

Napa Valley Transportation Authority

625 Burnell Street
Napa, CA 94559



Agenda - Final

Thursday, January 11, 2024
10:00 AM

JoAnn Busenbark Board Room

Paratransit Coordinating Council (PCC)

The Napa Valley Transportation Authority (NVTA) Paratransit Coordinating Council (PCC) meeting will be held both in person with a Zoom option available for members of the public to participate. All committee members are expected to participate in person and follow the traditional Brown Act rules.

All materials relating to an agenda item for an open session of a regular meeting of the Paratransit Coordinating Council (PCC) are posted on the NVTA website at: <https://nctpa.legistar.com/Calendar.aspx>

PUBLIC MEETING GUIDELINES FOR PARTICIPATING VIA PHONE/VIDEO CONFERENCING

- 1) To join the meeting via Zoom video conference from your PC, Mac, iPad, iP 882 3261 2915
- 2) To join the Zoom meeting by phone - dial 1-669-900-6833, enter meeting ID: 882 3261 2915 If asked for the participant ID or code, press #.

Public Comments

Members of the public may comment on matters within the purview of the Committee that are not on the meeting agenda during the general public comment item at the beginning of the meeting. Comments related to a specific item on the agenda must be reserved until the time the agenda item is considered and the Chair invites public comment. Members of the public are welcome to address the Committee, however, under the Brown Act Committee members may not deliberate or take action on items not on the agenda, and generally may only listen.

Instructions for submitting a Public Comment are on the next page.

Members of the public may submit a public comment in writing by emailing info@nvta.ca.gov with PUBLIC COMMENT as the subject line (for comments related to an agenda item, please include the item number). All written comments should be 350 words or less, which corresponds to approximately 3 minutes or less of speaking time. Public comments emailed to info@nvta.ca.gov after 5 p.m. the day before the meeting will be entered into the record but not read out loud. If authors of the written correspondence would like to speak, they are free to do so and should raise their hand and the Chair will call upon them at the appropriate time.

1. To comment during a virtual meeting (Zoom), click the "Raise Your Hand" button (click on the "Participants" tab) to request to speak when Public Comment is being taken on the Agenda item. You must unmute yourself when it is your turn to make your comment for up to 3 minutes. After the allotted time, you will then be re-muted. Instructions for how to "Raise Your Hand" are available at <https://support.zoom.us/hc/en-us/articles/205566129-Raise-Hand-In-Webinar>.

2. To comment by phone, press "*9" to request to speak when Public Comment is being taken on the Agenda item. You must unmute yourself by pressing "*6" when it is your turn to make your comment, for up to 3 minutes. After the allotted time, you will be re-muted.

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Note: The methods of observing, listening, or providing public comment to the meeting may be altered due to technical difficulties or the meeting may be cancelled, if needed.

All materials relating to an agenda item for an open session of a regular meeting of the NVTA PCC are posted on the NVTA website 72 hours prior to the meeting at: <https://nctpa.legistar.com/Calendar.aspx> or by emailing info@nvta.ca.gov to request a copy of the agenda.

Materials distributed to the members of the Committee present at the meeting will be available for public inspection after the meeting. Availability of materials related to agenda items for public inspection does not include materials which are exempt from public disclosure under Government Code sections 6253.5, 6254, 6254.3, 6254.7, 6254.15, 6254.16, or 6254.22.

Americans with Disabilities Act (ADA): This Agenda shall be made available upon request in alternate formats to persons with a disability. Persons requesting a disability-related modification or accommodation should contact Kathy Alexander, NVTA Deputy Board Secretary, at (707) 259-8627 during regular business hours, at least 48 hours prior to the time of the meeting.

Note: Where times are indicated for agenda items, they are approximate and intended as estimates only, and may be shorter or longer as needed.

Acceso y el Título VI: La NVTA puede proveer asistencia/facilitar la comunicación a las personas discapacitadas y los individuos con conocimiento limitado del inglés quienes quieran dirigirse a la Autoridad. Para solicitar asistencia, por favor llame al número (707) 259-8627. Requerimos que solicite asistencia con tres días hábiles de anticipación para poderle proveer asistencia.

Ang Accessibility at Title VI: Ang NVTA ay nagkakaloob ng mga serbisyo/akomodasyon kung hilingin ang mga ito, ng mga taong may kapansanan at mga indibiduwal na may limitadong kaalaman sa wikang Ingles, na nais na matugunan ang mga bagay-bagay na may kinalaman sa NVTA PCC. Para sa mga tulong sa akomodasyon o pagsasalin-wika, mangyari lang tumawag sa (707) 259-8627. Kakailanganin namin ng paunang abiso na tatlong araw na may pasok sa trabaho para matugunan ang inyong kahilingan.

1. Call To Order
2. Roll Call
3. Public Comment
4. Committee Member Comments
5. Staff Comments

Note: Where times are indicated for the agenda items they are approximate and intended as estimates only, and may be shorter or longer, as needed.

PRESENTATIONS

**6.1 Napa Older Adults Assessment Survey Results Presentation
(Celine Regalia/BJ Bischoff)**

Recommendation: Information only

Estimated Time: 10:10 am

6.2 Vine Trail Accessibility Presentation (T.C. Hulsey)

Recommendation: Information only

Estimated Time: 10:35 a.m.

7. CONSENT AGENDA

**7.1 Meeting Minutes of November 2, 2023 Paratransit Coordinating
Council (Kathy Alexander) (Pages 7-9)**

Recommendation: PCC action will approve the November 2, 2023 Meeting Minutes

Estimated Time: 10:45 a.m.

Attachments: [Draft Minutes.pdf](#)

8. REGULAR AGENDA ITEMS

8.1 Public Transit Fare Adjustments (Rebecca Schenck) (Pages 10-31)

Recommendation: That the Paratransit Coordinating Council (PCC) review and recommend that the Napa Valley Transportation Authority (NVTA) Board approve the proposed public transit fare adjustments.

Estimated Time: 10:45 a.m.

Attachments: [Staff Report.pdf](#)

8.2 Paratransit Eligibility Standardization (Rebecca Schenck) (Pages 32-64)

Recommendation: That the Paratransit Coordinating Council (PCC) review and recommend that the Napa Valley Transportation Authority (NVTA) Board update NVTA's Transit Policies for paratransit service to 1) add a medical verification and phone interview to the eligibility determination process and 2) standardize the renewal timeline for eligibility to five (5) years in conjunction with all other Bay Area paratransit providers at its February 21, 2024 meeting.

Estimated Time: 11:00 a.m.

Attachments: [Staff Report.pdf](#)

9. FUTURE AGENDA ITEMS

10. ADJOURNMENT

10.1 The next regularly scheduled meeting for the NVTA Paratransit Coordinating Council is March 7, 2024 at 10:00 a.m.

I, Kathy Alexander, hereby certify that the agenda for the above stated meeting was posted at a location freely accessible to members of the public at the NVTA offices, 625 Burnell Street, Napa, CA by 5:00 p.m., Friday, January 5, 2024.

Kathy Alexander

Kathy Alexander, Deputy Board Secretary

Glossary of Acronyms

AB 32	Global Warming Solutions Act	FAS	Federal Aid Secondary
ABAG	Association of Bay Area Governments	FAST	Fixing America's Surface Transportation Act
ACFR	Annual Comprehensive Financial Report	FHWA	Federal Highway Administration
ADA	American with Disabilities Act	FTA	Federal Transit Administration
APA	American Planning Association	FY	Fiscal Year
ATAC	Active Transportation Advisory Committee	GHG	Greenhouse Gas
ATP	Active Transportation Program	GGRF	Greenhouse Gas Reduction Fund
BAAQMD	Bay Area Air Quality Management District	GTFS	General Transit Feed Specification
BAB	Build America Bureau	HBP	Highway Bridge Program
BART	Bay Area Rapid Transit District	HBRR	Highway Bridge Replacement and Rehabilitation Program
BATA	Bay Area Toll Authority	HIP	Housing Incentive Program
BIL	Bipartisan Infrastructure Law (IIJA)	HOT	High Occupancy Toll
BRT	Bus Rapid Transit	HOV	High Occupancy Vehicle
CAC	Citizen Advisory Committee	HR3	High Risk Rural Roads
CAP	Climate Action Plan	HSIP	Highway Safety Improvement Program
CAPTI	Climate Action Plan for Transportation Infrastructure	HTF	Highway Trust Fund
Caltrans	California Department of Transportation	HUTA	Highway Users Tax Account
CASA	Committee to House the Bay Area	HVIP	Hybrid & Zero-Emission Truck and Bus Voucher Incentive Program
CBTP	Community Based Transportation Plan	IFB	Invitation for Bid
CEQA	California Environmental Quality Act	ITIP	State Interregional Transportation Improvement Program
CIP	Capital Investment Program	ITOC	Independent Taxpayer Oversight Committee
CMA	Congestion Management Agency	IS/MND	Initial Study/Mitigated Negative Declaration
CMAQ	Congestion Mitigation and Air Quality Improvement Program	JARC	Job Access and Reverse Commute
CMP	Congestion Management Program	LCTOP	Low Carbon Transit Operations Program
CalSTA	California State Transportation Agency	LIFT	Low-Income Flexible Transportation
CTA	California Transit Association	LOS	Level of Service
CTP	Countywide Transportation Plan	LS&R	Local Streets & Roads
CTC	California Transportation Commission	LTF	Local Transportation Fund
CY	Calendar Year	MaaS	Mobility as a Service
DAA	Design Alternative Analyst	MAP 21	Moving Ahead for Progress in the 21 st Century Act
DBB	Design-Bid-Build	MPO	Metropolitan Planning Organization
DBE	Disadvantaged Business Enterprise	MTC	Metropolitan Transportation Commission
DBF	Design-Build-Finance	MTS	Metropolitan Transportation System
DBFOM	Design-Build-Finance-Operate-Maintain	ND	Negative Declaration
DED	Draft Environmental Document	NEPA	National Environmental Policy Act
EIR	Environmental Impact Report	NOAH	Natural Occurring Affordable Housing
EJ	Environmental Justice	NOC	Notice of Completion
EPC	Equity Priority Communities	NOD	Notice of Determination
ETID	Electronic Transit Information Displays		

Glossary of Acronyms

NOP	Notice of Preparation	SHA	State Highway Account
NVTA	Napa Valley Transportation Authority	SHOPP	State Highway Operation and Protection Program
NVTA-TA	Napa Valley Transportation Authority-Tax Agency	SNTDM	Solano Napa Travel Demand Model
OBAG	One Bay Area Grant	SR	State Route
PA&ED	Project Approval Environmental Document	SRTS	Safe Routes to School
P3 or PPP	Public-Private Partnership	SOV	Single-Occupant Vehicle
PCC	Paratransit Coordination Council	STA	State Transit Assistance
PCI	Pavement Condition Index	STIC	Small Transit Intensive Cities
PCA	Priority Conservation Area	STIP	State Transportation Improvement Program
PDA	Priority Development Areas	STP	Surface Transportation Program
PID	Project Initiation Document	TAC	Technical Advisory Committee
PIR	Project Initiation Report	TCM	Transportation Control Measure
PMS	Pavement Management System	TCRP	Traffic Congestion Relief Program
Prop. 42	Statewide Initiative that requires a portion of gasoline sales tax revenues be designated to transportation purposes	TDA	Transportation Development Act
PSE	Plans, Specifications and Estimates	TDM	Transportation Demand Management Transportation Demand Model
PSR	Project Study Report	TE	Transportation Enhancement
PTA	Public Transportation Account	TEA	Transportation Enhancement Activities
RACC	Regional Agency Coordinating Committee	TEA 21	Transportation Equity Act for the 21 st Century
RAISE	Rebuilding American Infrastructure with Sustainability and Equity	TFCA	Transportation Fund for Clean Air
RFP	Request for Proposal	TIP	Transportation Improvement Program
RFQ	Request for Qualifications	TIFIA	Transportation Infrastructure Finance and Innovation Act
RHNA	Regional Housing Needs Allocation	TIRCP	Transit and Intercity Rail Capital Program
RM 2	Regional Measure 2 Bridge Toll	TLC	Transportation for Livable Communities
RM 3	Regional Measure 3 Bridge Toll	TLU	Transportation and Land Use
RMRP	Road Maintenance and Rehabilitation Program	TMP	Traffic Management Plan
ROW (R/W)	Right of Way	TMS	Transportation Management System
RTEP	Regional Transit Expansion Program	TNC	Transportation Network Companies
RTIP	Regional Transportation Improvement Program	TOAH	Transit Oriented Affordable Housing
RTP	Regional Transportation Plan	TOC	Transit Oriented Communities
SAFE	Service Authority for Freeways and Expressways	TOD	Transit-Oriented Development
SAFETEA-LU	Safe, Accountable, Flexible, and Efficient Transportation Equity Act-A Legacy for Users	TOS	Transportation Operations Systems
SB 375	Sustainable Communities and Climate Protection Act 2008	TPA	Transit Priority Area
SB 1	The Road Repair and Accountability Act of 2017	TPI	Transit Performance Initiative
SCS	Sustainable Community Strategy	TPP	Transit Priority Project Areas
		VHD	Vehicle Hours of Delay
		VMT	Vehicle Miles Traveled

Napa Valley Transportation Authority

625 Burnell Street
Napa, CA 94559

Meeting Minutes - Draft Paratransit Coordinating Council (PCC)

JoAnn Busenbark Board Room

Thursday, November 2, 2023

10:00 AM

1. Call To Order

Vice Chair Sweigert called the meeting to order at 10:05 am

2. Roll Call

Present: 4 - Ellen Sweigert
Lisa DeRose-Hernandez
Jeannie Smith
Devereaux Smith

Absent: 2 - Tom Collette
Betty Rhodes

3. Public Comment

None

4. Committee Member Comments

Devereaux Smith thanked Dexter Cypress for training Molly's Angels staff on the VineGo program.

