips for accessible service is 107 and for non-accessible service is 362. The average Saturday passenger trips for accessible service is 61 and non-accessible is 119. The average Sunday passenger trips for accessible service is 54 and non-accessible is 81.

AAATA provides contractor operated service to as many eligible customers as possible. AAATA currently provides 6 lift-equipped the vehicles used for delivery of accessible trip demands. AAATA, directly operated and contracted operations, provides over three hundred rides per day with a potential of offering up to 190 additional trips per day by 2018.

II-B Objectives of the Project

The specific objective for this Project is to secure the services of a Contractor to deliver ADA and other Demand Response Transportation Services (Non-ADA) which will provide:

- Prompt courteous service to our customers who are ADA and senior Good As Gold certified.
- Hire and maintain an active work force large enough to cover all runs.
- Dispatch all activities related to trips booked by AAATA.
- Create, schedule and dispatch same-day runs efficiently.
- Hire and maintain an active maintenance workforce.
- Maintain and perform routine services on all vehicles used for contracted AAATA service.
- Maintain accurate fare counts, passenger counts, and all other required reporting.

- Comply with all applicable federal, state, and local requirements.

II-C Quality Control and Quality Assurance

The Contractor will be responsible for monitoring service quality standards on a frequent and regular basis and as requested by AAATA. Proposals should include a written plan for monitoring the following performance and service quality standards: On-Time, Shared Rides, Missed-Trips, Ride-Times, Call On-Hold Times, and Complaints. In addition, the Contractor must submit original manifests to AAATA immediately upon request. Completed manifests will be used to monitor on-time performance.

II-D Scope of Work

AAATA's ADA Complementary Paratransit Service (A-Ride) is a shared-ride service for persons with disabilities who are unable to use fixed route due to the effects of their disability. AAATA's Good As Gold Service is a shared ride service for seniors age 65 or better. A-Ride and Good As Gold service is highly specialized and is provided to individuals who have been certified as eligible pursuant to the Americans with Disabilities Act Regulations and for seniors age 65 or better.

AAATA is developing a shared-ride service named Dial-A-Ride Plus. At this point the details of service delivery have not been developed. During the course of this contract AAATA may choose to negotiate operations with the contractor as an addendum to this contract. Dial-A-Ride Plus service would be operated as a shared-ride feeder service organizing limited tour routes serving a mix of people with disabilities and general public riders. The limited routes would connect centralized coordinated pick-up locations to the closest fixed route intercept location. The operation of this service is intended to take advantage of maximizing the movement of public riders in areas not served by fixed route but could be served by a smaller limited flexible route system. The geographic area of this service would be within the collective boundary of the Township of Pittsfield, and the Township of Ypsilanti. This service will be as space is available operated weekdays between 6AM to 8PM and Saturday between 8AM to 6:30PM.

In all aspects, services must maintain full compliance with the Americans with Disabilities Act (ADA). The Contractor shall carry out its responsibilities under this contract and work cooperatively with AAATA to ensure full compliance with the ADA. In addition to the ADA, the Contractor shall be in compliance with all applicable federal, state and local regulations and requirements. The Contractors employees and drivers engaged in the delivery or administration of service must have a working knowledge of the service guidelines described within the A-Ride User's Guide and Good As Gold User's Guide. These manuals can be obtained at AAATA's website www.theride.org.

II-D-1 Hours of Operation

Services to be provided under the terms of this contract as follows: Weekdays from 6:30 a.m. to 10:45 p.m., Weekends from 8:00 a.m. to 6:30 p.m. It is possible the hours could be extended with the implementation of the AAATA' s Five Year Transit Improvement Program (Exhibit 6) In accordance with ADA Regulations, hours of A-Ride service mirror the hours of service of AAATA's fixed routes and are subject to change if hours of fixed route operation change. A-Ride service is not provided on New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving, Easter, and Christmas. Service ends at 6:45p.m. Christmas Eve and New Year's Eve.

1. Current Service August 2014 – The hours of operation for:
    a. Weekday's from 6:30 a.m. to 12:30 a.m.
    b. Saturday from 8:00 a.m. to 6:30 p.m.
    c. Sunday from 8:00 a.m. to 6:30 p.m.
2. Expected Service August 2015 – The hours of operation for:
    a. Weekday's from 6:30 a.m. to 12:30 a.m.
    b. Saturday from 7:30 a.m. to 11:30 p.m.
    c. Sunday from 7:30 a.m. to 8:00 p.m.

II-D-2 Service Area

AAATA reserves the right to add or delete service areas during the term of the contract in the form of a change order. Currently the general service area is defined as any location within three-quarter miles of an existing AAATA fixed route bus, including the Townships of Ypsilanti, Pittsfield and Superior. See **exhibit 9** for current A-Ride and Good As Gold service area maps.

II-D-3 Eligible Customers

For the purposes of counting ridership, eligible customers are categorized by the following types:

- A-Ride – A passenger with a disability certified as ADA eligible.
- Good As Gold – A passenger age 65 or better certified as Good As Gold eligible.
- Companion – A person accompanying the eligible A-Ride or Good As Gold passenger.
- Dial-A-Ride Plus general rider – Any rider other than an A-Ride, Good As Gold, companion or PCA.
- Personal care assistant (PCA) – A person that travels with and assists the eligible A-Ride passenger.
- Service animal – A domesticated animal that travels with and assists the eligible A-Ride passenger.
- AAATA employees who ride for the purpose of service evaluation or eligibility.

PCA's and companions must have the same origin and destination as the eligible passenger. A-Ride eligible riders may travel with one PCA and one companion. Good As Gold eligible riders may travel with one companion. ADA regulations permit A-Ride eligible riders to travel with additional companions only if space is available.

II-D-4 Fare Handling

The Contractor will be responsible for collecting and reporting all fares in accordance with rates established by AAATA. Fares are paid in cash or by advance purchase of ride script tickets. All fares shall be AAATA's revenue. AAATA will consider the fare as being paid in cash and will deduct it from the monthly bill. AAATA will reimburse for collected and returned script along with the monthly invoice. The fare amount for each passenger type will be determined by AAATA and will appear on the manifest. If a fare is not paid the trip should not be provided without notification to AAATA and authorization by AAATA to provide the trip. If a fare is noted as free on the manifest then the trip shall be provided as authorized by AAATA.

Current fares are:

- AAATA Employee .00
- Advance Reservations $3.00
- Same-Day trip requests $4.00
- Personal Care Assistant .00
- Children age 5 and younger .00
- Adult Companion/Guest $3.00
- Youth Companion/Guest $1.50

The Contractor will need to develop a secure fare collection system that provides accountability of collection of fares. The Contractor will need to have a secure location for storage of collected fares. Fare collection information including method of payment must be documented on the monthly invoice provided to AAATA. AAATA reserves the right to audit fare collection procedures at any time. At the discretion of AAATA, cash fares may be retained by the Contractor and deducted from the monthly bill.

If a PCA is riding, the eligible passenger's identification card must indicate that they are authorized to have a PCA. A maximum of two additional people can travel with the eligible A-Ride card holder, specifically two companions or one

companion and one PCA. A maximum of two additional people can travel with the eligible Good As Gold card holder, specifically one or two companions. ADA regulations permit A-Ride eligible riders to travel with additional companions only if space is available.

II-D-5 Reservations, Scheduling, Dispatching & Trips

At the end of each day, by 6:00 pm, the Contractor will receive all advanced scheduled trip orders taken by AAATA within the Trapeze PASS program. It will be the Contractor's responsibility to efficiently dispatch these trips using the Trapeze PASS program provided by AAATA. AAATA will provide training on using the Trapeze PASS program.

A. RESERVATIONS & SCHEDULING: AAATA will receive all advance reservations. An Advance reservation is one which is received by 5:00 p.m. on the day before the requested trip date. AAATA will provide the contractor the trip manifests for next day trips the evening prior.
B. SAME-DAY TRIPS: The contractor will receive all same-day trip requests. A same-day trip request is one that is received on the day of the requested trip. The contractor will maintain a separate telephone line to receive requests for this service. Same-day trips are provided in accessible (when space is available) and non-accessible vehicles.
    1. The contractor will accept same-day orders (only for trips with an origin and a destination within the City limits of Ann Arbor) and for will-call return requests.
    2. The Contractor will use Trapeze PASS scheduling software supplied by AAATA to reserve, schedule, and dispatch all same day trips defined as part of this contract.
    3. The Contractor will receive same-day (and will-call return) requests for trips from customers. Trip requests must be accepted via telephone. Trip requests may be accepted via facsimile or email. The Contractor shall take care to ensure that customers who make trip requests by means other than telephone are treated equitably in terms of scheduling the trip in a timely fashion.
    4. The contractors call center shall be open every day of the year, except for the holidays listed in Section II-D-1, from 6:15 a.m. to 10 p.m. weekdays, and 7:15 a.m. to 5 p.m. weekends.
    5. Riders are limited to two (2) round trip same-day trips per day. There may be no group trips of four (4) or more riders. The contractor is responsible for developing a system to comply with these trip limitations. Trips provided in excess of these limitations may be determined ineligible for reimbursement.
    6. The pickup window for same-day and will-call trips is 20 minutes from the scheduled pick up time.
    7. Riders using wheelchairs who cannot transfer may be accommodated on same-day trips in accessible vehicles if space is available. Riders who use folding wheelchairs, and can transfer, shall be accommodated.
    8. The Contractor shall approve same-day trip requests based on conditional eligibility rules. For example, a rider may be determined eligible for A-Ride service for trips to and from work only, any other trip request must be denied. Riders are informed in writing of their eligibility conditions during the approval process by AAATA. The AAATA will provide, and update the Contractor with rider eligibility conditions within Trapeze Pass. The Contractor is expected to adhere to the rider's individual trip conditions. Trips provided in excess of this condition will be ineligible for reimbursement.
C. DISPATCHERS: Contractor dispatchers must be knowledgeable in all aspects of service operations, including computerized dispatching procedures, equipment, and use of telephone devices for the deaf (TDD). Dispatchers must be adequately trained in customer service and must proficiently and effectively dispatch trip requests in order for drivers to adhere to AAATA's on-time performance standards.
D. TELEPHONE LINES: The contractor must assign personnel to cover the telephone lines during all hours of service operation sufficient to receive same-day trip requests, and will-call requests.
E. SHARED RIDES: The Contractor is required to consolidate unrelated passenger trips into one vehicle (shared rides) whenever origins, destinations, and scheduled pick-up times are such that reasonable service quality can be maintained. A trip is defined as one or more people with the same origin and destination. If two people have different origins, but the same destination, it is considered two trips.

II-D- 6 No-Shows & Cancellations

Drivers are required to wait five (5) minutes for the customer to board the vehicle before declaring them a no show. Any subsequent advance reserved A-Ride ADA required trips scheduled for the same day following a valid no show may not be cancelled unless the passenger calls to cancel the trip. Passengers have up to thirty (30) minutes before their next trip's scheduled arrival time to cancel any remaining trips, otherwise the passenger will be considered a no-show if they fail to appear for these trips as well. Any subsequent same-day or non-ADA trips following a valid no-show will be automatically cancelled. If the vehicle arrives past the scheduled pickup window time supplied to the customer, and the customer is no longer waiting, it is considered a missed trip by the Contractor, not a customer no show.

A. A valid no-show is defined as:

1. A customer failing to board the vehicle within 5 minutes of its arrival within the scheduled pickup window

2. The cancellation of a trip within thirty minutes or less of the scheduled arrival time.

3. The contractor is required to update the rider's trip as a no-show within Trapeze Pass.

B. CANCELLATIONS: A cancellation is defined as:

1. A customer calling to cancel their trip at least 30 minutes or more prior to its scheduled arrival time.

2. The Contractor is required to take cancellations for trips occurring on the same day of the scheduled trip between operating hours as defined in Section II-D-1.

3. The contractor is required to update the rider's trip as cancelled within Trapeze Pass.

II-D- 7 Complaints

Complaints received by AAATA will be sent to the Contractor electronically. The Contractor shall have primary responsibility for investigating and resolving all complaints and providing AAATA with the details of action taken to resolve or prevent recurrence of the problem within three days of receiving the complaint. The Contractor will be required to submit the complaint response within AAATA's Customer Relations Management (CRM) system electronically.

Complaints received by the Contractor shall be investigated and the complaint and the Contractor's response shall be provided in writing to AAATA. The Contractor shall also provide a response to the customer. A written response shall be provided if requested by the customer. The Contractor shall provide 90% of the responses to complaints, to both AAATA and the customer, in three (3) working days and the balance within 5 working days. If a complaint cannot be answered in the three day window, the Contractor must notify both AAATA and the customer that an additional 3 working days is needed to properly respond.

Approved AAATA personnel or personnel hired by AAATA shall be allowed to ride in a vehicle at any time during its operation in order to monitor service. AAATA personnel or their designees shall be allowed to inspect the vehicles and

property of the Contractor at any time during business hours. AAATA may investigate by covert operation, as AAATA deems appropriate.

Any operator performance or service discrepancies noted by AAATA personnel that are reported to the Contractor must be brought to the operator's attention. The Contractor will be required to provide a confidential written report to AAATA's Project Manager describing the resolution or action taken by the Contractor to correct the problem and prevent recurrence. Vehicle, operational, policy or service standards violations shall be dealt with pursuant to the above procedure.

If AAATA determines that any Contractor personnel is involved in illegal activity or contributes to an unsafe condition while operating the service, the Contractor must comply with AAATA's request that the Contractor employee be prohibited from participating in delivery of any AAATA service.
If a complaint involves a specific employee of the Contractor, the name and other identifying information of the complainant shall remain confidential.

II-D-8 Collision and Passenger Accident Procedures

All collisions involving any vehicle used for any type of AAATA Service must be reported immediately to AAATA. A supervisory level Contractor employee must respond to all such collisions for the purpose of determining the cause of the accident. If it is determined by the Contractor Supervisor that the driver of Contracted Service contributed to the cause of the accident, the Contractor must comply with all requirements of FTA regulations regarding drug and alcohol testing. The Contractor must provide AAATA written documentation of the driver, supervisor and police reports including drug and alcohol testing results as soon as possible after the collision.

Written documentation of all accidents and injuries involving passengers that are not a result of a vehicle collision must also be provided to AAATA within three (3) days of occurrence. Documentation should include a description of how the injury occurred, how Contractor employees responded to the injury, an outline of follow-up conversations with the customer, date the injury was reported to the Contractor's insurance company, and recommendations for prevention of future injuries of the same type if possible.

II-D-9 Emergency Operations Plan

The Contractor shall design and implement an Emergency Operations Plan, acceptable to AAATA, designed to continue (as much as possible) uninterrupted service to AAATA customers. The outline of the emergency operations plan must be submitted to AAATA at the contract award, and the final plan shall be submitted to AAATA no later than contract start up. The plan shall include at a minimum:

- Power Failures
- Telephone and Communication Equipment Failures
- Adverse weather conditions
- Labor Shortages
- Labor Strikes
- Flooding
- Other potential service interruptions/disruptions

II-D-10 Appearance and Courtesy

All Drivers performing service under this contract who are in contact with the public shall be neatly groomed and dressed. Contractor purchased uniforms as approved by AAATA shall be worn by drivers. The Contractor and its employees shall, in the performance of duties as outlined in this RFP, conduct themselves with the highest degree of professionalism and courtesy.

Hats that have been approved by AAATA may be worn during winter when the driver is out of the vehicle assisting a passenger.
AAATA desires a professional image to enhance the A-Ride and Good as Gold service. The Contractor shall enforce a dress code for drivers performing A-Ride service to consist of, at a minimum:

- Long sleeved or plain solid colored Polo shirt (white, beige or blue).
- Solid-dark color pants or tailored knee length shorts (blue, black or khaki).
- Appropriate footwear (closed heel and toe, low heel, slip resistant sole)
- A professional-quality name badge with driver's first name.

All drivers must adhere to the following:

- No extreme tattoos or body piercings.
- No jewelry or accessories that could interfere with the safe performance of their duties.
- Drivers must practice good hygiene and be well groomed with no extreme hair styles.
- Drivers may not apply or emit extreme aromas of cologne or perfume.
- Smoking or use of tobacco products is prohibited within any vehicle used to deliver service under this contract.
- Drivers not meeting these appearance standards shall be pulled from providing service until they are compliant.

II-D-11 Driver Suitability

A. The Contractor is required to perform a check of a driver's criminal conviction records from a commercially available record search service for drivers operating vehicles under the contract prior to hire. Failure to disclose any criminal conviction to AATA will disqualify the driver and may result in termination of contract. The Contractor must report to AATA any drivers operating under the contract who are arrested for public offenses during the course of their employment, including being arrested for traffic related offenses. A driver will be disqualified from operating a vehicle under the contract for criminal misconduct if they have been convicted of any offense listed below. This list is a representation, and is not all-inclusive.

    1. Operating a motor vehicle while under the influence of alcohol, a narcotic drug, or derivatives of narcotic drugs.
    2. A crime involving the transportation, possession, sale or possession for sale, or unlawful use of a narcotic drug, or derivatives of narcotic drugs.
    3. A felony or misdemeanor involving moral turpitude.
    4. A felony or misdemeanor involving violence.
    5. Leaving the scene of a traffic accident, which resulted in personal injury or death.
    6. A felony involving the use of a motor vehicle.

B. A driver is disqualified from operating a vehicle under the contract for conduct listed below. This list is a representation, and is not all inclusive.
    1. Any person determined to be a mentally disordered sex offender under Michigan law or under similar provision of law of any state.

2. Any person required to register as a sex offender under Michigan law or under similar provisions of law of any other state.

C. Drivers must have the following minimum criteria to participate in the contract.
   1. Drivers with a suspended or revoked license may not provide service under the contract.
   2. Drivers must not have more than eight (8) points on their driving record.

II-D-12 Driver Assistance for Wheelchairs & Mobility Aids

The following are guidelines for providing driver assistance for wheelchair users: At all times, drivers must be knowledgeable and proficient with the skills required to board and secure passengers using wheelchairs safely.

A. If requested or instructed, drivers will push manual wheelchairs to and from the vehicle and building entrance. Drivers may assist riders up or down one step but may not push wheelchairs through deep snow or very icy conditions.

B. Wheelchairs must be secured in the designated securement locations. Riders refusing to allow the driver to secure their wheelchair must be denied service. If requested or instructed, drivers shall secure riders with wheelchairs equipped with seatbelts or brakes.

C. Drivers may allow the rider's PCA or companion to secure the wheelchair. However, the driver must inspect and declare that the wheelchair is properly secured prior to departing.

D. Drivers will utilize the vehicles lap belt and shoulder harness equipment to secure the rider, unless the rider refuses the use of this equipment.

E. Oxygen tanks must be secured to a wheelchair, an oxygen tank cart, or oxygen tank shoulder bag.

F. Walkers, canes, personal items etc. may not be secured or stowed in designated wheelchair locations.

II-D-13 Passenger Assistance

Contractor's drivers are required to provide assistance upon passenger request. The following guidelines describe the assistance that can be provided:

A. Drivers may help riders get into and out of the vehicle by providing standby assistance such as extending an arm to help a rider with balance issues or for guiding a visually impaired rider. However, while doing so, drivers may not physically lift or carry a rider or provide such physical assistance that should be safely provided by a PCA or safety equipment.

B. When requested, instructed, or if good judgment requires it, drivers shall accompany the rider between the building entrance and the vehicle.

C. When requested or instructed, drivers shall assist riders no further than the front entrance doors or foyer of a public building. Drivers may not lose sight of their vehicle while providing this assistance.

D. Drivers shall provide assistance, upon request, by carrying packages that can reasonably be carried from the vehicle to the door in one trip.