5. Staff Comments

Diana Meehan noted that NVTA released a request for proposal for the accessible transportation needs assessment. She also reported that the Napa Older Adults Assessment Survey Results presentation will be continued to the January 11, 2024 meeting.

Kathy Alexander informed the Committee that Rebecca Schenck was presenting at the CalAct conference in Southern California. She also welcomed PCC's newest member, Devereaux Smith, Executive Director of Molly's Angels and asked everyone to introduce themselves.

6. PRESENTATIONS

6.1 Napa Older Adults Assessment Survey Results Presentation (Celine Regalia/BJ Bischoff)

This item was continued to the January 11, 2024 meeting.

7. CONSENT AGENDA

- 7.1 Meeting Minutes of May 4, 2023 Paratransit Coordinating Council (Kathy Alexander) (Pages 8-9)**
- 7.2 Meeting Notes of July 13, 2023 PCC Meeting - No Quorum (Kathy Alexander) (Pages 10-11)**

MOTION by SMITH, SECOND by DE ROSE HERNANDEZ to APPROVE the Consent Calendar. Motion passed unanimously.

8. REGULAR AGENDA ITEMS

- 8.1 Nomination and Election of Chairperson and Vice Chairperson of the PCC And a Representative to the NVTA Board for the 2024 Calendar Year (Kathy Alexander) (Page 12)**

Kathy Alexander reviewed the Chair, Vice Chair and NVTA Board representative positions and called for volunteers or nominations.

Ellen Sweigert volunteered to serve as Chair, Jeannie Smith volunteered to serve as Vice Chair, Devereaux Smith volunteered to serve as the PCC representative to the NVTA Board.

MOTION by LISA DEROSE-HERNANDEZ, SECOND by JEANNIE SMITH to APPOINT Ellen Sweigert as Chair, Jeannie Smith as Vice Chair and Devereaux Smith as the PCC representative to the NVTA Board for Calendar Year 2024. Motion passed unanimously.

- 8.2 Draft 2024 Paratransit Coordinating Council (PCC) Work Plan and 2024 Meeting Calendar (Kathy Alexander) (Pages 13-15)**

Kathy Alexander reviewed the draft 2024 PCC Work Plan and the draft 2024 Meeting Calendar, noting that the January and July meetings are scheduled for the second Thursday of the month (January 11 and July 11) instead of the first Thursday.

There were no questions or comments from the Committee.

MOTION by DEVEREAUX SMITH, SECOND by DEROSE-HERNANDEZ to APPROVE the 2024 PCC Work Plan. Motion passed unanimously.

- 8.3 Federal and State Legislative Advocacy Platform and Project Priorities for Calendar Year 2024 (Danielle Schmitz) (Pages 16-21)**

Diana Meehan reviewed the Federal and State Legislative Advocacy Platform and Project Priorities for Calendar Year 2024.

There were no comments or questions from the Committee.

Information Only/No Action Taken

8.4 Americans with Disabilities Act (ADA) Self Evaluation Plan Update (Dexter Cypress) (Pages 22-93)

Dexter Cypress provided an overview of NVTA's ADA Self Evaluation Plan Update and actions taken since the last self-evaluation.

MOTION by DEROSE-HERNANDEZ, SECOND by DEVEREAUX SMITH to RECOMMEND the NVTA Board approve the Americans with Disabilities Act (ADA) Self Evaluation Plan Update. Motion passed unanimously.

8.5 Vine Quarterly Transit (Dexter Cypress) (Pages 94-99)

Dexter Cypress provided an update on Vine Transit operations for the first quarter of Fiscal Year 2023 - 2024.

9. FUTURE AGENDA ITEMS

None

10. ADJOURNMENT

10.1 The next regularly scheduled meeting for the NVTA Paratransit Coordinating Council is January 11, 2024 at 10:00 a.m.

Vice Chair Sweigert adjourned the meeting at 10:40 a.m.

Kathy Alexander

Kathy Alexander, Deputy Board Secretary



NAPA VALLEY TRANSPORTATION AUTHORITY Paratransit Coordinating Council Agenda Memo

TO: Paratransit Coordinating Council
FROM: Kate Miller, Executive Director
REPORT BY: Rebecca Schenck, Program Manager – Public Transit
(707) 259-8636 / Email: rschenck@nvta.ca.gov
SUBJECT: Public Transit Fare Adjustments

RECOMMENDATION

That the Paratransit Coordinating Council (PCC) review and recommend that the Napa Valley Transportation Authority (NVTA) Board of Directors approve the proposed public transit fare adjustments.

EXECUTIVE SUMMARY

Napa Valley Transportation Authority (NVTA), in adherence to its Fare Policies, reviews fares every three year. Adjustments are based on Consumer Price Index (CPI-U) or the percent increase in Vine expenditures for the previous three years, whichever is greater, unless the farebox ratio for the preceding fiscal year is equal to or exceeds 20%, in which case a fare increase would be paused.

Having maintained fares since 2015, NVTA proposes adjustments. The Vine adult fare would increase from \$1.60 to \$2.00, with subsequent adjustments to youth, senior/disabled fares, and various pass types. VineGo fares would increase by \$0.80 to \$4.00 for a single zone and \$8.00 for two zones. Routes 21 and 29 pass fares would increase, while the 11X aligns with Route 11 fares, offering a discount.

FISCAL IMPACT

Is there a Fiscal Impact? Yes. The proposed fare adjustments will increase fare revenue by approximately \$116,000 for the Vine at ridership levels.

BACKGROUND

In July 2014, the current NVTA Fare Policy was approved by the Paratransit Coordinating Council and Vine Consumer Advisory Committee and subsequently adopted by the NVTA Board of Directors. The Fare Policy states that:

Fare adjustments shall be considered by the NVTA Board under the following scenarios:

1. *Following NVTA’s annual report if Vine has failed to meet its farebox ratio goal defined in the fare policy.*
2. *Every three years the NVTA Board of Directors will consider fare adjustments to match the previous three years of CPI-U for the San Francisco – Oakland – San Jose Region or to match the percent increase in Vine expenditures for the previous three years whichever is greater. Unless the farebox ratio for the previous fiscal year is equal to or greater than 20%. In which case fare increases shall be paused.*

Vine Transit System

NVTA staff is recommending a fare adjustment to cover its rise in operating costs. NVTA last increased fares in 2015 and was planning to increase fares in 2020, but opted not to increase fares given the COVID-19 pandemic. As shown in Table 1, Vine operating costs have risen 40% over the last eight fiscal years. While operating costs decreased during the COVID-19 pandemic in Fiscal Year (FY) 19/20, by FY 21/22 expenses had risen back to FY 18/19 levels and then continued to rise. Table 1 illustrates the rise in transit expenses since 2015.

Table 1: Vine Transit Operating Costs (Millions of \$)

	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23
Transit Expenses	\$9.7	\$9.5*	\$10.7	\$10.8	\$11.3	\$11.4	\$9.7**	\$12.2	\$13.9
% Change since 2015	-	-	9.6%	10.6%	15.7%	17.4%	-%	25.6%	43%

* New contract executed

** Covid 19 pandemic year, reduction of service hours

The Vine and American Canyon Transit

NVTA is required by State law to attain a 15% farebox ratio for the Vine to receive Transportation Development Act (TDA) funds. This threshold was relaxed starting in 2020, but NVTA will once again be required to meet that ratio in 2026. This is defined as revenue obtained through means other than state and federal grants in an amount equal to 15% of the system’s operating cost.

Table 2 illustrates the farebox recovery generations compared to the increase in operating expenses and the farebox recovery ratio. In the future, if Vine Transit continues to miss the required farebox ratio target, the system is at risk of having funds withheld by the state which would likely result in service reductions.

Table 2: Transit Fund Farebox and Operating Expenses FY2015 to FY2023

	FY15	FY16	FY17	FY18
Farebox	\$1,310,234	\$ 1,231,773	\$1,247,968	\$1,330,940
Total Operating	\$ 9,731,582	\$ 9,525,784	\$ 10,665,056	\$10,763,749
Overall Increase in Operating from FY2015	-	-	9.6%	10.6%
Vine Farebox Recovery Ratio	15.03%	19.51%	18.42%	17.98%

*New contract executed

	FY19	FY20	FY21	FY22	FY23
Farebox	\$1,276,122	\$993,746	\$515,553	\$580,477	\$871,140
Total Operating	\$ 11,261,321	\$ 11,428,239	\$ 9,689,345	\$ 12,222,309	\$13,915,156
Overall Increase in Operating from FY 2015	15.7%	17.4%	-%	25.6%	43.0%
Vine Farebox Recovery Ratio	17.1%	13.41%	8.61%	8.99%	11.07%

*Covid 19 Pandemic, free fares to Sept 2021

Finally, the recommendation to raise fares aligns with Solano County and Sonoma County Transit agencies that NVRTA connects to. While Sonoma County fares remain slightly lower, they have a sales tax measure that subsidizes transit fares.

Table3: Local Cash Fare Comparisons

	Vine	Soltrans/FAST	Sonoma County Transit	Santa Rosa City Bus
Adult (19-64)	\$1.60	\$2.00	\$1.50 to \$2.10 (Zone 1 and 2)	\$1.50
Youth (6-18)	\$1.10	\$1.75	Free	Free
Senior (65+), Disabled and Medicare	\$.80	\$1.00	\$0.75 to \$1.05 (Zone 1 and 2)	0.75

The current fares were effective July 1, 2015 and proposed fare changes would take effect July 1, 2024. This, along with other local funding sources should bring Vine Transit into compliance with the farebox ratio requirement when it returns in 2026. Tables 3, 4, and 5 below outline the proposed pricing for NVRTA's pass and fare structure.

Proposed Vine Fare Tables:

Table 3: Vine Routes A-G, 10 and 11 Cash Fares and Passes

	Current Cash Fare	New Cash Fare	Current 31-Day Pass	New 31-Day Pass	Current 20-Ride Pass	New 20-Ride Pass	Current Day Pass	New Day Pass
Adult (19-64)*	\$1.60	\$2.00	\$53.00	\$55.00	\$29.00	\$30.00	\$6.50	\$7.00
Youth (6-18)	\$1.10	\$1.25	\$36.00	\$37.00	\$20.00	\$21.00	\$4.50	\$5.00
Senior (65+), Disabled and Medicare	\$.80	\$1.00	\$26.50	\$27.50	\$14.50	\$15.00	\$3.25	\$3.50

* Note that low-income riders ages 19-64 will continue to be able to apply to the Clipper START program for 50% off fares throughout the Bay Area.

Table 4: VineGo Fares

	Current Single Zone Fare	New Single Zone Fare	Current Multi Zone Fare	New Multi Zone Fare
VineGo	\$3.20	\$4.00	\$6.40	\$8.00

Table 5 Express and BART Routes 21 and 29

	Current Cash Fare	New Cash Fare	Current 31-Day Pass	New 31-Day Pass
Route 21	\$3.00	\$3.50	\$53.00	\$55.00
Route 29	\$5.50	\$6.00	\$120.00	\$125.00

There are no recommended changes to the shuttle fare structure.

ATTACHMENTS

- (1) Vine Transit Title VI Equity Analysis
- (2) Vine Fare Policy
- (3) Vine Fare Types, Current and Proposed



TITLE VI FARE EQUITY ANALYSIS

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INTRODUCTION

Title VI of the Civil Rights Act of 1964 prohibits discrimination based on race, color, or national origin in programs and activities receiving Federal financial assistance. Federal Transportation Administration (FTA) Circular 4702.1B requires FTA recipients serving populations of 200,000 or greater to evaluate any fare change and any major service change at the planning and programming stages to determine whether those changes have a discriminatory impact. FTA Circular 4702.1B does not require NVTA to perform an equity analysis, as a matter of policy Vine Transit performs equity analyses as guided by FTA Circular 4702.1B. This document is an analysis of Vine Transit's planned fare increase.

BACKGROUND

Since the last fare increase in 2015, total operational costs for the Vine Transit System have increased 43% or \$4,183,574.

By statute, the Vine, including American Canyon Transit, must collect passenger fares, advertising, and local contributions an amount equal to 15% of its operating cost. This is referred to as the farebox recovery ratio. This threshold was waived starting in 2020, but NVTA will once again be required to meet that ratio by FY2026. Over the last two fiscal years, Vine Transit has failed to reach the required farebox ratio. If TDA laws were currently being enforced, NVTA could be subject to a reduction in TDA funding and Vine Transit would have to initiate service reductions, which would result in less passengers, farebox, and additional service reductions.

Additionally, the NVTA Board of Directors in July 2014 adopted a Fare Policy which directs Vine Transit to propose a fare adjustment every three years or when operations fail to reach its required farebox ratio. The Vine and American Canyon Transit missed its obligatory 15% target in Fiscal Year 2022-2023 with a Farebox Recovery Ratio of 11.07% as well as in Fiscal Year 2023-2024 Vine Transit in its unaudited financial statement will miss the required 15% farebox ratio for the fourth consecutive year. The table below illustrates the farebox recovery generations compared to the increase in operating expenses.