II-D-14 Service Provisions

A. Contractor shall be responsible for anticipating required driver staffing levels and ensuring that sufficiently trained and qualified drivers are available to operate scheduled services. This includes the establishment of procedures to cover unanticipated driver absences, late check-ins and illnesses to minimize late pick-ups, missed trips and reassignment of trips.

B. Whenever possible, AAATA will give the Contractor at least ninety (90) days to respond to major changes requiring more drivers or major adjustments to work shifts. As little as 24 hours notice may be given to respond to minor adjustments.

C. AAATA will give major changes to the Contractor in writing. Minor adjustments, depending on the timeframe allowed, may be given verbally and then confirmed in writing.

II-D-15 Driver Training

The Contractor shall be responsible for all costs relating to employment, training, and compensation of personnel for this contract. All drivers shall have an understanding of working with senior citizens and persons with disabilities, an excellent driving record, a familiarity with the service area, and an understanding of other transportation services provided by AAATA.

A. Minimally, drivers and mechanics must possess a Michigan Commercial Driver License (CDL) with the class type and endorsements that are appropriate for the type of vehicle driven.
B. Operator awareness and sensitivity to customer needs is critical to service. Operators shall treat all passengers in a professional and courteous manner and assist customers to ensure safe and comfortable transportation.
C. When requested (or instructed) drivers are required to assist customers to and from the vehicle to the door of the destination (if doing so does not cause the driver to lose sight of their vehicle or pose a safety risk), including loading and unloading packages, opening and closing vehicle doors, securing seatbelts, and securing wheelchairs and other mobility devices inside the vehicle when assistance is needed or requested.
D. Operators must make a reasonable effort to notify customers of their arrival such as knocking on doors, ringing doorbells, making a verbal announcement, honking the horn, and entering the front foyer of public locations (if doing so does not cause the driver to lose sight of their vehicle or pose a safety risk).
E. Operators must drive safely and follow the most efficient routing possible in consideration of distance, time parameters, and road conditions.
F. Operators must be trained to give accurate information regarding AAATA service and other AAATA services.

Training requirements shall include formal classroom and behind the wheel training.
Before operating any service outlined in this RFP, drivers must receive training on the following:

- AAATA approved Passenger Assistance & Disability Awareness Training
- Radio Procedure Training
- Wheelchair Securement Training
- Vehicle Lift/Equipment Training
- Geographical Training & Knowledge of entire Service Area
- Behind-the-Wheel Training
- Defensive Driving Training

Within 30 days of operating any vehicles on this contract must have training to include the following:

- Blood borne Pathogen/Universal Precautions Training
- First Aid and CPR Training
- Appropriate Substance Abuse Training for all employees
- General services provided by AAATA services including an overview of fixed routes, fares, transferring between AAATA services, and where to refer customers for more detailed information

The Contractor shall also provide all drivers with "refresher training" on an as needed and annual basis.
The Contractor must provide AAATA with a list of source documents and materials used for training, a copy of a Training Agenda for each training session, and a list of dates that each driver received training on all topics listed above as soon as training has been completed.

Please describe in the proposal how training requirements will be met by the date of implementation of service and continue throughout the duration of the contract.

The Center for Independent Living and Project Action are local resources for training and certification programs.

II-D-16 Operator Manifests

AAATA is in process of procuring a computer aided dispatch and automated vehicle locator (CAD/AVL) system for tracking its accessible vehicles. Until the CAD/AVL equipment is installed and its use is implemented, the Contractor will be responsible for printing and distributing daily driver manifests using the computer program provided by AAATA. AAATA currently uses the Trapeze PASS program. AAATA will provide training on using Trapeze PASS. The Contractor will access AAATA's Trapeze PASS system remotely via VPN. Specifications for accessing will be provided by AAATA.

II-D-17 Eligible Billing Costs

The only expense that the Contractor may bill to AAATA is trips for customers who have been certified as eligible for ADA Complementary Paratransit service, Good As Gold service or Dial A-Ride Plus. The contractor will not bill for personal care assistants, companions, missed trips, invalid no-shows or service animals. AAATA will not reimburse the Contractor for any trips that the Contractor performs that are determined to be ineligible trips.

II-D-18 Invoices & Taxes

A. The Contractor shall submit an invoice once per month to AAATA, no later than 1 p.m. on the seventh working day of each month. Invoices submitted later than 1 p.m. shall not be considered submitted until the start of the following working day.

B. AAATA will make payment to the Contractor within thirty (30) days from date of receipt of a properly documented, submitted, and correct invoice from the Contractor.

C. The Contractor will use the price proposal sheet as a monthly invoice itemizing services rendered from the preceding month and submit to AAATA for prompt payment.

D. Upon acceptance of proper accounting for funds, and in conjunction with monthly statements, the Contractor may keep those cash fares collected and credit AAATA with that same amount on each invoice.

E. The Contractors invoices must include AAATA's purchase order number, be billed and payable in U.S. dollars, and be sent to AAATA's Project Manager.

F. AAATA is exempt from payment of all Federal and State of Michigan taxes in connection with the contract. AAATA will furnish a Certificate of Exemption and its Federal Employer Identification Number, upon request, to the Contractor.

II-D-19 Performance Standards

The below Performance Standards are subject to review after the three month evaluation period described in Performance Penalties. The Performance Standards will be adjusted, if needed, based on actual data collected during the first three months of the services performed.

A. ON-TIME PERFORMANCE

1. A-Ride operators shall pick up customers no later than 20 minutes after the scheduled pick-up time for advanced reservations and no more than 20 minutes after the scheduled pick-up time for same-day and will-call trips to be considered on time.

2. If arriving early the operator must wait until the scheduled pick-up time, and an additional 5 minutes for the rider to board before recording the customer as a no-show.

3. A customer may not be listed as no-show prior to the scheduled pick up time unless the customer refuses the trip after the vehicle operator has arrived at the pick-up location.

4. Performance of this contract shall require the Contractor to meet a daily 97 percent (97%) on-time performance (separately for both Accessible and non-accessible services).

5. The only factor more important than on-time performance shall be safety. Due to extreme weather conditions there may be days when strict on-time performance requirements may be waived in order to optimize safe operation. These days will be determined by AAATA.

6. The Contractor is required to notify the Customer, then AAATA, immediately when any operator will be more than 15 minutes late.

7. When a same day-trip is dispatched to the Driver, the Contractor will adhere to all of the on-time performance standards.

AAATA will not tolerate a lack of service due to a lack of vehicle operators. The Contractor agrees that safe and timely performance of this service is required and repeated violations of this section will result in AAATA issuing a notice of remedy. Failure to remedy in accordance with this paragraph may result in breach of contract, at the sole determination of AAATA.

B. MISSED TRIPS: Contractors shall complete <u>all</u> trips scheduled except for cancellations and no-shows. A trip is considered missed if the Contractor does any of the following, unless AAATA scheduling is the reason for the missed trips.

1. Fails to have a vehicle arrive at the pick-up location specified in the reservation.

2. Fails to carry out specific instructions included with the reservation which results in the rider missing their ride (e.g. a specific building entrance, door-to-door, honk on arrival, etc.)

3. Fails to arrive at the pick-up location within the pick-up window supplied to the customer when they make a reservation (same-day, advance or will-call) and the customer is no longer waiting.

C. RIDE TIME: Passengers should not be required to take long and/or circuitous journeys to reach their destination. The rider should arrive within forty-five (45) minutes of being picked up for ninety-five percent (95%) of the trips in which the rider's origin is within five (5) miles of the destination. For trips with an origin and destination more than five (5) miles apart, the ride time should not exceed one hour for ninety-five percent (95%) of the trips.

D. CALL PERFORMANCE: ADA regulations require that there be no operational patterns or practices which significantly limit the availability of ADA Paratransit services, including the inability of clients to contact reservation services.

E. SHARED RIDES: The provider shall maintain a shared-ride threshold of 50% or higher for same day trips per monthly billing period.

II-D-20 Performance Penalties

Monthly performance penalties, for all categories will not be assessed until the fourth month of the contract, August 2015. The performance measures for the first three months will be evaluated by AAATA and changes in the performance measures may be adjusted after the three-month period.

If services are not delivered in accordance with the contract, then AAATA will impose the following performance penalties which shall be deducted from the monthly invoice payment.

A. LATE TRIPS: A penalty fee equal to the Contractor's charge per rider trip shall be levied for each customer who is picked up more than fifteen minutes later than the on-time window when the lateness is a result of Contractor performance.

   Assessed damages (separately for both Accessible and non-accessible services) for any month the provider fails to meet the 97% on-time performance standards:

   95% - 96.99% = $100
   90% - 94.99% = $200
   89.99% (or lower) = $300

B. MISSED TRIPS: If any scheduled advanced reserved trip is missed then a penalty fee equal to $50.00 per trip shall be levied for each missed trip as a result of Contractor performance.

C. CALL PERFORMANCE: Same-day reservation calls must be answered within 20 seconds and on hold less than 3 minutes 95% of the time and 99% will be on hold less than five (5) minutes. For any day during the billing month that the time on hold for customers exceed either or both of these standards a $25.00 fee will be levied.

D. RIDE TIME: The rider should arrive at their destination within forty-five (45) minutes of being picked up for ninety-five percent (95%) of the trips in which the rider's origin is within five (5) miles of the destination. For trips with an origin and destination more than five (5) miles apart, the ride time should not exceed one hour for ninety-five percent (95%) of the trips. For any day during the billing month that the ride time for customers in either lift-van service or sedan service exceeds either or both these standards a $25.00 fee per rider trip will be levied.

E. REPORTING: Inaccurate reporting of hours, mileage, and passenger counts will result in reports being returned to the Contractor for correction. If repeated reporting problems are found, a penalty of $100.00 per day per manifest or run may be imposed.

F. COMPLAINTS: If AAATA documents valid complaints that exceed ½ of 1% of the total number of trips provided on any day (not including complaints for lateness) the Contractor shall pay a penalty of two times the cost of the rides that exceed ½ of 1% per valid complaint. AAATA will levy a penalty fee of $1,200.00 if the number of valid complaints for that month. A valid complaint is any complaint that does not involve late rides.