Table 1: Transit Fund Farebox and Operating Expenses FY2015 to FY2023

	FY15	FY16	FY17	FY18
Farebox	\$1,310,234	\$ 1,231,773	\$1,247,968	\$1,330,940
Farebox Inc/(Dec)	-	-6.0%	1.3%	6.6%
Operating	\$11,672,743	\$11,547,760	\$13,324,993	\$13,480,279
Less Depreciation	\$(1,941,161)	\$(2,021,976)	\$(2,659,937)	\$(2,716,530)
Total Operating	\$ 9,731,582	\$ 9,525,784	\$ 10,665,056	\$10,763,749
Operating Inc/(Dec)	-	\$(205,798)	\$1,139,272	\$98,693
Percentage		-2.1%*	12.0%	0.9%
Overall Increase in Operating from FY2015	-	-	9.6%	10.6%
Vine Farebox Recovery Ratio	15.03%	19.51%	18.42%	17.98%

*New contract executed

	FY19	FY20	FY21	FY22	FY23
Farebox	\$1,276,122	\$993,746	\$515,553	\$580,477	\$871,140
Farebox Inc/(Dec)	-4.1%	-22.1%	-48.1%*	12.6%	\$50.1%
Operating	\$13,937,571	\$14,064,048	\$12,265,554	\$13,947,378	\$16,132,479
Less Depreciation	\$(2,676,250)	\$(2,635,809)	\$(2,576,209)	\$(1,725,069)	\$(2,217,323)
Total Operating	\$11,261,321	\$ 11,428,239	\$ 9,689,345	\$ 12,222,309	\$13,915,156
Operating Inc/(Dec)	\$497,572	\$166,918	\$(1,738,894)	\$2,532,964	\$1,692,847
Percentage	4.6%	1.5%	-15.2%	26.1%	13.9%
Overall Increase in Operating from FY2015	15.7%	17.4%	-0.4%	25.6%	43.0%
Vine Farebox Recovery Ratio	17.1%	13.41%	8.61%	8.99%	11.07%

*Covid 19 Pandemic, free fares to Sept 2021

July 2024 Fare Adjustments

Vine Transit is proposing an increase of between three percent (3%) and twenty-five percent (25%). Adult fares would increase to \$2.00 per ride from \$1.60. This change would result in a \$1.25 youth fare and a \$1.00 senior and disabled fare per the adopted Vine Fare Policy. The fare increase would subsequently change the pass fare structure as well in accordance with the Vine Fare Policy. This proposed fare increase would change the standard VineGo fare as well to \$3.50 for a single zone and \$7.00 for a multi zone trip. The Route 21 cash fare would go from \$3.00 to \$3.50 and Route 29 fares would go from \$5.50 to \$6.00. Additionally, the Route 11X pricing would be changed from matching the Express routes to aligning with the local routes just like the Route 11. The proposed new fares are included in Appendix 1.

TITLE VI POLICY

NVTA will ensure that its programs, policies, and activities all comply with the Department of Transportation's (DOT) Title VI regulations. The Authority is committed to creating and maintaining public transit service that is free of all forms of discrimination. NVTA will take whatever preventive, corrective, and disciplinary action necessary to address behavior that violates this policy or the rights and privileges it is designed to protect.

METHODOLOGY

Using the results of the most recently completed MTC Vine Survey in Spring 2019, NVTA staff compared the demographic information gathered about Vine riders with the 2020 Decennial Census Data and the 2022 one year and five year (2018-2022) American Community Survey data. MTC commissioned a new survey in later 2023, but it will not be completed, and the data will not be available until mid-2024. The geographical areas for the demographic data of the general population included all areas within $\frac{1}{4}$ of a bus stop when available and if that level is not available, demographic data on Napa County residents. Extrapolating from this data, staff was able to predict how the proposed fare change would affect certain populations based upon the overall service area demographics.

The Disproportionate Burden Analysis was completed by comparing the percentage of households with income under 200% of the federal poverty line. This is a standard measure in the Bay Area in determining Equity Priority Communities (previously Communities of Concern). Staff also compared the percentage of zero vehicle households as these people are more likely to be transit dependent.

EFFECTS OF PROPOSED FARE CHANGES ON MINORITY AND LOW INCOME POPULATIONS

System Wide Effects

The recommended fare change would increase the base adult fare by \$.40 from \$1.60 to \$2.00 and increase all other fare types in accordance with the Vine Fare Policy. The

increase will apply to routes A-G, 10, 11, and 11X. The routes 29 and 21 fares increase at lower rates. The total projected change in fare revenue resulting from the fare increase is approximately \$116,000.

Table 2 Rider and General Population Demographic

	Vine Ridership from MTC Survey	General Population within ¼ Mile of Transit Stops	Difference
Percent Minority Population	56%	57.5%	-1.5%
Percent of Households Under 200% of Poverty Level	54%	22.2%	31.8%
Percent of Zero Vehicle Households	40%	6.7%	33.3%

Disparate Impact Analysis

The minority population among Vine ridership is close to that of the general population at -1.5% lower than that of the general population within the affected jurisdictions. Since the minority population is slightly lower than the general population, the analysis indicates that it does not constitute a disparate impact.

Disproportionate Burden Analysis

In analyzing the percentage of households with annual income under 200% of the federal poverty level, NVTA staff found that Vine riders are much more likely than the general population to be under 200% of the federal poverty level by 31.8%. NVTA staff also analyzed the percentage of zero vehicle households and found that Vine riders, are more likely to live in households without vehicles by 33.3% compared to the general population. This is important because these riders are more likely to be transit dependent and therefore more affected by an increase in fares.

CONCLUSION

There are significantly more low income and zero vehicle households than in the general population affected by the fare changes. The results of the disproportionate burden analysis has to be balanced by the alternative solution to address the farebox problem which would be to cut service in future years. The alternative solution would likely result in greater negative impact on these transit dependent riders.

APPENDIX

Appendix 1 Proposed Fare Table

**Appendix 2 Decennial Census 2020 and American Communities
Survey 2023 5yr Data**

Appendix 1 Proposed Fare Table

	Current	Proposed	Numerical Difference	% Difference
FARES				
Adult, now including 11X	\$1.60	\$2.00	\$0.40	25%
Youth, now including 11X	\$1.10	\$1.25	\$0.15	14%
Senior/Disabled/Medicare, now including 11X	\$0.80	\$1.00	\$0.20	25%
Express (Route 21)	\$3.00	\$3.50	\$0.50	17%
BART (Route 29)	\$5.50	\$6.00	\$0.50	9%
Cash, Paratransit (One Zone)	\$3.20	\$4.00	\$0.30	9%
Cash, Paratransit (Two Zones)	\$6.40	\$8.00	\$0.60	9%
31-Day Pass, Adult	\$53.00	\$55.00	\$2.00	4%
31-Day Pass, Youth	\$36.00	\$37.00	\$1.00	3%
31-Day Pass, Senior/Disabled/Medicare	\$26.50	\$27.50	\$1.00	4%
31-Day BART	\$120.00	\$125.00	\$5.00	4%
20-Ride Pass, Adult (Local routes 10, 11 one "ride", 21 two (2) "rides", 29 three (3) "rides")	\$29.00	\$30.00	\$1.00	3%
20-Ride Pass, Youth (Local routes 10, 11 one "ride", 21 two (2) "rides", 29 three (3) "rides")	\$20.00	\$21.00	\$1.00	5%
20-Ride Pas, Senior/Disabled/Medicare (Local routes 10, 11 one "ride", 21 two (2) "rides", 29 three (3) "rides")	\$14.50	\$15.00	\$0.50	3%
Day Pass, Adult*	\$6.50	\$7.00	\$0.50	8%
Day Pass, Youth*	\$4.50	\$5.00	\$0.50	11%
Day Pass, Senior/Disabled/Medicare*	\$3.25	\$3.50	\$0.25	8%

Appendix 2 General Population within ¼ Mile of Transit Stops: Decennial Census 2020 and American Communities Survey 2022 5yr Data

	Population (Census 2020)	population	jobs (work)	% of people in poverty	% of people who are non-White or of Hispanic / Latino origin (Census 2020)	% of people who are non-White or of Hispanic / Latino origin	% of households that are car free
SYSTEM STATS	82,536	77,773	42,777	10%	57%	58%	7%
10 Up Valley Connector	21,529	20,865	18,321	8%	49%	50%	7%
11 Napa-Vallejo Connector	27,308	27,910	20,768	11%	67%	68%	9%
11X Napa-Vallejo Express	4,111	4,897	2,508	10%	60%	65%	12%
21 Napa-Solano Express	1,399	2,403	2,136	15%	70%	68%	6%
29 Napa-BART Express	4,482	5,365	2,056	6%	59%	65%	9%
A Browns Valley North Napa	14,596	14,773	8,500	7%	53%	54%	5%
Route B Westwood South Napa	15,338	14,946	7,437	11%	61%	58%	4%
Route C Jefferson Central Napa	12,707	14,494	11,288	7%	53%	52%	7%
Route D Shelter Shurtleff	6,008	5,803	2,649	12%	61%	55%	6%
Route E Vintage	17,232	16,198	8,665	8%	48%	50%	6%
Route F Southwest Napa	11,190	10,639	6,313	12%	56%	60%	5%
Route G Coombs South Napa	5,019	5,408	4,960	15%	58%	57%	7%

Appendix 2 Vine Ridership from MTC 2019 Survey

VEHICLES IN HOUSEHOLD	TOTAL	WEEKDAY			WEEKEND
		Before 10AM	Midday	After 3PM	
BASE - ALL RESPONDENTS	19,755	4,408	4,792	3,482	6,625
None	40%	31%	47%	35%	44%
One	29%	32%	26%	26%	34%
Two	17%	19%	22%	18%	6%
Three	9%	12%	2%	12%	13%
Four or more	5%	5%	3%	9%	4%
Refused	<1%	-	-	1%	-
Average Number of Vehicles	1.91	1.96	1.69	2.16	1.77

HOUSEHOLD INCOME	TOTAL	WEEKDAY			WEEKEND
		Before 10AM	Midday	After 3PM	
BASE - ALL RESPONDENTS	19,755	4,408	4,792	3,482	6,625
Below \$10,000 [\$5,000]	15%	15%	14%	13%	16%
\$10,000 to \$24,999 [\$17,499.5]	23%	23%	26%	15%	31%
\$25,000 to \$34,999 [\$29,999.5]	16%	16%	16%	22%	8%
\$35,000 to \$49,999 [\$42,499.5]	10%	8%	10%	7%	17%
\$50,000 to \$74,999 [\$62,499.5]	5%	5%	6%	5%	5%
\$75,000 to \$99,999 [\$87,499.5]	4%	6%	2%	5%	4%
\$100,000 to \$149,999 [\$124,999.5]	4%	3%	4%	5%	2%
\$150,000 or more [\$200,000]	3%	3%	3%	5%	
Don't know	16%	17%	13%	22%	13%
Refused	3%	4%	5%	1%	4%
Average Income (\$1,000)	\$39.7	\$39.6	\$39.0	\$47.8	\$30.0

ARE YOU OF HISPANIC, LATINO OR SPANISH ORIGIN	TOTAL	WEEKDAY			WEEKEND
		Before 10AM	Midday	After 3PM	
BASE - ALL RESPONDENTS	19,755	4,408	4,792	3,482	6,625
Yes	53%	42%	55%	59%	50%
No	47%	58%	44%	41%	50%
Refused	<1%	-	1%	-	-

RACE/ETHNICITY ARE YOU	TOTAL	WEEKDAY			WEEKEND
		Before 10AM	Midday	After 3PM	
BASE - ALL RESPONDENTS	19,755	4,408	4,792	3,482	6,625
Hispanic	45%	58%	41%	38%	50%
White/Caucasian	44%	32%	51%	41%	48%
Black/African American	11%	15%	7%	11%	14%
Asian	6%	5%	4%	11%	2%
American Indian/Alaska Native	4%	-	4%	9%	2%
Native Hawaiian/Pacific Islander	2%	-	1%	2%	4%
Mixed (unspecified)	1%	-	2%	3%	-
Persian/Arab/North African/Middle Eastern	<1%	2%	-	-	-
Refused	2%	2%	3%	2%	-

CHAPTER 3 PASSENGER FARES, PASSES & TRANSFERS

Section 3.1. Definitions

For the purposes of these policies, the following definitions shall apply:

Fare: The fee charged and received by NVRTA in exchange for transit services provided. The fare can be in the form of cash payment at the time of service, prepayment through other means or Clipper. Many transit fares are typically collected and recorded via an electronic recording device, known as a farebox; however, this is not the only method of collecting and recording fees. This policy may use the term fare and farebox interchangeably, and shall be interpreted as the totality of the fees.

Base Fare: For purposes of the fare policy, the base fare will be defined as the single unlinked trip, full cash fare.

Youth Fare: Fare for any rider 18 years of age and under (photo ID with proof of age required).

Child Fare: Fare for any child 5 years of age and younger.

Express Bus Route: A deluxe bus route characterized by one or more segments of high-speed, non-stop operation, and with a limited number of stops which are generally provided for commuter service.

Fare Media: Fare media shall be defined as all passes, tickets, cards or ID's sold or otherwise distributed for use on various NVRTA services.

Half-Fare: Fares, as defined above, for eligible persons with disabilities, senior riders or Medicare cardholders. The cash half fare is the maximum of one-half of the full cash fare or the current FTA guidelines (Code of Federal Regulations, Title 49, Subtitle B, Chapter Vi, Part 609), rounded down to an increment of \$0.05.