G. SHARED RIDES: The provider shall maintain a shared-ride threshold of 50% or higher for same day trips per monthly billing period. Assessed damages for any month the provider fails to meet the 50% Shared-Ride threshold:
40% - 49.99% = $100
35% - 39.99% = $200
34.99% (or lower) = $300

II-D-21 Reports & Data

The Contractor shall be required to collect various data**.** Vehicle operators shall accurately and completely document actual pick up and drop off times, mileages, and fares collected. The Contractor will be responsible for compiling and submitting ridership and trip information data required by AAATA in a format determined by AAATA. Currently information is compiled in Microsoft Excel format file that is sent electronically to AAATA. The Contractor will be responsible for all costs associated with development and installation of all computer programs and equipment required for data compilation, modification of the program to meet the Contractor's need for information, and training on use of the program.

The method of data collection and the format of reports are subject to change at the discretion of AAATA. In the future, AAATA may require that data be entered by the operator into an electronic device provided on the vehicle by AAATA with the information being transferred to AAATA electronically. The Contractor will be responsible for all costs associated with training on using new electronic equipment and maintenance of the equipment. The Contractor will be responsible for storage of documents.

The Contractor must also submit pre-employment, monthly, post-accident, and random drug and alcohol testing reports in a format as determined by AAATA.

Other data requested by AAATA or required by FTA or MDOT shall be submitted upon request in any media or format as determined by AAATA. AAATA reserves the right to suspend payment, complete or partial, for failure of the Contractor to provide required documentation and reports by their due date.

All monthly reports must be submitted with the invoice for the previous month's services, and no later than the seventh working day of each month. Reports that are to be provided in an electronic format must be in a format acceptable to AAATA. All reports shall be delivered to the Project Manager. The reporting requirements for the first three months may be evaluated by AAATA; adjustments may be made after the three-month period.

A. For each day of the month, a record of each trip provided, including: (Electronic Format Required)
   1. AAATA ID Card number
   2. Date of trip
   3. Pickup location
   4. Drop off location
   5. Vehicle number
   6. Run Number
   7. Driver
   8. Advanced reservation, same-day or will-call, if applicable
   9. Trip request time for same-day trips, if applicable
   10. Scheduled pickup time for advanced reservations, if applicable
   11. Time vehicle was dispatched
   12. Actual Arrival time
   13. Actual pickup time
   14. Actual drop off time
   15. Fare payment (cash or scrip)
   16. Metered fare if applicable
   17. Personal Care Attendant (Yes/No)
   18. Number of children five or under and number of companion fares collected
   19. Trip mileage (start-end of odometer readings).

B. For each day of the month, a record of each trip not provided, including:
   1. Trip denials including, rider card number, pickup & drop off location, time of request, scheduled pick up time
   2. No-Shows, including all applicable information in item A: 1-12
   3. Missed trips, including all applicable information in item A: 1-12
   4. The number of refusals

C. Summary report of trips by day and total for the month, including: (Electronic Format Required)
   1. Number of passengers
   2. Number of trips
   3. Number of no shows
   4. Number of trip denials, by category (ADA & Non-ADA denials)
   5. Total miles, including dead-head
   6. Revenue miles
   7. Total trip cost
   8. Total meter cost if applicable

D. Scrip tickets collected for that billing month shall be returned to AAATA.

E. Vehicle inspection records, summaries only.

F. Telephone Report. The Contractor must submit a telephone report, which includes the following information, by day:
   1. Number of calls received
   2. Average wait time
   3. Percent of calls on hold less than 3 minutes

4. Percent of calls on hold more than five (5) minutes
5. Abandoned calls

G. Summary of Accidents and Incidents as required.

H. Performance Standards

1. On-Time Performance. Contractor will submit the on-time performance each month.
2. Missed Trips. Contractor shall report the number of missed trips every month.
3. Ride Time. Contractor shall report the percent of ride times that exceeded forty-five minutes. The ride time can be calculated from the actual pickup and drop off time already being recorded.
4. Vehicle Miles. The Contractor shall report vehicle miles.
5. Passengers by Fare Category. AAATA and the Contractor will develop a report to provide clear and accurate reporting of passengers and fares.

Other Reports

A. Trip Sheets or Manifests. Each driver shall maintain trip sheets containing the following information for each trip provided. Drivers shall request the customer to sign the trip sheet or manifest.

1. Date
2. Vehicle number assigned
3. Origin and destination of trip
4. Time of pick-up
5. Time of drop-off
6. AAATA ID card number
7. Number of riders
8. Metered Fare if applicable
9. Fare paid, cash amount or scrip

The trip sheets or manifests are to be kept by the Contractor for three (3) months after the month of service. Trip sheets or manifests shall be delivered to AAATA for inspection upon request. The trip sheet or manifest shall be jointly developed by the contractor and AAATA.

B. National Transit Database
The AAATA is required to submit annual operating reports to the Federal Transit Administration (FTA). The Contractor will be required to provide information to AAATA on vehicles, accidents, service provided and costs necessary to complete this report.

C. Annual U.S. DOT Drug & Alcohol Testing MIS Data Report
AAATA is required to submit an annual report to the FTA for each year's drug/alcohol testing activities. The Contractor shall provide information to AAATA in a timely manner and in the format required to enable AAATA to file such reports with the FTA. The report must be submitted to AAATA no later than February 15th of each year.

D. Customer Satisfaction Survey

AAATA will develop a customer satisfaction survey to be executed during each year of the contract. The results of the survey will be shared with the Contractor. AAATA and the Contractor shall work together in developing customer satisfaction performance standards aimed at improving the delivery of service.

E. Data
All data collected and used by the Contractor in the course of executing this contract remains the property of AAATA. At the conclusion of this contract, by either expiration or termination, the Contractor must return all data, to AAATA. The data is to be used solely for performing the Scope of Work of the contract and shall not be used by the Contractor for any other purposes.

II-D-22 Vehicle Requirements

A. Contracted A-Ride service is provided by a fleet of lift-equipped accessible vans and non-lift equipped vehicles that are provided by AAATA and the Contractor. AAATA will own a total of fifteen (15) lift accessible vehicles during the life of the contract for the operator to utilize for daily services.

B. The contractor shall be required to operate and maintain a sufficient number of non-lift equipped vehicles to accommodate ambulatory riders. All non-accessible vehicles shall be passenger vehicles (van, sedan, etc.) capable of providing service for at least three ambulatory riders. Each passenger seat shall be equipped with a lap or shoulder belt available for use by the passenger.

C. AAATA is responsible for licensing and registration of the leased vehicles. It is anticipated that the AAATA will replace some or all of these vehicles during the life of the contract. The Contractor will be responsible for maintaining all required insurance coverage, maintenance and all daily operating costs.

D. Prior to delivering vehicles to the Contractor, a detailed inspection will take place with representatives of AAATA and the Contractor who will agree upon the current wear and damage of vehicles to be leased. Except for normal wear and tear, vehicles will be returned to the AAATA in the same condition as they were received by the Contractor. At all times the Contractor must maintain the vehicles in a safe, clean and mechanically sound condition in accordance with vehicle manufacturer and AAATA requirements.

E. The Contractor shall perform daily safety inspections of all vehicles used in the service of this contract prior to beginning service and at the end of each driver shift. A vehicle failing the daily inspection including those with non-working wheelchair lifts/ramps, heating and air conditioning units will not be used in service and must be reported to the AAATA Project Manager. Drivers are required to cycle wheelchair lifts and ramps before entering service. All belts and wheelchair tie downs must be inspected. The Contractor is required to submit copies of the driver's daily condition cards as well as monthly preventive maintenance inspection and repair reports along with the monthly invoice.

F. The Contractor will be responsible for maintaining the appearance and cleanliness of **all** vehicles used in service under the contract. Vehicles must be removed from service due to damage that is beyond repair as a result of a collision, accident, or Act of God. The contractor must adhere to all terms of the attached Vehicle Lease Agreement. Refer to Exhibit 8 for a copy of the Vehicle Lease Agreement. For cleanliness, reasonable exceptions will be made for usage during rain or other inclement weather. AAATA reserves the right to request to have any vehicle removed from service until it is in a safe and clean condition.

1. Vehicle Exteriors: Washing as required to maintain a clean exterior appearance (no visible evidence of marked dirt buildup from a distance of 25 feet). All graffiti must be removed within 24 hours.

2. Vehicle Interiors: At a minimum, interiors shall be swept, trash emptied, and cleaned once daily; shall be fully mopped, windows cleaned and driver's area cleaned once weekly including but not limited to the driver's area, dashboard, windows, seats, wheelchair belts and ties, and other interior areas. The interior passenger compartment of each vehicle shall be free of insects or vermin as well as offensive or noxious odors. The Contractor is prohibited from using any cleaning or pest control products or application procedures that would be hazardous to the health and wellbeing of the passengers.

G. Vehicles shall be operated in accordance with applicable Federal, State of Michigan, and local laws. Due regard for the safety, comfort, and convenience of passengers, property, and for the safety of the general public must be taken at all times.

H. Equipment Failure

1. In the event that any vehicles used as part of this contract experiences an accident, equipment failure or service interruption of any kind, the Contractor will be responsible for providing alternative transportation at the Contractor's sole expense. Any customers on a disabled vehicle shall be transported to their destination within forty-five (45) minutes from breakdown. Trips not completed will be treated as missed trips, and be subject to liquidated damages.

2. The Contractor shall develop and utilize a program for the rapid response to vehicle maintenance issues. Contractor shall be expected to repair or replace any vehicle that is in service and that experiences a mechanical problem within thirty (30) minutes of report of the problem. Contractor's road call response plan should include a provision for the safe and prompt towing of any vehicle that cannot be repaired expeditiously in the field.

II-D-23 Vehicle Maintenance

At a minimum, the vehicle exterior and interior must be completely cleaned on a daily basis. The Contractor shall be responsible for keeping the interior free of litter and ensuring that the floor and all seats are clean.