Local Bus Route: Any fixed route bus service not designated as an express or shuttle bus route.

Shuttle Bus Route: Local distribution services that operate in a small area and are used for shorter than average length trips are classified as shuttle services.

Mode: Defines the different types of services offered by NVRTA, which includes local bus, express bus, shuttle bus and Para-Transit.

Senior: Any person age 65 or older (photo ID with proof of age required at boarding).

Person with Disability: People who meet the currently enforced Federal Transit Administration's (FTA) definition of people with disabilities. At the time of the adoption of this policy, the definition is: "*any individual who, by reason of illness, injury, age, congenital malfunction, or other incapacity or temporary or permanent disability (including any individual who is a wheelchair user or has semi-ambulatory capabilities), cannot use effectively, without special facilities, planning or design, mass transportation service or a mass transportation facility.*"

Medicare Cardholders: Individuals who have been issued a Medicare card, regardless of age or disability.

Day Pass: A 24 hour period pass valid for unlimited travel on all VINE fixed route services (excluding Route 29) for one calendar day from the time of activation through the end of the service day.

Monthly Pass: A thirty (31) day period pass valid for unlimited travel on all VINE fixed route services (excluding the Route 29) for 31 calendar days from the day of activation through the end of the 31st consecutive service day.

Section 3.2. Fare Policies

Napa Valley Transportation Authority's (NVTA) Fare Policy establishes principles and polices that govern recovery of passenger revenues in support of NVTA's vision of the Vine being a customer-driven and efficient public transportation system serving the County of Napa.

3.2.1 Revenue Collection Principles

Generally, fares are required to generate revenue to offset a component part of NVTA's expenses as defined by the Transportation Development Act (TDA) as part of a sustainable long-term Financial Plan. The following principles guide establishment and management of NVTA's fare revenue collections:

- A. Promote ridership on all transit related services: NVTA seeks to encourage and facilitate transit ridership within VINE's service area. Vine's fares shall; therefore, be devised to be attractive to the widest possible range of existing and potential rider groups.
- B. Equitable fares: To be equitable, fares must take into account the needs of Vine's riders as well as the cost and value of the service provided by the Vine. Vine's fares shall support the travel patterns and requirements of transit riders throughout the service area and shall also reflect differences in the characteristics and frequency of the service provided, while not undervaluing Vine's service.
- C. Enhance mobility & access: Vine fares shall enhance the ability of riders to access the system and move through it with ease. To do so, Vine fares shall be easy to understand and shall promote a unified system by simplifying and, where effective and possible, unifying fares across services.
- D. Effective & cost efficient: Vine's fare pricing, fare policy, fare media distribution channels, and fare collection technologies shall be developed and operated to be easily applied by transit operating employees, as well as to minimize the costs associated with fare collection, fare media distribution and revenue processing.
- E. Management: Vine's fares and fare collection system shall be designed to facilitate data collection to foster analytical decision making by NVTA's staff.

In keeping with these principles, the policies governing Vine's fares are set forth below:

- A. **Farebox Recovery:** Vine collects fares from passengers riding its transit services as one element of funding these services. These fares are then used to offset the costs of providing the transit service, otherwise known as Farebox Recovery. The Farebox Recovery ratio is defined as the ratio of the transit fares to the operating costs. NVTA's farebox recovery ratio target shall be equal to those targets set forth by Transit Development Act regulations. Urban transit services, Vine and American Canyon Transit, have a farebox recovery target different than that of rural transit (Calistoga Shuttle, St. Helena Shuttle and Yountville Trolley) and ADA Paratransit services. See note D at the end of this document for current regulatory farebox recovery rates.
- B. **Vine Fare Adjustments:** Fare adjustments are defined as any permanent changes to Vine's fare structure. Decisions on fare adjustments are made by the NVTA's Board of Directors. Prior to making a decision on a fare adjustment, the Board shall consider the recommendation by NVTA's staff, including but not limited to an analysis of the impacts on minorities and low-income individuals consistent with Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d et seq), the Federal Transit Administration (FTA) Title VI regulations (49 CFR part 21), and FTA's Circular 4702.1B, including any future amendments thereto, as well as NVTA's Title VI Policy. Prior to raising a fare, NVTA shall solicit and consider public comment in compliance with 49 USC Chapter 53 and FTA Circular 9030.1C, including any future amendments thereto. Implementation of a fare adjustment shall occur no earlier than 30 days and no later than 12 months following approval by the Board of Directors. Any change in the fare shall be rounded to the nearest \$.05.

Fare adjustments shall be considered by the NVTA Board under the following scenarios:

1. Following NVTA's annual report if VINE has failed to meet its farebox ratio goal defined in the fare policy.
2. Every three years the NVTA Board of Directors will consider fare adjustments to match the previous three years of CPI-U for the San Francisco – Oakland – San Jose Region or to match the percent increase in Vine expenditures for the previous three years whichever is greater. Unless the farebox ratio for the previous fiscal year is equal to or greater than 20%. In which case fare increases shall be paused.

NVTA staff will annually report to the Board a review of farebox revenues and the farebox recovery ratio for the entire system and service. NVTA staff will recommend possible

solutions for meeting the minimum farebox recovery if analysis indicates it has not been met. Solutions may include a recommendation for a fare adjustment. Such recommendation will include consideration of economic trends, Vine's current and future operating health and the value of services, both qualitative and quantitative, in the communities served.

- C. Fare Differentials:** Vine's fares shall balance simplicity and uniformity of fares with the equity of pricing services consistent with the cost and value of providing that service. The number of fare types, levels, and fare payment instruments shall consider the ease of enforcement by vehicle operators, ease of understanding by customers and the ease of tracking with both the farebox technology and the back-office technology.

Services that cost more to operate or provide additional value to passengers compared with local bus service are considered premium services, and may be priced higher (but never lower) than local bus service. Premium services include express buses, paratransit, and if implemented in the future, bus rapid transit. The price structure for each premium service will be set separately.

Local distribution services that operate in a small area and are used for shorter than average length trips provide less value to riders and are classified as shuttle services. Shuttle services may be priced equal to or lower than local bus service.

- D. Vine-GO Paratransit Fares:** Vine Go's policy, in compliance with the Americans with Disabilities Act of 1990 (42 U.S.C. Section 12143) and the implementing FTA Regulations (49 CFR Section 37.121) is that ADA complementary paratransit fares will equal twice the regular fixed-route fare for the same trip. If the Act is changed, this policy shall be changed to be consistent with federal law. If ADA complementary paratransit provides service beyond or in addition to the federally defined ADA complementary paratransit service, a higher fare shall be charged for that service.

- E. Vine Local Passes:** Prepayment of fares on the fixed-route system shall be encouraged. Monthly local Vine passes shall be discounted to provide some savings to commuters compared with the cash fare, but not less than 30 (See Attachment A) times the cash fare. Day passes shall be priced at least equivalent to the cost of three boardings and no more than the cost of six boardings. Twenty ride passes shall provide the equivalent of 20 rides and shall be discounted no more than 10% (See Attachment A) from the actual value. These policies shall be applied equitably across all fare types (Adult, Youth and Discount). Passes shall be priced to expedite the

local VINE service do not apply to the Route 21. The Route 21 does not have a distinct monthly pass but all other passes are valid for use on the Route 21. In the case of a punch pass one ride shall be equal to two punches. Transfers are accepted onto the Route 21 from any other VINE route.

- G. **Local Shuttle Services:** Local shuttle service fares (St. Helena, Yountville, Calistoga and American Canyon) are defined by the individual Agreements between the jurisdiction and NVTA. These shuttle services are not subject to any provision stated in the Fare Policy except those required by law and defined within the relevant Agreement.
- H. **Promotions and Special Events:** Fare promotions, including special event fares, may be used to attract riders to Vine services. Fare promotions can be a cost-effective method of attracting riders to new services (such as new bus routes) and existing services. For the purpose of this policy, Fare Promotions shall be defined as any new fare card, fare media, cash fare or other transit fare which is not part of the adopted fare structure and may be priced higher or lower than Vine's regular fares. Fare Promotions are not required to include a specific fare for seniors, Medicare cardholders or individuals with disabilities, however the rates charged seniors, Medicare cardholders or individuals with disabilities during off-peak hours must not exceed one-half of the rates generally applicable to other persons at peak hours (excluding the Fare Promotion) as required by FTA regulations (Code of Federal Regulations, Title 49, Subtitle B, Chapter Vi, Part 609). Fare promotions must be able to be implemented within the capabilities of the current fare collection technology in use at the time of the implementation. Fare promotions shall not exceed a six (6) month period. If the promotion is deemed to be successful and management desires it to be part of the fare structure, then management shall bring the issue and analysis to the Board of Directors for adoption into the current fare structure. Should the fare promotion result in "free rides". Pass holders with a 31-day pass activated before the beginning of the promotion and valid during the period of the promotion shall receive a period pass equal to the free period. To remain equitable all paratransit service shall be free during free ride promotions
- I. **New Payment:** Options Fare payment options that effectively attract a different market segment or encourage increased use of Vine services by current riders shall be developed; but must be within the realm of current or planned hardware, software and back-office technologies. Initial pricing for such options shall be set such that VINE is not expected to lose fare revenue, unless the Board of Directors specifically approves an estimated amount of lost revenue.
- J. **Design:** The design of fare payment instruments shall consider the

ease of enforcement by bus operators, ease of understanding by customers and the ease of tracking with both the farebox technology and the back-office technology.

- K. **Child and Youth Fares - Vine Local Route Services:** Up to two children, 5 years of age or less, ride free with each adult over 18 paying fare. Additional children must pay \$.50 per child. No child under the age of seven may ride without an accompanying adult.

Youth shall be defined as persons ages 6 - 18. Youth may qualify for a reduced fare based on the type of service being provided and the publicized fare. Youth fare is calculated by subtracting \$.50 from the full adult fare. In all cases, the youth will no longer qualify for any youth discounts on his/her 19th birthday.

- L. **Half-Fare Program – Vine Local Fixed Route Services:** The objective of the Half-Fare Program is to provide reduced fares for fixed route services for seniors, persons with disabilities and Medicare cardholders in compliance with the Federal Transit Administration’s half-fare requirements (Code of Federal Regulations, Title 49, Subtitle B, Chapter Vi, Part 609).

Who is eligible for the half-fare program?

1. Persons aged 65 and older, unless the FTA regulations defining seniors are changed in the future, in which case the FTA regulations shall be followed.
2. Medicare cardholders
3. People who meet the currently enforced Federal Transit Administration’s (FTA) definition of people with disabilities. At the time of the adoption of this policy, the definition is: “*any individual who, by reason of illness, injury, age, congenital malfunction, or other incapacity or temporary or permanent disability (including any individual who is a wheelchair user or has semi-ambulatory capabilities), cannot use effectively, without special facilities, planning or design, mass transportation service or a mass transportation facility.*”

NOTES

- A. The local monthly pass multiplier is based on an analysis of other local transit services within the Bay Area and what is currently being used by the Vine. See Attachment A.
- B. The discount for the punch pass is based on an analysis of other local transit services within the Bay Area and what the VINE is currently using. See Attachment A.
- C. The Route 29 monthly pass multiplier is based on an analysis of other express route services within the Bay Area and what is currently being used by the Vine. See Attachment B.
- D. As of June 1, 2014 the regulatory minimum farebox recovery ratio is 16% for urban transit services and 10% for rural and ADA paratransit services.
- E. Vine offers reduced fares to senior citizens and disabled persons. The Vine honors the federal Medicare identification card, the California Department of Motor Vehicles disability ID card, the Regional Transit Connection Discount Card, or any other current identification card issued by another transit operator that is valid for the type of transportation service or discount requested; and when offering reduced fares to senior citizens, it also offers the same reduced fare to disabled patrons.

**ATTACHMENT 3
PCC AGENDA ITEM 8.1
January 11, 2024**

Vine Transit Fares				
Fare Type	Current	Proposed	Numerical \$	Percentage %
Adult, now including 11X	\$1.60	\$2.00	\$0.40	25%
Youth, now including 11X	\$1.10	\$1.25	\$0.15	14%
Senior/Disabled/Medicare, now including 11X	\$0.80	\$1.00	\$0.20	25%
Express (Route 21)	\$3.00	\$3.50	\$0.50	17%
BART (Route 29)	\$5.50	\$6.00	\$0.50	9%
Cash, Paratransit (One Zone)	\$3.20	\$4.00	\$0.80	25%
Cash, Paratransit (Two Zones)	\$6.40	\$8.00	\$1.60	25%
31-Day Pass, Adult	\$53.00	\$55.00	\$2.00	4%
31-Day Pass, Youth	\$36.00	\$37.00	\$1.00	3%
31-Day Pass, Senior/Disabled/Medicare	\$26.50	\$27.50	\$1.00	4%
31-Day BART	\$120.00	\$125.00	\$5.00	4%
20-Ride Pass, Adult (Local routes 10, 11 one "ride", 21 two(2) "rides", 29 three (3) "rides")	\$29.00	\$30.00	\$1.00	3%
20-Ride Pass, Youth (Local routes 10, 11 one "ride", 21 two(2) "rides", 29 three (3) "rides")	\$20.00	\$21.00	\$1.00	5%
20-Ride Pas, Senior/Disabled/Medicare (Local routes 10, 11 one "ride", 21 two (2) "rides", 29 three (3) "rides")	\$14.50	\$15.00	\$0.50	3%
Day Pass, Adult*	\$6.50	\$7.00	\$0.50	8%
Day Pass, Youth*	\$4.50	\$5.00	\$0.50	11%
Day Pass, Senior/Disabled/Medicare*	\$3.25	\$3.50	\$0.25	8%

*Not Valid on Route 29



NAPA VALLEY TRANSPORTATION AUTHORITY

PCC Agenda Letter

TO: Paratransit Coordinating Council (PCC)
FROM: Kate Miller, Executive Director
REPORT BY: Rebecca Schenck, Program Manager – Public Transit
 (707) 259-8636 / Email: rschenck@nvta.ca.gov
SUBJECT: Paratransit Eligibility Standardization

RECOMMENDATION

That the Paratransit Coordinating Council (PCC) review and recommend that the Napa Valley Transportation Authority (NVTA) Board update NVTA’s Transit Policies for paratransit service to 1) add a medical verification and phone interview to the eligibility determination process and 2) standardize the renewal timeline for eligibility to five (5) years in conjunction with all other Bay Area paratransit providers at its February 21, 2024 meeting.

EXECUTIVE SUMMARY

Action 25 of the Bay Area Transit Transformation Action Plan (“Action Plan”) requires that “standardized eligibility practices for programs that benefit people with disabilities (ADA paratransit)” be established for the Bay Area. After documenting current practices and nationwide best practices, the Metropolitan Transportation Commission (MTC) drafted recommendations cooperatively with the Bay Area Partnership Accessibility Committee, a working group of representatives from Bay Area transit agencies. The recommendations span options for incremental improvements toward developing a centralized process that integrates most, if not all, eligibility functions into one system for the entire region. To adhere with the other Bay Area paratransit providers on the first two Tier 1 recommendations, NVTA staff is recommending that the Transit Policies be updated to 1) add a medical verification and phone interview to the eligibility determination process and 2) standardize the renewal timeline for eligibility to five (5) years.

FISCAL IMPACT

Is there a Fiscal Impact? No.

BACKGROUND

The first two Tier I Recommendations in the Bay Area ADA Paratransit Eligibility Recommendations released by MTC are as follows:

1. Implement new standard application forms available online

Agencies will use standard application forms: 1) a short form to be used in conjunction with in-person transit skills assessments, and 2) a longer form to be used in conjunction with medical verifications and phone interviews. Each agency will post their application and other paratransit information on their website. To meet Title VI requirements, translated versions of the application and related essential documents will also be posted on transit agency websites.

2. Standardize renewal timelines for eligibility to five (5) years

Agencies will increase the eligibility for both permanent eligibility and auto-renewals from three years to five years.

Below is a brief summary of the changes to the Transit Policies and Procedures that need to occur to align with these Tier I recommendations.

1. 'Implement new standard application forms available online'

NVTA already offers their application online and since COVID they have been using a long form application and phone interview. The one item NVTA is not currently doing is an additional medical verification, however, NVTA's eligibility consultant ADA Ride has this capability and has a standard form included as Attachment 2.

2. 'Standardize renewal timelines for eligibility to five (5) years'

This item is straightforward and involves increasing unconditional and conditional eligibility from three (3) years to five (5) years. Redline changes can be found in Attachment 1.

ATTACHMENTS

- 1) Chapter 5: ADA Paratransit Policies from NVTA Policies, Practices and Procedures Manual Transit Policies
- 2) Medical Verification Form
- 3) Action: 25 Bay Area ADA Paratransit Eligibility Standardization Draft Recommendations

NVTA POLICIES, PRACTICES, AND PROCEDURES MANUAL
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TRANSIT POLICIES

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CHAPTER 5 ADA PARATRANSIT POLICIES

Section 5.1. Service Overview

Section 5.2. NVTA Eligibility Standards In compliance with the American’s with Disabilities Act (ADA) of 1990 the Napa Valley Transportation Authority (NVTA) provides complementary paratransit service (Vine Go) to the Vine fixed route bus system. This service is available to all individuals deemed eligible that are making a trip with an origin and destination within three-quarters (¾) of a mile of a Vine fixed route corridor. Vine Go paratransit operates as a curb-to-curb service.

Per the ADA regulations individuals falling into one or more of the below categories are eligible to receive complementary ADA paratransit service:

Category 1: Any individual with a disability who is unable, as the result of a physical or mental impairment (including a vision impairment), and without the assistance of another individual (except the operator of a wheelchair lift or other boarding assistance device), to board, ride, or disembark from any vehicle on the fixed route system which is readily accessible to and usable individuals with disabilities.

Category 2: Any individual with a disability who needs the assistance of a wheelchair lift or other boarding assistance device and is able, with such

assistance, to board, ride and disembark from any fixed route vehicle which is readily accessible to and usable by individuals with disabilities if the individual wants to travel on a route on the system during the hours of operation of the system at a time, or within a reasonable period of such time, when such a vehicle is not being used to provide designated public transportation on the route.

Category 3: Any individual with a disability who has a specific impairment-related condition which prevents such individual from traveling to a boarding location or from a disembarking location on such system.

- Under this condition an emphasis is placed on prevents. A condition which makes traveling to boarding location or from a disembarking location more difficult for a person with a specific impairment-related condition than for an individual who does not have the condition, but does not prevent the travel, is not a basis for eligibility.
- Architectural barriers not under the control of the public entity providing fixed route service and environmental barriers (e.g., distance, terrain, weather) do not, standing alone, form a basis for eligibility under this paragraph. The interaction of such barriers with an individual's specific impairment-related condition may form a basis for eligibility under this standard, if the effect is to prevent the individual from traveling to a boarding location or from a disembarking location

Section 5.3. Eligibility Determination Process

Individuals wishing to apply for ADA paratransit service must complete an application in conjunction with a medical verification and phone interview. All decisions regarding an applicant's eligibility shall be rendered in written form within twenty-one (21) days of receiving the applicant's determination form regardless of any follow up.

Section 5.4. Eligibility Categories

NVTA separates eligible individuals into three distinct categories: unconditional, conditional, and temporary. Unconditional eligibility is assigned to individuals who are unable to use fixed route transit under any circumstances. Conditional eligibility is assigned to individuals who are able to independently use fixed route transit under some circumstances. Those "circumstances" are determined at the time of an applicant's evaluation and are then adhered to when scheduling rides. Temporary eligibility is assigned to individuals who experience a temporary loss of functional ability that prevents them from using fixed route service. Each eligibility category shall result in differing terms regarding the span of time in which an individual is certified to use ADA paratransit. Individuals deemed unconditional shall remain eligible indefinitely due to the fact most disabilities that would result in this type of categorization do not improve with time. Unconditional individuals will receive a letter every five (5) years to ensure the most up to date information is on record. Conditionally eligible individuals shall remain certified for a period of five (5) years. Prior to their expiration conditionally eligible individuals will be sent a letter asking to renew as well as a new application. The determination of eligibility

may change during their renewal, should their disability either improved or deteriorated. Temporarily eligible individuals will also be sent a letter and application at the end of their term giving them the opportunity to renew should they feel that their condition still prevents them from riding fixed route transit.

Section 5.5. Appeals Process

If a paratransit applicant is deemed ineligible and does not agree with the determination they have the right to appeal the decision. To formally appeal a decision a letter must be submitted to NVTA within 60 days of receiving an eligibility determination letter. The letter shall be addressed to NVTA 625 Burnell St. Napa, CA 94559 to the attention of the Manager of Public Transit. Upon receiving the letter an appeals panel will be assembled to hear an applicant's appeal. The applicant or someone they appoint to speak on their behalf shall be contacted and an in person meeting with the panel will be scheduled. The panel shall consist of a member of Napa County's Paratransit Coordinating Council (PCC), a member of NVTA's Evaluation Contractor's evaluation staff, and the Manager of Public Transit or his/her designated staff member. The appeals panel will render a final written decision within thirty (30) days of hearing the appeal. Should the appeals panel not render a decision within the thirty (30) days after the completion of the appeals process, NVTA shall provide paratransit service to the applicant until a decision is rendered. Free transportation shall be provided to the appealing applicant and their personal care attendant (PCA) to the appeals hearing.

Section 5.6. Visitors

Complementary paratransit service is available to visitors. A visitor is defined as anyone coming from an area outside of the nine (9) Bay Area Counties. All visitors must submit a proof of eligibility as determined by the jurisdiction in which they formally reside prior to their use of the Vine Go system. In a case where an individual has no formal documentation of ADA eligibility, the individual is to provide documentation of residence outside of the Bay Area, and if the individual's disability is not apparent, proof of disability. Visitors shall be able to use Vine Go for a total of twenty-one (21) days within a three hundred and sixty-five (365) day period. Should an individual need service beyond the twenty-one (21) total days they shall be required to apply for local certification.

Section 5.7. Reservation and Scheduling

Eligible individuals may schedule their trips as early as seven (7) days in advance or as late as the day before the intended trip. For clarification, the "day before" is not considered to be twenty-four (24) hours prior to the intended trip. A request for a morning trip can be made in the afternoon of the day before. Trips are scheduled on a first come, first serve basis. No trips will be given priority over the other based on trip purpose or destination. Reservationist may negotiate an eligible individual's requested pickup time up to one hour before or after the desired pickup time. Reservationists shall be available to schedule trips from 8:00AM to 6:00PM, Monday through Friday and 8:00AM to 5:00PM Saturday through Sunday. NVTA does not provide subscription service.

Section 5.8. Hours of Operation and Service Area

NVTA shall operate complementary paratransit service during the same days and hours that fixed route service operates. Thus, if an individual can travel from a given origin to a given destination on a particular fixed route at a certain time of day, a paratransit eligible person must also be able to travel from the same origin to that same destination on paratransit at that time of day. Because paratransit service is required to be available during the same hours and days as the fixed route system, and because not all fixed routes will necessarily be operating at a given time on a given day, the shape of the paratransit service area can be expected to change accordingly. For example, it is common for certain routes to not run late at night or on Sundays. Those routes, and their associated paratransit corridors, are not served with paratransit when the fixed route system is not running on them.

Section 5.9. Fares

NVTA shall set its fares for paratransit trips at twice that of a comparable fixed route trip. Eligible individuals shall pay their fare upon boarding. Personal care attendants (PCA) that are specifically identified in an eligible individual's file ride for free. Should an eligible individual have a companion that is not their designated PCA, that individual shall be required to pay the same fare amount as the eligible individual they are travelling with.

Section 5.10. Mobility Devices

Vine and Vine Go transit vehicles are designed to accommodate most wheelchairs and mobility aids. NVTA defines a wheelchair as a mobility aid that belongs to any class of three or more wheeled devices, is manual or powered, usable indoors and/or outdoors, and designed or modified for the an individual's mobility impairments. The maximum amount that a lift on the fixed route system can safely accommodate is 600lbs (rider and mobility device combined). Some ramp equipped fixed route vehicles can accommodate 800lbs however there is no guarantee that those specific vehicles will be available for one's trip. For safety reasons riders and their mobility device that have a combined weight of 600lbs or more are encouraged to use paratransit. The maximum the lifts on NVTA's paratransit fleet can safely accommodate is 800lbs. If the combined weight of a rider and their mobility device is 800lbs or greater Vine Go cannot accommodate them safely and the rider will be directed to make other transportation arrangements.

Section 5.11. Passenger Accompaniment

NVTA guarantees any eligible paratransit user one travel companion. Additional persons accompanying eligible individuals are to be served on a space-available basis to prevent displacement of other ADA paratransit eligible individuals. NVTA does not limit who the companion may be; the companion may be a family member, friend, or business associate, etc. NVTA requires that the eligible individual reserve a space for the companion when reserving his or her own ride. A personal care attendant (PCA), someone designated or employed to assist the eligible individual, may always ride with the eligible individual. If there is a PCA on

the trip, the eligible individual may still bring a companion, as well as additional companions on a space-available basis. To be considered as “accompanying” the eligible individual, a companion must have the same origin and destination points as the eligible individual.

NVTA allows service animals to accompany paratransit users on all trips. A service animal is defined by the ADA as “any guide dog, signal dog, or other animal individually trained to work or perform tasks for an individual with a disability, including, but not limited to, guiding individuals with impaired vision, alerting individuals with impaired hearing to intruders or sounds, providing minimal protection or rescue work, pulling a wheelchair, or fetching dropped items.” Emotional support, therapy, comfort, or companion animals are not considered “service animals” as they have not been trained to perform a specific job or task. Operational staff may ask if an animal is a service animal or ask what tasks the animal has been trained to perform in cases where it is not obvious that an animal is a service animal. NVTA shall not require the exclusion of a service animal unless the animal is out of control and the animal's owner does not take effective action to control it or the animal poses a direct threat to the health or safety of others. NVTA does not limit the number of service animals accompanying a user as long as each animal meets the definition of a service animal and is kept under the control of the rider.

Section 5.12. Passenger Assistance

As defined in Section I of these policies NVTA’s ADA paratransit shall operate as a curb-to-curb service. Drivers will provide assistance beyond the curb on an as-needed basis. NVTA shall ask users upon requesting their ride to inform the reservationist if this aid is needed for their pickup and/or drop-off. Should a user not inform the reservationist or a barrier becomes present that was unknown creating the requirement of assistance from the driver, assistance shall not be denied. Although assistance beyond the curb shall be provided on a case by case basis it is NVTA policy that drivers are able to maintain “effective continuing control” of the vehicle. Effective continuing control is defined by the NVTA as the driver being able to maintain visual contact with the vehicle at all times in cases where a user needs assistance beyond the curb. Drivers are also prohibited to enter private residences or past the first exterior door of any other building even if visual contact with the vehicle can be maintained.