The Contractor will be responsible for providing complete maintenance and service of vehicles; including radios. This also includes regular preventive maintenance and record keeping, mechanical repairs, tires, parts, and labor. Regular preventive maintenance inspections must be conducted in accordance with AAATA's maintenance plan as described below. See Exhibit #4 for AAATA Preventive Maintenance Schedules. Random unannounced maintenance inspections will be conducted by AAATA Staff to verify regular preventative maintenance schedules and safe conditions of operational vehicles.

The small bus preventative maintenance (PM) process is to be performed routinely with the frequency determined by operational miles. The engine fuel type will determine the frequency of the interval. The three separate PM intervals for Small Vehicle Preventive Maintenance Procedure are listed below.

- Gasoline-Powered Vehicles:
- PM INSPECTION A is performed every 3,000 miles,
- PM INSPECTION B inspection is performed at the 15,000-mile intervals and includes the preventive maintenance items covered in PM-A
- PM INSPECTION C is performed at 30,000-mile intervals and includes the preventive maintenance items covered in PM-A and PM-B.
- Diesel-Powered Vehicles:

- PM INSPECTION A is performed every 5,000 miles,
- PM INSPECTION B inspection is performed at the 15,000-mile intervals and includes the preventive maintenance items covered in PM-A
- PM INSPECTION C is performed at 30,000-mile intervals and includes the preventive maintenance items covered in PM-A and PM-B.

There are minor differences in these inspections, but all are designed to meet or exceed the manufacturer's recommendations on the proper service and inspection intervals for severe service use of the vehicle.
The Contractor shall be responsible for creating a Preventative Maintenance Program that complies with the manufactures requirements, AAATA preventative maintenance guidelines, and the FTA preventative maintenance guidelines.

AAATA vehicles used by Contractor must only be used for passenger transportation in fulfillment of the Contract. No AAATA vehicles may be used outside of AAATA's service area, for non-contracted purposes, or for towing, pushing, carriage of goods, storage, or other non-passenger transportation use.

The Contractor shall maintain and operate the vehicles and other equipment at its own expense, in accordance with manufactures requirements, AAATA preventative maintenance guidelines, and the FTA preventative maintenance guidelines. Respondents must describe in the proposal how they maintain their current fleet vehicles.

The Contractor shall perform daily checks of all vehicles required to service this contract. The Contractor shall keep a record of these checks and provide them to AAATA Staff if and when requested. As part of the vehicle maintenance plan a daily inspection checklist must be used to document all daily inspections for vehicles in service as part of this contract. Refer to Exhibit 5 for an example of a daily inspection checklist.

II-D-24 Vehicle Signage

For passenger recognition purposes all dedicated and non-dedicated vehicles used to perform A-Ride service shall have a logo on the outside of the vehicle, identifying the vehicle as providing AAATA A-Ride Service. AAATA will provide the logo. Non-dedicated vehicles must have a uniform appearance. Deviations to this part will be considered on a case by case basis and must be mutually agreed upon by both parties.

II-D-25 Automatic Vehicle Locater and Mobile Data Terminals

Prior to the start date of the contract, AAATA may begin installation of the CAD/AVL system which will include mobile devices (MDT) for communicating with drivers. AAATA will be responsible for training Contractor key personnel on how to use the equipment, the reporting requirements, and procedures for replacing equipment when necessary. The Contractor will be responsible for training its personnel to competently use the equipment and for the accuracy of information entered. The Contractor will be responsible for using all functions of AAATA's CAD/AVL and MDT technology for delivery of service and collection of data and reporting as required by AAATA. AAATA will provide the MDT specifications and functionality requirements for the Contractor to meet the communication needs to service the Customers. AAATA requires the Contractor to provide dedicated non-accessible vehicles equipped with MDT technologies with functions compatible with Trapeze Pass program, or similar future solution, to meet daily demand and reporting with AAATA.

II-D-26 Communication with Operators

The Contractor will be responsible for having voice and data communication systems for accessible and non-accessible vehicles. AAATA will provide the voice and data communication equipment required for AAATA-owned vehicles. The Contractor will be responsible for monitoring voice and data communications at all times.

Upon installation and deployment of the MDT equipment, AAATA and the Contractor may use text messaging for communication. The Contractor must ensure that voice and data communication system equipment are maintained and in a state of good repair for the duration of services being provided to AAATA. Upon delivery of an AAATA-owned vehicle needing repair to the AAATA maintenance facility, AAATA will maintain the voice and data communication equipment.

II-D-27 Communication with AAATA

Communication between AAATA and the Contractor is essential. The Contractor's key personnel must be available by telephone whenever service is operating. Telephones numbers for the Contract Manager and the on-duty supervisor are required so that ready access is possible. An up-to-date contact list of key personnel including home telephone numbers is also required.

The Contractor shall be required to meet at least once per month with the A-Ride Project Manager or other personnel to discuss any aspect of the service as deemed necessary by AAATA. It is required that Contractor key personnel attend AAATA's monthly Local Advisory Committee meetings.

II-D-28 Staffing

Contract Management

The Contractor is required to identify a Project Manager who will be responsible for the satisfactory operation of all aspects of service provided under the contract.

A. This person will serve as the point of contact for communication with the AAATA and will attend all Local Advisory Committee meetings, monthly meetings with AAATA staff for contract coordination and other meetings when requested. This person must be proficient with Title II of the ADA regarding Complementary Paratransit services and all aspects of service as outlined within this contract. The Contractor's Project Manager may not be replaced without the prior approval of the AAATA.

B. At all times that service is in operation and whenever passengers are being transported the Contractor is required to have a staff capable of supervising service deliver and communicating with staff, passengers and the AAATA.

C. AAATA reserves the right to review and approve the vendor's key personal including but not limited to Senior Managers, dispatching personal, maintenance personal, and others AAATA deems necessary to fulfill the contract.

D. AAATA reserves the right require the removal of the Project Manager and other key personnel, if AAATA determines that conditions so warrant removal.

E. The Contractor must cooperate with AAATA and any other agency when audits are conducted on any aspect of the service such as the Drug and Alcohol program

F. The Contractor must maintain a telephone line, other than the main customer call in line, so that AAATA can use to communicate to the Contractor's dispatcher on duty.

G. The Contractor's Project Manager or designee should be available via phone 24 hours a day in case of emergency.

H. At a minimum the Contractor is require to provide sufficient Call Takers to achieve a standard that calls will be answered within the established performance standards.

I. The contractor will provide equipment such as an Automatic Call Distribution System (ADC) or similar that can monitor calls on hold and produce reports that demonstrate compliance.

J. Call Takers shall be sufficiently trained in all aspects of their position including but not limited to AAATA services, scheduling operations, the telephone system or other communication devices such as TDD as required by the ADA.

K. The Contractor is required to provide a TDD in order to communicate with customers who are hearing impaired and any other communications equipment or services such as the Michigan Relay system, which may be required for ADA compliance.

II-D-29 Monitoring

Monitoring is a process AAATA uses to oversee and check the Contractor's performance to ensure performance standards are being met. AAATA reserves the right to use any or all of the below monitoring techniques.

A. Financial Audits or Financial Reviews
B. Customer Surveys
C. U.S. DOT National Transit Database (NTD) Reports
D. Monthly Management Performance Reports
E. Random Phone Calls
F. Unannounced Visits
G. Undercover Rides
H. Vehicle/Maintenance Records
I. Monitor Radio Communications
J. Monitor Vehicle and Trip Scheduling via Network Access

II-D-30 Contractor Facility, Vehicle Fueling, and Vehicle Parking

The Contractor will be responsible for vehicle fueling. Vehicle safety is extremely important. The Contractor shall describe in detail its safety and security measures used for vehicle fueling. The contractor is prohibited from fueling any vehicle with a rider on board. AAATA will reimburse the Contractor all revenue mile fuel costs, except from missed-trips, associated with the delivery of service under this contract.

A. FUEL PASS-THROUGH: The Authority will pay for the direct cost of fuel used to provide service under this contact, net of Federal and State fuel taxes. Fuel cost will be calculated monthly based on the total vehicle miles provided under this contract divided by the miles per gallon of each vehicle used multiplied times the actual cost of fuel, net of taxes, purchased by the contractor. The monthly schedule calculating the fuel reimbursement pass-through is attached as part of the monthly invoice format in Exhibit 7.

B. FUEL TAX RECOVERY: The Contractor shall be responsible for collecting the fuel tax recovery from Federal government and State of Michigan. AAATA will work with the Contractor to resolve any problems if they occur.

C. FACILITY: The Contractor will be responsible for securing a location within the service area in which to operate the services and terms of this contract. Proposed facilities must be fully accessible and compliant with ADA requirements. Vehicles shall be protected at all times from theft and vandalism. Proposals should include a description of security measures used for prevention of theft and vandalism.

II-D-31 Drug and Alcohol Policy

It is the policy of AAATA to provide safe and dependable transportation, promote and maintain a safe and healthy working environment for all employees, protect our employees, passengers, and the public from risks posed by use of alcohol and drugs, and to comply with all applicable state and federal laws and regulations. This is a zero tolerance policy that must be complied with by the Contractor. The Contractor must implement a Drug and Alcohol Policy that meets the requirements defined by Federal Transit Administration (FTA) regulations.

When Drug and Alcohol Testing May Be Required

Pursuant to 49 CFR Part 655, employees (and applicants) shall be required to submit to urine testing for use of prohibited drugs and/or breathalyzer alcohol testing. Employees shall be required to submit to drug testing at any time while they are on duty. Employees shall be required to submit to alcohol testing at any time while performing safety-sensitive functions; just before beginning the performance of safety sensitive functions, or just after completing the performance of safety sensitive functions. Drug testing and alcohol testing will take place in the following circumstances:

(1) Prior to employment in or transfer to a safety-sensitive position.

The employee (or applicant) must have a verified negative drug test and an alcohol test indicating an alcohol concentration of less than 0.02 before performing any safety-sensitive functions. If an applicant's or employee's drug test is canceled, the employee or applicant must satisfactorily complete another pre-employment drug test before being considered for hire or transfer.