Section 5.13. No-Shows

A no-show is defined as a situation where a rider does not take a scheduled ride or cancels their trip an hour or less before their scheduled pickup time due to reasons within their control. Trips missed due to sudden illness, family emergency, or transit agency error or lateness considered outside of the rider’s control are not considered a “no-show”. A no-show often results in a wasted trip that could have otherwise been given to someone else. Due to critical nature of paratransit trips NVTA takes chronic no-shows very seriously. ADA regulations allow paratransit service to be suspended for a reasonable amount of time when a rider consistently does not appear for scheduled trips. Missing three (3) trips or 10% or more of a

passenger's total trips in a calendar month is considered chronic no-show behavior. If a rider presents chronic no-show behavior he or she will be provided with written notification of their impending suspension and the degree of their penalty. The penalties are described below:

- 1st month – Passenger will receive a phone call and a letter to review the policy and rider expectations.
- 2nd month – Seven (7) day suspension
- 3rd month – Fourteen (14) day suspension
- 4th month and after – increasing penalties by one (1) week up to one (1) month suspension.
- Penalties will reset after a year period from the first warning letter.

At any point that an individual receives a written warning or impending suspension notice they may appeal the suspension within sixty (60) days of receipt. The appeals panel will render a final written decision within thirty (30) days of receiving the appeal.

Section 5.14. Pick-Ups

NVTA requests that riders be ready for pick-up at their scheduled time. Drivers shall wait five (5) minutes past the scheduled pick-up time for a registrant to make an indication they are present and planning to make their trip. If a registrant does not show themselves or make a good faith effort they to inform the driver they are making their way to the vehicle the driver will depart and the registrant will be considered a no-show. This five (5) minute window shall commence from the scheduled time of pick-up, not when the vehicle arrives. If a driver arrives prior to the scheduled pick-up they cannot commence the countdown until the scheduled pick-up time. Should a driver arrive early there is no obligation for the registrant to board the vehicle. Although there is no obligation a registrant may elect to depart early, and the trip will be considered early. A trip is considered “on-time” when a vehicle arrives within thirty (30) minutes of the scheduled pick-up time. If the vehicle arrives outside of the thirty (30) minute window they are considered late. To ensure a high quality of service NVTA expects that 90% of pick-ups are either on-time (within the 30-minute window) or are early.

Section 5.15. Denials and Missed Trips

NVTA shall have no denials of service. NVTA's operator shall make it a top priority to provide enough capacity on the system to meet demand. Missed trips are trips that are not completed due to agency error. They shall be defined as follows.

- The vehicle arrives and leaves before the beginning of the pickup window without picking up the rider and without any indication from the rider that he or she no longer wants to make the trip. Note that a rider is not obligated to board until the beginning of the pickup window or—for transit agencies that have a 5-minute wait-time policy—from the start of the pickup window until 5 minutes have elapsed.
- The vehicle does not wait the required time within the pickup window, there is no contact with the rider, and the vehicle departs without the rider. Note that if during the wait time the rider indicates he or she no longer wants to take the trip, this is typically recorded as a “cancel at the door.”

- The vehicle arrives after the end of the pickup window and departs without picking up the rider (either because the rider is not there or declines to take the trip because it is now late).
- The vehicle does not arrive at the pickup location.

Section 5.16. Trip Length

NVTA shall sample twenty (20) random weekday trips, five (5) Saturday trips, and three (3) Sunday trips on a monthly basis to ensure that travel times are comparable to the travel times an individual would have on a comparable fixed route trip. NVTA expects trips to be comparable 95% of the time.

Section 5.17. Equivalent Service

NVTA operates four on-demand shuttle services in the communities of Calistoga, St. Helena, Yountville, and American Canyon. These on-demand services shall operate as complementary ADA paratransit for all trips originating and ending within their respective service areas. To ensure equitable service NVTA shall ensure that response times, fare, geographic service area, hours/days of operation, restrictions, availability of information and reservation capability, and constraints on capacity or availability are equal between ADA and non-ADA eligible riders of each on-demand shuttle service.

APPLICANT NAME:

DOB:



HEALTHCARE PROFESSIONAL VERIFICATION
FOR PROFESSIONAL USE ONLY

ATTENTION PROFESSIONALS COMPLETING THIS FORM

Your client/patient is applying for the Americans with Disabilities Act Paratransit service. The criterion used for determining eligibility is based on one's functional ability to independently use accessible public transportation (bus and rail). There are physical, mental, visual skills required to access public buses and hopefully you can help document your client's / patient's abilities. Keep in mind that public buses are equipped with ramps and lifts thus eliminating the need to negotiate stairs. Public buses offer additional accessibility features like priority seating for seniors and people with disabilities, driver assistance on and off the bus, etc. Your client/patient must have this form completed by a healthcare professional in order to complete their application as we are required by law to complete this process in 21 days. Your participation is vital as incomplete applications will be deemed ineligible and your client / patient will not be able to use the ADA paratransit service. We value your input and respectfully request a response ASAP.

The information shared will be protected per the requirements identified in the Health Insurance Portability and Accountability Act (HIPAA) and your patient/client has agreed to allow NFTA and it's eligibility contractor, ADARIDE.COM to contact you for this information via the application. Your cooperation and assistance is greatly appreciated. If you have any questions or comments please do not hesitate to contact us @ 1-877-232-7433

www.adaride.com you can complete this form online by calling our Toll Free number to obtain the secure application ID number and password.

If any falsification of information is determined in the application / verification, it may result in immediate suspension or termination of your client's paratransit services. It also may be prosecuted to the fullest extent of the law. Your cooperation is greatly appreciated This form must be completed by one of the following: Physician / MD / DO, Registered or licensed nurse, physical therapist / assistant, occupational therapist / assistant, psychologist, psychiatrist, podiatrist, audiologist, ophthalmologist, rehabilitation specialist, clinical social worker / MFCC Orientation and Mobility Instructor, Special Education Teacher .

ADDRESS / FAX / EMAIL

Please forward both COMPLETED forms to:
ADARIDE 19300 S. HAMILTON AVE SUITE #120 GARDENA, CA 90248
or FAX to: (310) 410-0239
or Email to: info@adaride.com

Your professional information

First name: _____ Middle name: _____
Last name: _____ Professional license#: _____
Profession: _____ E-mail address: _____
Day phone: [] [] [] - [] [] [] - [] [] [] [] Mobile phone: [] [] [] - [] [] [] - [] [] [] []

Address

Street#: _____ Street: _____ Apt#: _____
City: _____ State: _____

1. Please list the diagnosis you are treating your client / patient for and any other diagnosis that your client may have

2. Please indicate which of the following category most limits your client/patient.

You can check more than one category if both disabilities limit your client's/patient's independence and mobility.

- Mental
- Physical
- Visual

If you have chosen Physical , please choose categories:

- Cardio vascular
- Organ failure / transplant / diabetes

- | | |
|---|--|
| <input type="checkbox"/> Gastrointestinal disorders | <input type="checkbox"/> Orthopedic conditions |
| <input type="checkbox"/> Geriatric disorders | <input type="checkbox"/> Other |
| <input type="checkbox"/> Infectious diseases / immunology | <input type="checkbox"/> Pediatric disorders |
| <input type="checkbox"/> Neurologic disorders | <input type="checkbox"/> Pulmonary disorders |
| <input type="checkbox"/> Oncology and hematology | |

3. Which statement best describes your patient's condition?

- | | | |
|--|---|--|
| <input type="checkbox"/> Being treated and hopes to improve | <input type="checkbox"/> Permanent condition that is not expected to change | <input type="checkbox"/> Disease is advanced and considered terminal |
| <input type="checkbox"/> Condition should not interfere with independent bus usage | <input type="checkbox"/> None of the above | |

4. Prognosis

5. Treatment plan with start date and anticipated completion date

6. Have you ever prescribed or are you aware of device your client / patient currently uses?

- | | | |
|--|--|---|
| <input type="checkbox"/> None | <input type="checkbox"/> Cane | <input type="checkbox"/> Power Wheelchair |
| <input type="checkbox"/> Crutches | <input type="checkbox"/> Manual Wheelchair | <input type="checkbox"/> Scooter |
| <input type="checkbox"/> White Cane | <input type="checkbox"/> Walker | <input type="checkbox"/> Leg Braces |
| <input type="checkbox"/> Portable Oxygen | <input type="checkbox"/> Service Animal | <input type="checkbox"/> Prosthesis |
| <input type="checkbox"/> Folding Walker | | |

APPLICANT NAME:

DOB:

APPLICANT NAME:

DOB:

7. Are your client's / patient's symptoms episodic?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

8. Are you aware of any challenges your client / patient has with balance?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

9. Are you aware of any challenges your client / patient has with strength and endurance?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

10. Do you think your patient/client could independently ambulate / wheel 3/4 of mile (about nine blocks with a mobility device and brief rest periods if needed)?

Yes

No

Sometimes

Do not know

If you have chosen No/Sometimes, please elaborate:

11. Are you aware of any challenges your client / patient has with memory?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

12. Are you aware of any challenges your client / patient has with crossing streets?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

13. Are you aware of any challenges your client / patient has with ambulating on hills?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

14. Do you have any safety concerns for your client / patient in using a bus by themselves (e.g. panic attacks, cognitive deficits, risk of falling etc)?

Yes

No

Sometimes

Do not know

If you have chosen Yes/Sometimes, please elaborate:

15. Are you aware of any visual impairment that may challenge your client / patient in using the city bus?

Yes
 Do not know

No

Sometimes

If you have chosen Yes/Sometimes, please elaborate:

16. Are you aware of any hearing impairment that may challenge your client / patient in using the city bus?

Yes
 Do not know

No

Sometimes

If you have chosen Yes/Sometimes, please elaborate:

17. Do you have any additional comments that may help document your client's/patient's abilities/challenges in using a city bus?

Yes
 Do not know

No

Sometimes

If you have chosen Yes/Sometimes, please elaborate:

18. I understand the purpose of this application is to determine if there are times when the applicant cannot use NVTA city bus service and may therefore require the VineGo program for public transportation needs. I certify that, to the best of my knowledge, the information in this application is true and correct regarding my client/patient. I understand that providing false information may result in penalty under the law.

19. PROFESSIONAL SIGNATURE _____

20. TITLE / CREDENTIALS _____

APPLICANT NAME:

DOB:

Action 25: Bay Area ADA Paratransit Eligibility Standardization Draft Recommendations

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Executive Summary

Action 25 of the Bay Area Transit Transformation Action Plan (“Action Plan”) requires that “standardized eligibility practices for programs that benefit people with disabilities (ADA paratransit)” be established for the Bay Area. As a first step towards implementation of this task, information was gathered about (1) current eligibility practices conducted by ADA paratransit programs throughout the Bay Area, and (2) nationwide standards and best practices for determining ADA paratransit eligibility. After documenting current practices and nationwide best practices, draft recommendations were developed cooperatively with the Bay Area Partnership Accessibility Committee, a working group of representatives from Bay Area transit agencies. Draft recommendations span options from incremental improvements (recommendations for each transit agency) towards developing a centralized process that integrates most, if not all, eligibility functions into one system for the entire region. It is fully recognized that due to a variety of factors, the Bay Area may never achieve a fully integrate regional eligibility system. However, this list of draft recommendations was developed to bring the region’s transit agencies closer to having one standard process for determining ADA eligibility and are aimed at improving eligibility accuracy and efficiency for each individual transit agency. This document outlines those draft recommendations and provides materials such as a sample eligibility decisions trees and a sample phone interview protocol, to assist agencies as they improve their eligibility practices and meet regional goals.

Tier 1 Recommendations

To enhance accessibility and to streamline the application and renewal process for ADA paratransit services, the following set of recommendations was developed cooperatively with the Bay Area Partnership Accessibility Committee (BAPAC), a working group of representatives from Bay Area transit agencies. From adopting standardized online application forms, extending eligibility renewal timelines, expanding intake call inquiries and promoting travel training, **Tier 1 initiatives are intended to create a more efficient, user-friendly, and consistent paratransit eligibility process.** Tier 1 recommendations, in the table below, are goals with short-term horizons that require fewer resources than long-term recommendations made in Tier 2.

Tier 1 Recommendations

1. Implement new standard application forms available online

Agencies will use standard application forms: 1) a short form to be used in conjunction with in-person transit skills assessments, and 2) a longer form to be used in conjunction with medical verifications and phone interviews. Each agency will post their application and other paratransit information on their website. To meet Title VI requirements, translated versions of the application and related essential documents will also be posted on transit agency websites.

2. Standardize renewal timelines for eligibility to five (5) years

Agencies will increase the eligibility period for both permanent eligibility and auto-renewals from three years to five years.

3. Expand intake call questions, identify paratransit alternatives, and enhanced promotion/incorporation of travel training

Agencies will expand the time and utility of intake calls to educate callers about mobility options and the intended role of ADA paratransit. In these calls, agencies will identify all accessible mobility options available in the community and ensure that these options are discussed in detail. As part of the enhanced promotion of mobility options, agencies will work with their county's mobility manager by ensuring eligibility and travel training programs work in tandem.

4. Standardize appeals process

Agencies will standardize the appeals process with the possibility of conducting appeals on a sub-regional basis with standing committees. This approach will reduce the administrative burden experienced by less resourced agencies that do not have the capacity to coordinate appeals committees. One standing appeals committee serving a number of systems can conduct eligibility appeals on a more efficient basis for the typically small number of individuals who appeal eligibility determinations.

5. Participate in eligibility trainings

MTC will sponsor annual regional eligibility training to enhance the skills of current evaluators, incorporating peer cross-evaluators. Systems without in-person assessments will receive half-day trainings while systems offering in-person assessments will receive full-day trainings.

6. Provide funding to smaller agencies

MTC will explore making funds available to smaller agencies to enhance the accuracy of their eligibility processes by joint contracting with one vendor responsible for multiple systems. As an interim step, this approach will be used for systems that are still reliant on paper- or phone- based applications that would benefit from evaluator staff with more specialized skills than their current administrative staff.

Tier 2 Recommendations

Tier 2 Draft Recommendations **represent a more substantial approach to the enhancement of ADA paratransit eligibility programs.** In recognition of the evolving landscape of accessibility, these strategies encompass strategic shifts that encourage a broader array of accessible transportation modes. From the expansion of in-person assessments to encompass initial determinations, to the exploration of innovative non-in-person options for specific categories, these recommendations are intended to customize the models used to best suit the mobility levels of individual applicants.

Tier 2 Recommendations

1. Upgrade and implement phone interviews

The small number of agencies that are currently limited to paper-based application models will implement phone interviews. Telephone discussions will allow eligibility evaluators to gain a greater understanding of applicants' mobility capabilities than a non-interactive paper application.

2. Expand role of in-person assessments

Some agencies only conduct in-person assessments for those applicants who are appealing their eligibility determinations. Given the familiarity these agencies have with in-person assessments, expansion of this function to a greater number of applicants should be less challenging than for those agencies that do not have this experience. The increase of in-person assessments will enhance the overall accuracy of eligibility determinations.

3. Increase application of trip conditional eligibility

Agencies will define conditional eligibility based on more objective or quantifiable language rather than general phrases. For example, rather than indicating that a person is eligible for a trip due to "distance," agencies will indicate that they are eligible for a paratransit trip when the distance to the bus stop is more than three blocks on either end of the trip. Agencies will also train eligibility staff to refine conditional language and create a shared understanding of the conditions under which a registrant's trip request is ADA-paratransit eligible. Additionally, agencies will implement a protocol of contacting conditionally eligible riders by phone to clarify their eligibility conditions and discuss alternatives to paratransit. As part of these alternatives, if feasible, agencies will make a staff "bus buddy" available to accompany riders on their first fixed-route trip.

4. Explore non-in-person options for certain categories

For applicants whose application is based on categories that are not conducive to in-person assessments (psychiatric, vision, seizures), agencies will explore non in-person assessments, such as the submission of professional verification with telephone follow-up.

5. Reach out to potential new eligibility vendors

Agencies will identify potential vendors who have rehabilitation backgrounds that can be adapted to in-person assessments. Agencies will reach out to these vendors to explain the process and generate interest in future contract solicitations.

6. Explore technical solutions to enhance eligibility implementation

Agencies will explore technical solutions to help enhance accuracy and consistency of eligibility programs, including optimal integration of eligibility and scheduling software programs. This will increase the capacity of paratransit programs to apply eligibility conditions to trip requests from those who are conditionally eligible.

Agency Specific Recommendations

Below are recommended improvements that are pertinent to each individual transit agency. These steps can be adopted on a system-specific basis with an eye towards regional standardization.

Incremental Eligibility Recommendations for Individual Transit Agencies

Transit System	Recommended Improvements
County Connection	A, C, D, F, I, J, K, M
East Bay Paratransit	C, D, H, I, J, K, M, N
Livermore Amador Valley Transit Authority (LAVTA)	A, C, D, E, F, I, J, K, M, N
Marin Transit / Golden Gate Transit (Marin Access)	B, D, E, F
Napa Valley Transportation Authority (NVTA)	C, D, E, H, M, N
Petaluma Transit	C, D, E, F, H, M, N
SamTrans	A, B, C, D, I, J, K, L, M, N
San Francisco MTA (SFMTA)	C, D, H, M
Santa Clara Valley Transportation Authority (VTA)	A, C, D, F, G, H, I
Santa Rosa CityBus	A, C, D, F, H, I
Solano County transit agencies	A, B, C, D, F, H, I, J, K, M, N

Sonoma County Transit	C, D, E, F, H, M, N
Tri Delta Transit	C, D, E, F, M, N
Union City Transit	B, C, D, E, F, H, M, N
WestCAT	C, D, E, F, H, M, N

A - Create two new standard applications: Create two standard application forms 1) for systems that use in-person assessments (short form), 2) for all other systems (shorter than current forms in select systems). Change usage of the term “functional assessments” to “transit skills assessments.”

B - On-Line application forms: Implement online application forms throughout the region, including translated versions to meet Title VI requirements

C - Expand intake call role: Expand time and utility of intake calls to educate callers about mobility options and the intended role of ADA paratransit.

D - Standardize appeals process: Standardize appeals process with possibility of conducting appeals on a sub-regional basis with standing committees.

E - Provide funding to smaller agencies: Provide funding to smaller agencies that are working to enhance the accuracy of their eligibility processes, including the possibility of joint contracting with one vendor responsible for multiple systems. As an interim step this approach can be used for systems that are still reliant on paper- or phone- based applications that would benefit from evaluator staff with more specialized skills than their current administrative staff.

F - Upgrade and implement phone interviews: For the small number of systems whose processes are limited to paper-based application models, upgrade and implement phone interviews that can be conducted on a sub-regional basis. Make exceptions for systems that are providing high quality, ADA-compliant paratransit service that is within their fiscal means.

G - Expand role of in-person assessments: For those systems currently operating very limited in-person assessments (e.g., for appeals only), expand this function to include initial eligibility determinations.

H - Identify paratransit alternatives and enhance promotion: Identify all accessible mobility options available in the community and ensure that these options are discussed in detail in the in-person and phone assessments.

I - Participate in eligibility trainings: MTC host NTI paratransit eligibility trainings annually to enhance skills of current evaluators. Consider half day trainings for systems without in-person assessments, and full day for those with in-persons. Incorporate peer cross-evaluator training and other mechanisms to improve consistency and overall QA/QC.

J - Increase application of trip conditional eligibility: For systems that have experience with in-person assessments pre-COVID and/or have returned to in-persons, implement the following measures to increase application of eligibility conditions (trip screening):

- Evaluate and improve conditional eligibility language to make it more operational. Where possible, define conditional eligibility based on concrete metrics rather than general phrases. For example, rather than indicating that a person is eligible for a trip

due to “distance,” indicate that they are eligible for a paratransit trip when the distance to the bus stop is more than three blocks on either end of the trip.

- Train eligibility and call taking staff to reflect more clearly defined conditional language. For example, eligibility and call taking staff (and the registrant should all share a similar understanding of the conditions under which their trip request is ADA-paratransit eligible.
- Implement protocol of contacting conditionally eligible riders by phone to clarify their eligibility conditions and discuss alternatives to paratransit.
- Make a staff “bus buddy” available to accompany rider on first fixed-route trip.

K - Explore non in-person options for certain categories: On an interim basis, explore potential for non in-person assessments for applicants whose application is based on certain categories not conducive to in-persons, such as psychiatric, vision, seizures (e.g., submission of professional verification with possibility of telephone follow-up).

L - Reach out to potential new eligibility vendors: Identify potential vendors who are not necessarily part of the small group of national eligibility contractors but have rehabilitation backgrounds that can be adapted to in-person assessments. Reach out to these vendors to explain the process and generate interest in future contract solicitations.

M - Explore technical solutions to enhance eligibility implementation: Explore technical solutions to help enhance accuracy and consistency of eligibility programs, including optimal integration of eligibility and scheduling software programs. For example, Trapeze has an eligibility module that can be used by schedulers to consider trip eligibility limitations when scheduling a trip.

N – Incorporate travel training: Ensure eligibility and travel training programs work in tandem.

Fully Integrated Regional System

A fully integrated regional system would include the establishment of regional in-person Mobility Centers for the purpose of conducting ADA paratransit eligibility assessments for all transit agencies in the Bay Area. This model would incorporate a range of levels of assessments, with the majority of applicants evaluated in-person, either through interviews or interviews plus transit skills assessments (TSAs).

These would be conducted as part of the function of sub-regional Mobility Centers. Three to five sub-regional centers are proposed in order to balance the goal of merging functions to achieve economies of scale for systems that are in close proximity to each other, while avoiding significant travel for paratransit applicants. In order to determine logical consolidation of facilities, further analysis will account for the specifics of each subregion, such as the distances applicants would have to travel to access each sub-regional center and an assessment of counties’ available resources to conduct assessments. This approach is also intended to address the needs of smaller systems that don’t have the resources to hire rehabilitation specialists or establish separate travel training programs.

The aim of each Mobility Center will be to serve as a one-stop shop for people with disabilities who are informed of the variety of mobility options in their area, including the use of paratransit service. A number of agencies in the Bay Area have already integrated their eligibility tasks into a larger mobility management function, and this strategy is intended to expand on those efforts and incorporate multiple agencies in the process.

Important aspects of a fully integrated regional system:

1. Establish three to five regional in-person Mobility Centers for the purpose of conducting ADA paratransit eligibility assessments for all transit agencies in the Bay Area. Determine the need for satellite offices in rural areas.
2. When implementing Mobility Centers, take into account the staggered timelines of current eligibility contracts. The different end points of each of these contracts can pose a challenge to entering into simultaneous contracting arrangements based on the recommendations included in this report.
3. When agencies have transitioned to in-person assessments, implement measures to expedite the eligibility process. Proposed adjustments to the process include:
 - Shortening of application form
 - Require Professional Waivers which simply require contact information for the applicant's healthcare professional) rather than Professional Verification forms
 - Limit in-person interviews to new applicants and re-applicants whose original term expired (rather than recertifications based on initial in-person assessment)
 - Extend certification term from three to five years
 - Expand automatic certification renewals (also known as auto-recert or auto-renewal) to all unconditional registrants, or if more categories are added, ensure that these are applied consistently throughout the region
 - Make the process as paperless as possible, while allowing for usage by those who do not have computer capabilities

Recommendations for MTC

Recommendations for MTC will include the following:

- Provide ongoing forums for eligibility training
- Upgrade and administration of RED
- Supporting efforts to identify paratransit alternatives and develop travel training programs through Action 21 of the Transformation Action Plan (Designate a mobility manager to in each county)

Decision Trees

To enhance the accuracy and efficiency of paratransit eligibility processes across Bay Area agencies, these sample decision trees can guide agencies as they streamline their paratransit eligibility evaluation processes while ensuring consistency and fairness. These decision trees offer a comprehensive framework to help agencies make well-informed eligibility determinations. By presenting a standardized visual representation of assessment criteria and outcomes, this approach aims to empower agencies with a tool that not only enhances the accuracy of eligibility decisions but also fosters a more transparent and equitable paratransit network in the Bay Area.

Qualification Process for systems that conduct in-person assessments

1. Applicant requests/submits application
 - a. Calls office for form to be mailed or dropped off
 - b. Emails office for Form
 - c. Submits application online
2. Staff reviews application for completeness
 - a. If incomplete, schedule phone or Zoom call to complete application
 - b. Once the form is completed, staff reviews the form, starting the 21-day timeline.
 - c. If applicable, evaluator will grant immediate medical needs certification
3. Staff contacts applicant
 - a. Staff finds that the applicant's form requires an in-person assessment
 - i. Depending on the application, staff may conduct an interview or an interview plus transit skills assessment
 - b. Staff finds that the applicant's form requires a follow-up phone or Zoom call, including discussion of mobility options - determines an In-person interview is needed
 - i. In the case of "gray area applications," an in-person assessment is necessary
 1. Depending on the application, staff may conduct an interview or an interview plus transit skills assessment
 - c. Staff determines that application is based on seizure, psychiatric visual, or cognitive disability. Eligibility assessment will be based off phone and/or healthcare provider submission
4. Staff makes eligibility determination
 - a. Applicant receives eligibility letter, ID card, rider's guide
 - b. If eligibility is denied, applicant can appeal determination