When a covered employee or applicant has not performed a safety-sensitive function for 90 consecutive calendar days regardless of the reason, and the employee has not been in the Contractor's random selection pool during that time, the Contractor shall ensure that the employee takes a pre-employment drug test with a verified negative result before returning to safety-sensitive duties.

(2) When the Authority or the Contractor has reasonable suspicion that a safety-sensitive employee has used a prohibited drug, or has engaged in prohibited conduct regarding the use of alcohol.

For purposes of this rule, reasonable suspicion shall be based upon specific, contemporaneous, articulable observations concerning the appearance, behavior, speech, or body odors of the employee. The required observations must be made by a supervisor who is trained in detecting the signs and symptoms of drug use and/or the misuse of alcohol.

(3) When a safety-sensitive employee is involved in an accident, and drug and alcohol testing is required under applicable federal regulations.

Testing is required when a safety-sensitive employee is involved in an accident which results in a fatality; or is involved in a non-fatal accident (a) which results in bodily injury requiring treatment away from the scene of the accident, or (b) where one or more vehicles incurs disabling damage that requires towing from the scene, unless the employer determines, using the best information available at the time of the decision, that the employee's performance can be completely discounted as a contributing factor to the accident.

Following an accident requiring testing, the Contractor is also required to test any other safety-sensitive employee whose performance could have contributed to the accident, as determined by the employer using the best information available at the time of the decision.

The employee shall be tested as soon as practicable following the accident, not to exceed 8 hours for alcohol testing and 32 hours for drug testing. An employee required to undergo post-accident testing shall refrain from alcohol use for 8 hours following the accident, or until s/he undergoes a post-accident alcohol test. Any employee who fails to remain readily available for post-accident testing may be deemed to have refused to submit to such testing.

(4) As part of a random drug and alcohol testing program for safety-sensitive employees implemented under applicable federal regulations. The Contractor shall meet the requirements of these regulations with respect to the minimum annual percentage rates for random testing, the selection of employees for random testing, and the timing of random tests Random alcohol tests shall be unannounced and immediate. Random testing shall be reasonably distributed throughout all periods during which safety sensitive services are being performed. Randomly selected covered employees shall be subject to being tested on any day, and at any time during the day, in which they are at work. Selected employees shall proceed to the alcohol test site immediately upon notification. Whenever possible, selected employees shall be accompanied to the test site by a supervisor.

(5) As part of a return to duty testing program for safety-sensitive employees implemented under applicable federal regulations. Return to duty testing requires following the “directly observed specimen collection” procedures found in 40.67 of the revised 49 CFR. Return to duty testing is required after a verified positive drug test, an alcohol test indicating an alcohol concentration of 0.04 or greater, violation of the restrictions regarding pre-duty or on-duty use of alcohol, or refusal to submit to a required drug or alcohol test.

In order to return to duty, including returning to duty following an absence away from work for more than 90 consecutive days for any reason, the employee must have a verified negative drug test and/or an alcohol test indicating an alcohol concentration of less than 0.02. When applicable, the employee must also be evaluated and released by the Authority's Substance Abuse Professional (SAP), who may recommend additional types of testing.

(6) As part of a follow-up testing program for safety-sensitive employees implemented under applicable federal regulations. Follow-up testing requires following the “directly observed specimen collection: procedures found in 40.67 of the revised 49 CFR.

After returning to duty, an employee who has committed a drug or alcohol violation under the federal regulations shall be subject to unannounced follow-up drug and/or alcohol testing. The number and frequency of such tests shall be as directed by the SAP, and shall consist of at least 6 tests in the first 12 months following the employee's return to duty.

Follow-up testing may include additional types of testing based on the SAP's recommendations. However, the follow-up testing period shall not exceed 60 months from the date of the employee's return to duty.

The following testing is not required to comply with Federal Laws but it is recommended that the Contractor develop a screening process requiring applicants and employees to submit to urine testing for use of drugs, including the five (5) drugs listed above, and/or breathalyzer alcohol testing in the following circumstances:

- As part of a fitness for duty physical examination following extended illness or leave of absence, any other periodic physical examination, or prior to employment in a non-safety-sensitive position.

- When an employee's performance and/or attendance record or verified information submitted by a supervisory employee or a complainant creates a reasonable suspicion that alcohol, controlled substances including the drugs listed above, synthetic narcotics, designer drugs, or prescription drugs are present in the employee's system.

- When an employee suffers an occupational on-the-job injury (requiring treatment from a physician), or following a serious or potentially serious accident or incident in which safety precautions were violated, equipment or property was damaged, an employee or other person was injured, unsafe instructions or orders were given by the employee, or unusually careless acts were performed by the employee. In the case of on-the-job injuries, special consideration will be given to whether the injury occurred through no fault of the employee.

- As a result of a condition of continued employment or reinstatement following the employee's participation in or completion of an Authority-approved drug and/or alcohol treatment, counseling or rehabilitation program, and/or as part of a return to duty test or follow-up testing required as a condition of reinstatement following a disciplinary suspension.

- When any prohibited substance, including an alcoholic beverage, or any unauthorized item such as an alcoholic beverage container or drug paraphernalia is found in an area controlled or used by the employee.

- When the laboratory values in any authorized drug test indicate the need for additional testing, as determined by the Medical Review Officer (MRO), or where any authorized drug test must be cancelled due to a collection, chain of custody or other procedural problem.

FAILURE TO COMPLY WITH THE ABOVE POLICIES AND PROCEDURES WILL RESULT IN THE TERMINATION OF THE CONTRACT.

II-D-32 Operating Costs

The Contractor shall be responsible for the following but not limited to:

1. Contractor employee wages and benefits including insurance
2. Vehicle maintenance expenses
3. All vehicle fluids including fuel and oil (with the exception of fuel reimbursement in AAATA owned vehicles)
4. Vehicle insurance
5. Worker's compensation insurance
6. Pre-employment expenses including testing
7. Employee Training
8. Computer and communication equipment, services and repairs (with the exception of Trapeze PASS)
9. Uncollected passenger fares and fees
10. Licenses
11. All applicable taxes, bonds, and any licenses required by state or local ordinances
12. Drug & Alcohol Testing & Reporting

II-D-33 Marketing & Distribution of Materials

AAATA will be responsible for providing all public information materials on the service. The Contractor shall be responsible for keeping the vehicles stocked with AAATA printed materials. The Contractor shall be responsible for assisting in the distribution of public information and training of drivers to inform the public and passengers of all AAATA services. The Contractor shall cooperate in the performance of passenger surveying efforts. The Contractor shall work with AAATA on co-branding all non-accessible vehicles used for operations under this contract for the life of this contract. The Contractor and drivers are prohibited from engaging in oral or written solicitation for any cause or purpose while providing service. Distributing literature, other than provided or approved by AAATA, is prohibited while providing service.

II-D-34 Lost and Found Items

Operators must check the vehicle driven at the end of each day. Any items that customers have left behind must be given to a Contractor employee who will be responsible for maintaining a log of lost items. All items that have been left behind and that are not perishable must be logged and reported to AAATA weekly, valuables are kept for 30 days, non-valuables for 14 days.

II-D-35 Computer Software

AAATA will provide access to all computer software are required for the booking, scheduling, and dispatching of advanced reserved trips and tracking vehicle maintenance procedures by supplying remote access. The Contractor shall supply dedicated equipment with internet capability to access AAATA's data for the life of the contract. This shall be approved by the AAATA during the Contractor training period.

- AAATA will provide training for key Contractor personnel on use of computer programs required by AAATA.
- Contractor must state willingness to comply with all computer software licensing criteria.
- The Contractor is expected to become proficient in the use of the software. Contractors should describe any and all equipment and software that may be used to supplement Trapeze (or its successors).

II-D-36 General Requirements

Timeliness: The contract will be awarded to a successful bidder in the summer of 2014. Upon the award of the contract, the service Contractor can begin to develop a service implementation plan with AAATA. Services will begin May 1, 2015.

Meetings: The successful respondent (Contractor) shall meet with the AAATA project manager during the project at least monthly. These sessions may be conducted in person, or via e-mail, as determined by the AAATA Project Manager. The Contractor shall make immediate phone calls to the AAATA Project Manager when any significant problems are encountered or for any issues that affect the delivery of service.
Oral Presentations: In addition to any committee and/or community outreach meetings established in the scope of work, the contractor may also make other presentations as required by AAATA.
Progress Reports: The successful respondent shall provide monthly written progress memos to AAATA's Project Manager. These reports will identify work accomplished, problems encountered during the past month, methodology and timeline for resolving these problems and the activities planned for the upcoming month. These memos shall be provided to the Project Manager by the 10th day of each month. The report can be faxed, mailed or e-mailed to the Project Manager.
Project Reports: The Contractor will provide to the Project Manager any reports concerning any special projects as may be assigned from time-to-time by AAATA:

II-D-37 Historical Ridership, Hours, and Mileage Information

The information listed below for the period of October 1, 2012 through September 30, 2013 is provided so that Contractors will have sufficient information to prepare price quotes.

	Billable Passengers	Service Billed	Hours (Total)	Miles (Total)
Weekday	119,671	$3,063,396		
Saturday	8,772			
Sunday	6,586			
Total	135,029	$3,063,396	63,237	1,068,396

II-D-38 Insurance

Contractor must provide AAATA with certificates of insurance from responsible carriers for the types and amounts of coverage listed below. All insurance coverage must include a provision that requires that AAATA receive thirty (30) days' written notice in the event of cancellation.

- Worker's Compensation and Employer's Liability Insurance – Worker's Compensation in compliance with the applicable state and federal laws.
- Commercial General Liability Insurance, including Professional Liability, Blanket contractual, XCU Hazards, Broad Form Property Damage, Completed Operations and Independent Contractor's Liability all applicable to Personal Injury, Bodily Injury and Property Damage to a combined single limit of $1,000,000.00 each occurrence/claim subject to $5,000,000.00 annual aggregate for Professional Liability, Completed Operations, and Personal Injury other than Bodily Injury. The insurance must state AAATA as additionally covered
- Automobile Liability Insurance, including owned, hired and non-owned automobiles, Bodily Injury and Property Damage to a combined single limit of $1,000,000.00

II-E Detailed Work Plan

Within 10 working days of the award of the contract, the Contractor will submit to AAATA's Project Manager, for discussion, review and approval, an adjusted technical work plan, including the following:

- The Contractor final project organization structure.

- The Contractor's (and subcontractors) detailed personnel list with names, titles, addresses, telephone numbers, fax numbers, e-mail addresses and any other critical information, by task if appropriate.
- The project implementation plan showing activities and tasks, decision points, and resources (person hours or days) required and allocated to the work plan.
- The time-phases planned for completing implementation of the plan.

Within one week following the submittal of the detailed work plan, the Contractor's representative will meet with AAATA's Project Manager to review the components of the work plan and to finalize the direction of the project.

II-F Proposal Requirements

Vendor technical proposals will contain, at a minimum, the information indicated below in a separate sealed envelope from the price proposal:

- Provide a brief profile of the firm, including its principal line of business, the year founded, form of organization, number and location of offices, licenses held. Identify any conditions that may impede the Offeror's ability to provide the service for the length of the contract term.
- Respondent must provide detailed response to each item in the Scope of Work demonstrating the Respondent's understanding and ability to satisfactorily perform each item.
- Statement describing the Respondent's understanding of AAATA's stated goals.
- Qualifications of the Primary Contractor and each sub-contractor (if any)
- A list of any work that is to be sub-contracted and a description of the qualifications of the Prime Contractor and each Sub-Contractor on the team.
- Qualifications of the key individuals assigned to the project.
- Past experience on similar projects – at least 3 examples for the prime and each sub-contractor, limited to two (2) pages each.
- List of at least three (3) references of similar work, including specific contact names, addresses, telephone numbers, fax numbers and e-mail addresses.
- Names, addresses, and tasks of each DBE firm to be involved in the project.
- Statement of Agreement with AAATA Standard Terms & Conditions and the RFP.
- Statement of compliance and agreement to continue compliance with Federal and State laws and regulations, including regulations of the Federal Transit Administration ("FTA") and the Michigan Department of Transportation ("MDOT").
- All documents included in Appendix A (filled out and signed).
- A description of the Respondent's Quality Assurance Program.
- A detailed description of the Respondent's Transition Plan, if applicable.
- A detailed description of how the Respondent will meet AAATA's vehicle maintenance standards.
- An organizational chart of the Respondent and all Sub-Contractors.
- The name and telephone number of person(s) in the Respondent's organization authorized to negotiate/expedite the proposed contract with AAATA.
- Additional Information and Comment – include any other information that is believed to be pertinent, but not specifically asked for elsewhere.

II-G Cost of Project

Respondents are to include with their proposal in a separate sealed envelope from the technical proposal a detailed cost per passenger for each of the five years of the proposed contract. Details must include all components used to arrive at the cost per passenger, for each of the five years of the proposed contract. The Price Proposal must contain:

- A. Price Proposal Form
- B. Audited financial statements for the past year.
- C. A statement from the Offeror's insurer that the Offeror has or can obtain the required insurance.

Exhibit 5: Select Ride's Budget Proposal

September 25, 2014

Ms. Michelle Whitlow, CPPO, CPPB
Manager of Purchasing
Ann Arbor Area Transportation Authority
2700 S. Industrial Hwy.
Ann Arbor, MI 48104

Re: Follow-up to Meeting

It was our pleasure to meet with you this week regarding questions for the upcoming contract with the Ann Arbor Area Transportation Authority.

Below is our response to Question #11 AAATA submitted.

11. Please state and clearly demonstrate that the following specifications of the RFP will be met:
    - II-D-5: Reservations, Scheduling, Dispatching, and Trips

In addition to our response starting on page 6, Section D.5 Select Ride will comply with the requirements of this section.

After careful review of our price proposal submitted to AAATA we find we are unable to lower our price due to the very thin margin of profit to our company we have already submitted and therefore will not be submitting a new price proposal at this time.

However, we would be pleased to review and study the requirements of the Authority and its patrons indepth and offer any suggestions that we can do to lower costs and see how we can work together to reduce costs in the future.

In the meantime, we have listed the following for your consideration:

- Drop $5,000,000 Umbrella Policy – unnecessary, cost would be lowered by $30,000
- 20 Minute pick up window on Same Days and Will Calls—expand to original 45
- Advance booking window—decrease to one day from seven days\
- 30 minute pick up window for Advance reservations

It has been our great pleasure to provide A-Ride and Good as Good services to the Ann Arbor Area Transportation Authority and our mutual patrons for these past thirty years, and we hope to have the honor and privilege of doing so for at least another thirty years as we move forward together.

Very truly yours,
SELECT RIDE, INC.

David R. Reid
President

SelectRide Proposal

Accrual Cost Proposal						
	Cost item	Year 1	Year 2	Year 3	Year 4	Year 5
LEVEL OF SERVICE						
A	Vehicle-hour	69,311	74,855	80,399	85,943	91,490
	a. AAATA accessible vehicles	38,121	39,524	40,879	42,191	43,465
	b. Contractor non-accessible vehicles	31,190	35,331	39,520	43,752	48,025
B	Vehicle-mile (maintenance personnel)	1,084,239	1,170,978	1,257,718	1,344,458	1,431,195
	a. AAATA accessible vehicles	596,331	618,280	639,488	660,022	679,929
	b. Contractor non-accessible vehicles	487,908	552,698	618,230	684,436	751,266
C	Vehicles	15	15	15	15	15
D	One-way passenger-trips	142,758	151,528	159,880	167,848	175,447
VARIABLE COST RATES						
E	Variable rate: cost/vehicle-hour	$ 24.64	$ 26.36	$ 27.36	$ 28.46	$ 29.65
F	Variable rate: cost/vehicle-mile (maintenance personnel)	$ 0.13	$ 0.13	$ 0.14	$ 0.15	$ 0.15
G	Variable rate: cost/vehicle-mile (maintenance parts and	$ 0.071	$ 0.073	$ 0.075	$ 0.075	$ 0.080
H	Variable rate: cost/vehicle-mile (fuel) (assume $3.50 gas,	$ 0.28	$ 0.27	$ 0.27	$ 0.26	$ 0.26
	a. AAATA vehicles (assume 10 mpg)	$ 0.40	$ 0.40	$ 0.40	$ 0.40	$ 0.40
	b. Contractor vehicles	$ 0.13	$ 0.13	$ 0.13	$ 0.13	$ 0.13
VARIABLE COSTS						
I	Vehicle costs for vehicles-hours = A x E	$1,708,074.04	$1,973,065.86	$ 2,200,085.01	$2,446,220.78	$2,712,490.48
J	Vehicle costs for vehicle-miles (maintenance personnel) = B x F	$ 140,951.07	$ 152,227.14	$ 176,080.52	$ 201,668.70	$ 214,679.25
K	Vehicle costs for vehicle-miles (maintenance parts and supplies) = B x G	$ 76,980.97	$ 85,481.39	$ 94,328.85	$ 100,834.35	$ 114,495.60
L	Vehicle costs for vehicle-miles (fuel) = B x H	*$ 301,960.44*	*$ 319,162.74*	*$ 336,165.10*	*$ 352,985.48*	*$ 369,636.18*
VARIABLE COST NOT BASED ON MILES OR HOURS						
M	Variable costs for facility utilities	$ 34,292.42	$ 35,321.19	$ 36,380.83	$ 37,472.25	$ 38,596.42
N	Variable costs for other;(specify"other")	$ -	$ -	$ -	$ -	$ -
O	**Total variable costs = I+J+K+L+M+N**	$2,262,258.94	$2,565,258.32	$ 2,843,040.31	$3,139,181.56	$3,449,897.93
FIXED COSTS						
P	Fixed costs: General local management	$ 142,280.96	$ 146,549.39	$ 150,945.87	$ 155,474.25	$ 160,138.47
Q	Fixed costs: Safety and training	$ 29,877.54	$ 30,773.87	$ 31,697.08	$ 32,647.99	$ 33,627.43
R	Fixed costs: Dispatching/street supervision	$ 217,887.93	$ 224,424.57	$ 231,157.30	$ 238,092.02	$ 245,234.78
S	Fixed costs: orporate overhead, management fees, profit, etc.	$ 80,072.76	$ 87,177.20	$ 93,745.64	$ 100,711.66	$ 108,000.49
T	Fixed costs: Amortized start-up	$ -	$ -		$ -	
U	Fixed costs: Insurance	$ 290,069.97	$ 298,772.07	$ 307,735.23	$ 316,967.29	$ 326,476.31
V	Fixed costs: Facility rental or lease	$ 80,095.02	$ 82,497.87	$ 84,972.81	$ 87,521.99	$ 90,147.65
W	Fixed costs: Depreciation	$ 142,965.31	$ 147,254.27	$ 151,671.89	$ 156,222.05	$ 160,908.71
X	Other; (specify "other")	$ -	$ -	$ -	$ -	$ -
Y	**Total fixed costs = P+Q+R+S+T+U+V+W+X**	$ 983,249.49	$1,017,449.24	$ 1,051,925.82	$1,087,637.25	$1,124,533.84
Z	**TOTAL PROPOSED COSTS = O+Y**	**$3,245,508.43**	**$3,582,707.56**	**$ 3,894,966.13**	**$4,226,818.81**	**$4,574,431.77**
	AAATA Maximum Budget For Each Year	$3,252,564.00	$3,602,222.00	$ 3,968,099.00	$4,349,135.00	$4,747,504.00

Resolution 2/2015

APPROVAL OF CONTRACT AWARD FOR PURCHASE OF
MAINTENANCE AND PURCHASING SOFTWARE

WHEREAS, Ann Arbor Area Transportation Authority (AAATA) requires maintenance and purchasing software to support Vehicle Maintenance, Inventory and Purchasing functions, and

WHEREAS, AAATA's current maintenance and purchasing software, Ultramain, is built on a version of Progress software which is outdated and very difficult to support, and

WHEREAS, AAATA issued Request for Proposal (RFP) 2014-03 - Maintenance and Purchasing Software for the provision, installation and implementation of commercial software to replace Ultramain, and

WHEREAS, two (2) responses were received, and

WHEREAS, AAATA staff evaluated the proposals and determined that the submittal from Trapeze Software Group of Cedar Rapids, IA for Enterprise Asset Management (EAM) software was most responsive and responsible, and

WHEREAS, EAM software meets AAATA's specifications to support the vehicle maintenance, inventory and purchasing functions, and

WHEREAS, EAM software is a commercial product in use by over 90 transit customers in the United States, and

WHEREAS, the transition to EAM software will have limited, if any, impact on the customers' experience at the time of service consumption, and

WHEREAS, an anticipated benefit of the EAM software is that AAATA staff will have more efficient tools for planning and providing services, and

WHEREAS, key AAATA staff members will invest varying degrees of time and effort over the course of approximately two (2) months transferring key data from the current software into the EAM software, and

WHEREAS, approximately 95% of the non-union staff and all of the maintenance staff with vehicle maintenance responsibilities will require time and training to begin using the EAM software, and the time and effort required of each staff member varies in accordance with their current and anticipated use of the software, and

WHEREAS, AAATA has anticipated and planned for the investment of staff time and effort to make the transition to new software, and

WHEREAS, the cost of acquiring, implementing and training staff to use the software is $653,883, and

WHEREAS, the cost for Maintenance and License Fees for Years 1, 2, 3, 4 and 5 would total an additional $131,062 (~$250,000 less than Ultramain over five years) and AAATA would pay the fees annually as they became due, therefore

IT IS RESOLVED, that the Ann Arbor Area Transportation Authority Board of Directors authorizes the Chief Executive Officer to execute a contract with Trapeze Software Group for the purchase and implementation of EAM software and maintenance and license fees for Years 1, 2, 3, 4 and 5.

_____	_____
Charles Griffith, Chair	Susan Baskett, Secretary
October 16, 2014	October 16, 2014

To: Planning and Development Committee

From: Michelle Whitlow, CPPO, CPPB, Manager of Purchasing

Date: October 1, 2014

Re: **Award New Contract for Purchase of Maintenance and Purchasing Software**

Background

In 2006, AAATA purchased and implemented Ultramain software to support Vehicle Maintenance, Inventory and Purchasing functions. This was the first time AAATA had one software system to support all three of these functions; prior to this, AAATA used several software packages to facilitate work in these areas.

At the time of purchase, Ultramain software was much used in the airline industry, but new to the bus transportation industry. Two other bus transit agencies were using Ultramain and AAATA staff spoke with staff at both agencies about their experiences with the software. The most extensive conversations took place with staff at the Greater Cleveland Regional Transit Authority (GCRTA) which had recently (within the last 18 months) purchased the software.

Ultramain Inc., the owner of the software, provided AAATA with a highly-customized version of the software to meet AAATA's specifications as detailed in the Request for Proposal that AAATA had issued. Upon award of a contract, Ultramain Inc. staff installed the software, migrated data from AAATA's other systems into Ultramain, and provided training to AAATA staff. AAATA staff began using the software in May 2006.

AAATA purchased Ultramain software for $787,429 and paid $343,690 for a five-year maintenance program. The initial five-year Maintenance agreement expired in 2011 and AAATA has paid the annual maintenance fee each year since. The most recent maintenance fee has been $74,439.

Since implementing Ultramain software, AAATA has issued (or opened) a number of Service Requests for the professionals at Ultramain Inc. to address. Presently, AAATA has 36 open Service Requests (issues, bugs, changes), 27 of these are from 2006-2008. Many previous Service Requests have been closed and not fixed because Ultramain Inc. staff cannot resolve the problems.

In 2011, AAATA decided to upgrade to the then most current level of Ultramain software so that it could take advantage of many of the software corrections that were expected to benefit AAATA. Implementing this upgrade introduced several issues that AAATA staff had to work

through. Once the patches to upgrade the software were applied, problems that had previously been resolved in the software, resurfaced. Maintenance work order functionality was especially adversely affected. AAATA therefore decided that unless the benefits of upgrading again were significant, it would not opt for another upgrade. There have been no significant reasons to upgrade for nearly four years.

AAATA currently uses Ultramain version 8 which is built on legacy Progress software – a version of Progress that is very old and difficult to support. This makes it hard, if not impossible, for Ultramain Inc. staff to correct problems AAATA experiences with the software.

Researching a Solution

Given the existing problems that were unresolved and that Progress software was no longer supported, AAATA staff began researching other options and developing specifications for new software. To do this with as much information as possible, staff communicated at length with other bus transit agencies about the software they use for maintenance, inventory and purchasing functions. Conversations with agencies included, but was not limited to:

Capital Area Transportation Authority (CATA), Lansing MI
Interurban Transit Partnership (The Rapid), Grand Rapids MI
Suburban Mobility Authority for Regional Transportation (SMART), Detroit MI

Staff also spoke with vendors in the industry and invited several to make presentations of their software so that AAATA could be better informed of the functions and capabilities available and in use within the bus transit field. Presentations were made by:

InfoData Corporation (SAP Business One Software)
AssetWorks / FleetFocus
HP Enterprise Services
Maximo

As a result of their research, AAATA staff concluded:

- replacing the software would affect about 75% of non-bargaining unit staff,
- other agencies were using software that was easier to use, gave better access to information, and required less correction by the software provider/manufacturer,
- other software existed that could integrate with AAATA's finance system and provide realtime budget information,
- replacement software would cost (in 2012) approximately $500,000,
- there was $500,000 programmed in 2014 Capital and Categorical grants,
- that the best software would be an off-the-shelf (OTS) product with existing and proven interfaces to Great Plains and Fleetwatch (which AAATA currently uses).

Issuing a Request for Proposal

On February 20, 2014, AAATA issued Request for Proposal (RFP) 2014-03 for Maintenance and Purchasing Software for the provision, installation and implementation of commercial software to replace Ultramain. The software would support Vehicle Maintenance, Inventory and Purchasing.

While AAATA preferred to purchase one (1) software system that provided support for all three of the above listed functions, it would consider proposals that provided one (1) software system for maintenance and inventory and another software system for purchasing so long as the two software systems were compatible and there was satisfactory evidence of the systems integrating well together.

The RFP was posted online at the Michigan Inter-governmental Trade Network (MITN) Bid System where 237 vendors were sent notices; 38 of which viewed the solicitation. The RFP was advertised in *Washtenaw County Legal News* and in *Passenger Transport* (a publication of the American Public Transportation Association) and on AAATA's website, theride.org. Additionally, bid notifications were emailed to four vendors known to offer similar software.

A Pre-Proposal Conference Call was held on March 11, 2014 and seven (7) people representing five (5) firms participated.

On April 4, 2014, AAATA received two (2) proposals:

FleetAware (Riverside, CA)
Trapeze Software Group (Cedar Rapids, IA)

Each proposal offered a software system that provided support for all three functions: vehicle maintenance, inventory and purchasing. The proposals varied greatly in that FleetAware offered a product that would be more customized/less off-the-shelf and was relatively new to the industry. Trapeze Software Group offered their Enterprise Asset Management (EAM) software, an off-the-shelf product used by over 90 customers throughout the United States.

Staff evaluated the proposals based on the vendor's products and services, experience and qualifications, staffing and organization, work plan and price. Trapeze's proposal was rated highest and the vendor was brought in to present their software and interview with AAATA staff. AAATA also spoke with several current customers using the software.

Transit agencies using EAM software includes:

Capital Area Transportation Authority (CATA), Lansing MI
Central Florida Regional Transportation Authority (LYNX), Orlando FL
Chicago Transit Authority (CTA), Chicago IL
Connecticut Transit
Denver Regional Transportation District (Denver RTD), Denver CO
Des Moines Area Transit Authority (DART), Des Moines IA
Hillsborough Area Regional Transit (HART), Tampa FL
Interurban Transit Partnership (The Rapid), Grand Rapids MI
Massachusetts Bay Transportation Authority (MBTA), Boston MA
Metropolitan Transit Authority of Harris County (Houston METRO), Houston TX
University of Massachusetts Transit Services (UMASS)
Santa Barbara Metropolitan Transit District (MTD), Santa Barbara CA
Santa Monica Municipal Bus Line (Big Blue Bus), Santa Monica CA
Stark Area Regional Transit Authority (SARTA), Canton OH
Suburban Mobility Authority for Regional Transportation (SMART), Detroit MI

AAATA staff analyzed Trapeze's price proposal and identified tasks and that could be done in-house or eliminated to reduce the overall cost. In the end, AAATA requested and received a Best and Final Offer from Trapeze for $653,883. Maintenance and License Fees for Years 1, 2, 3, 4 and 5 would total an additional $131,062 and AAATA would pay the fees annually as they became due.

Software, Implementation, Training	$530,383	
Developing of Routing of Requests and Awards	$ 36,000	
Historical Data Load	$ 33,000	
Master Data related to vehicle work orders	$ 54,500	
Software, Implementation, Training		$653,883
Maintenance and License Fee, Year 1	$ 23,719	
Maintenance and License Fee, Year 2	$ 24,905	
Maintenance and License Fee, Year 3	$ 26,150	
Maintenance and License Fee, Year 4	$ 27,458	
Maintenance and License Fee, Year 5	$ 28,831	
Maintenance and License Fee for 5 Years		$131,062
Total Award		$784,945

The EAM software is scalable and would allow for the future addition of a Capital Planning module (what Trapeze calls the State of Good Repair module) that would support the management of asset condition data and capital replacement projects over a user-defined period (for instance, 10, 20 years). AAATA staff will further consider the benefit of this possible module as they implement and work with the initial EAM software that is purchased. The State of Good Repair module is $73,000 and, while not requested in this initial purchase, adding the module in the future will not dramatically affect the price of the module.

After careful consideration, staff is recommending that the Board of Directors approve award of a contract to Trapeze Software Group of Cedar Rapids, IA for $784,945.