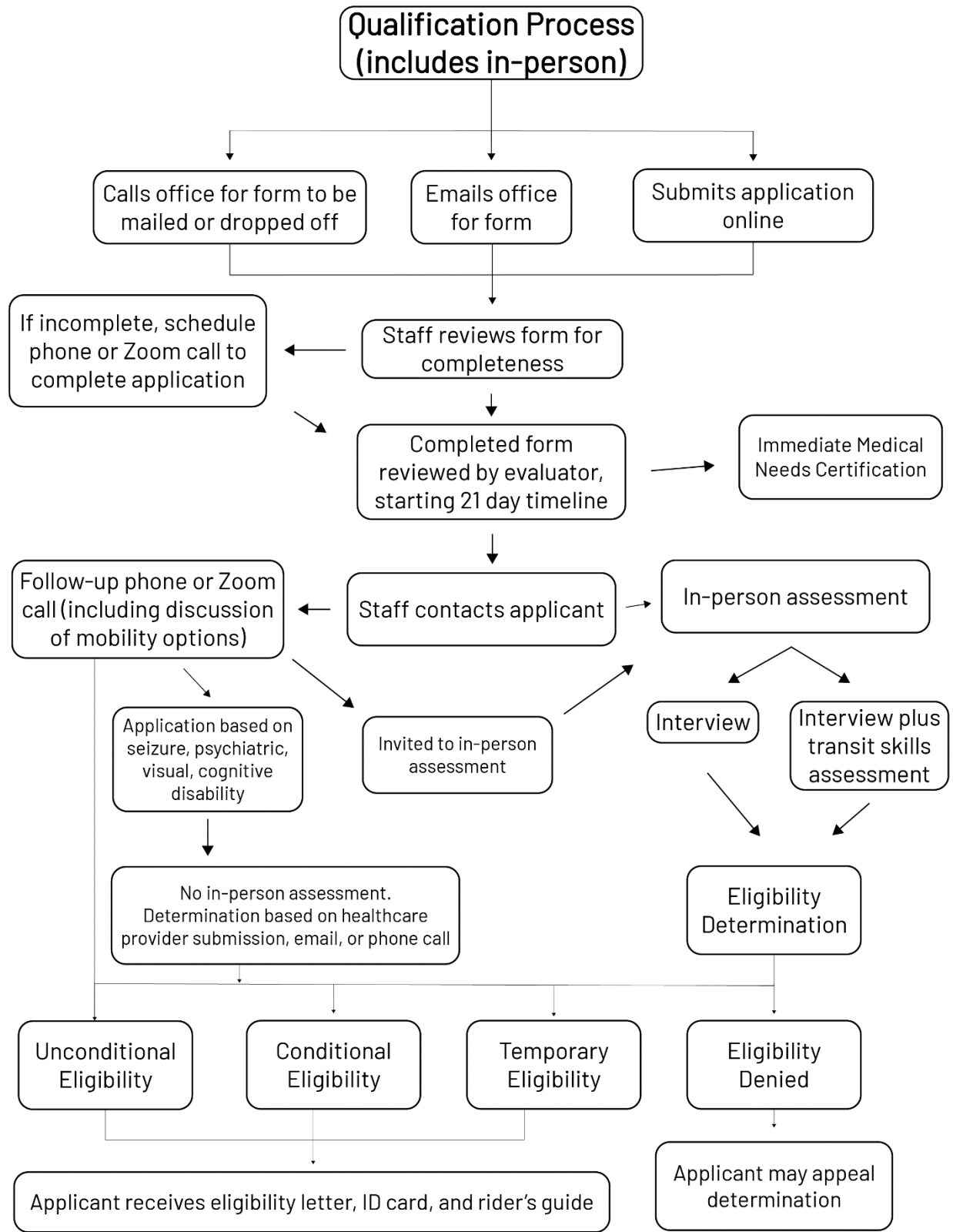


Figure 1: In-Person Qualification Process

Qualification Process for systems that do not conduct in-person assessments

1. Applicant requests/submits application
 - a. Calls office for form to be mailed or dropped off
 - b. Emails office for Form
 - c. Submits application online
2. Staff reviews application for completeness
 - a. If incomplete, schedule phone or Zoom call to complete application
 - b. Once the form is completed, staff reviews the form, starting the 21-day timeline.
 - c. If applicable, evaluator will grant immediate medical needs certification
3. Staff contacts applicant
 - a. Staff finds that the applicant's form requires an in-person assessment
 - b. Staff finds that the applicant's form requires a follow-up phone or Zoom call, including discussion of mobility options - determines an In-person interview is needed
 - i. In the case of "gray area applications," an in-person assessment is necessary
 - c. Staff determines that application is based on seizure, psychiatric visual, or cognitive disability. Eligibility assessment will be based off phone and/or healthcare provider submission.
4. Staff makes eligibility determination
 - a. Applicant receives eligibility letter, ID card, rider's guide
 - b. If eligibility is denied, applicant can appeal determination

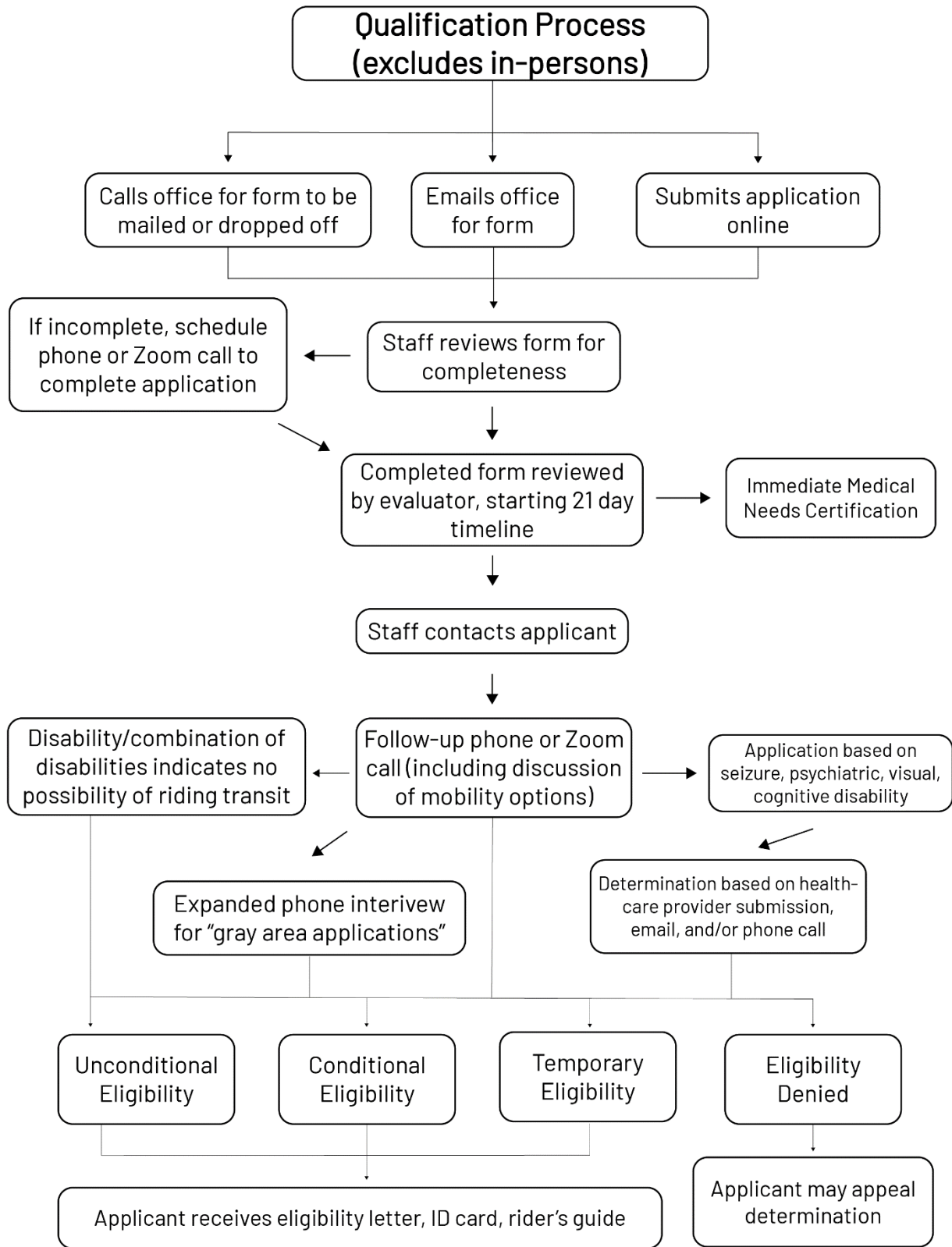


Figure 2: Non-In Person Qualification Process

Phone Interview Protocol

In response to requests from members of the BAPAC eligibility working group, Nelson\Nygaard created a phone interview protocol to guide Bay Area agencies through the optimal phone interview process and provide suggestions for common questions.

Follow-Up Protocol for Completed Applications

The following describes the steps needed once a staff person has determined that the submitted applications are complete.

Determine if applicant should be referred to:

- Phone/Zoom Interview (more details below)
- In-Person Interview
- In-Person Interview and possible Transit Skills Assessment (TSA, formerly known as functional assessment)

This determination for a phone interview is made based on the following questions:

- Is the primary basis for the individual's application a cognitive, visual, psychiatric disability or a seizure disorder? (no in-person needed)
- Is the individual a wheelchair user and unable to self-propel?
- Does the combination of the applicant's disabilities suggest that they cannot now and are unlikely in the future to be able to use transit independently under any circumstances – (no in-person needed, likely be granted unconditional eligibility after a phone interview and review of professional verification).

If any of these situations apply, the evaluator will conduct the following phone or zoom interview (keep in mind all the text in this document is suggestive, and you should use your own language rather than repeating the exact text as stated below):

General Protocol

- Explain the purpose of the phone or Zoom interview – “This is an opportunity for you to explain your travel abilities and your need for ADA Paratransit service.”
- Explain what will happen – “We will have a short phone interview which may result in a determination being made on your eligibility, or we may need some extra information from your treating professional, or you may be referred for an in-person assessment.”
- Explain that the transit agency provides ADA Paratransit service for customers who are unable, because of their disability, to ride the bus/train for some or all their trips.
- “There are a couple of different types of eligibility, either *Unconditional*, in which it is determined that you need ADA Paratransit for all your trips, or *Conditional*, in which you can use ADA Paratransit for some trips but are expected to ride transit for other trips. There is also *Temporary* eligibility in case your disability is short-term”
- “Do you have any questions about ADA paratransit eligibility?”

- “Any information you provide will be kept confidential.”

Phone/Zoom Interview

- Please tell me how you currently travel outside your home?
- Have you ridden transit before?
- When was the last time and how often?
- How do you believe your disability prevents you from riding transit?
- Are you able to cross streets by yourself?
- What about large intersections?
- Are you able to walk over uneven surfaces (grass, sand, gravel)?
- Are you able to travel up a gradual hill?
- How far would you be able to walk in ideal weather? How many city blocks?
- Does weather affect your ability to travel? If so, how?
- Are you able to grip a handrail?
- Please tell me about your ability to keep your balance in a crowd.
- Are there any barriers that would affect your ability to travel to a bus stop?

If the applicant has stated either in their application form or in response to the questions above that they cannot use transit because of one of the following disabilities, please continue the phone interview using the list of questions below pertinent to their disability.

Keep in mind, these questions are relatively high level and you’ll be relying heavily on the professional verification submission to make a determination.

Cognitive

- Do you use a telephone?
- Have you ever traveled alone on a bus? What would you do if you got lost?
- Would you recognize places if you have been to them before?
- Have you had training to travel in the community? Which places did you learn to go to? Are you able to go to those places now?

Psychiatric

- When were you first diagnosed with your disability?
- How do you feel your disability prevents you from riding transit?

- What can paratransit do for you that you cannot do on buses and trains?
- Do you take any medications? If so, how do they help you?
- Do you experience any side effects from the medication?

Visual

- Can you describe how your visual limitations affect you?
- Are your visual limitations stable, degenerative, or otherwise changing?
- Do you have any disabilities besides vision that prevent you from riding the bus or train?
- Do you have a visual acuity statement from your treating professional? (FYI, 20/200 is legally blind)
- Do you use any mobility aids when you are outdoors?
- Can you walk alone outdoors? If yes, when can you travel? Can you go further than a block from your home?

(If person has said that they're partially sighted, ask the following questions)

- Can you see steps or curbs?
- Is your vision worse during daytime, nighttime, about the same in all lighting conditions?
- Can you clearly see bus signage including route number; are you able to differentiate between buses at a stop with multiple routes?

(If person has never used transit)

- Have you considered getting instructions on how to ride transit? If not, are you interested?

Seizure Disorder

- What type of seizures do you have?
- How frequently do they occur?
- When were you first diagnosed with this condition?
- Are there certain things that trigger your seizures? What are they?
- What happens when you have a seizure? Do you have an aura (a warning that they are about to have a seizure)?
- What happens when your seizure has ended? (Are they severely disoriented?)
- Do you take medication for your seizures? Has it helped control the seizures or their effects?

- How do you think traveling on ADA Paratransit will be better for you than traveling on transit?

Use this opportunity to explain other mobility options in the community that may be suited to the applicant.

In-Person Assessment

All applicants who do not have a phone interview will have an in-person assessment. All in-person assessments will start with an interview - some will also require a Transit Skills Assessment (TSA, formerly known as a Functional Assessment). As a general rule, transit agencies assume 20 to 30 minutes for an interview, and 30 to 45 minutes for an interview and TSA, depending on whether a FACTS test for those with cognitive disabilities is included (excluding associated administrative tasks).

How do you decide whether to conduct a Transit Skills Assessment?

If the applicant does not fall into one of the categories listed above for phone/Zoom interviews, do you feel confident that an interview will allow you to make a well-informed eligibility determination, including whether the applicant may be able to ride transit some of the time?

In general, you should err on the side of proceeding with an expanded assessment as long as there is sufficient staffing capacity (or if there are guidelines in a vendors' contract on percentage of TSAs). This is particularly true in the context of "gray area" applications, in which it is difficult to decide on a determination just based on the application form and phone/zoom interview.

The kinds of situations in which an expanded assessment would be warranted are listed below. If the application indicates that, due to their disability, they may have difficulties:

- Walking or ambulating more than two blocks
- Going uphill because they use a manual wheelchair
- Walking at a reasonable speed
- Maintaining balance while riding a bus

Please add to this list based on your experience. If you think an applicant may be conditionally eligible or denied eligibility, you should refer them to an expanded assessment.

Once you have determined what kind of assessment the applicant will participate in:

- Applicant should be asked to bring the primary mobility aid(s) they use to travel in the community
- Applicant should be advised to dress accordingly in the event that they will participate in an outdoors FA
- Make travel arrangements to the interview site if necessary

Note: It is important to remember that if you are still uncertain about the applicant's final determination, you should contact the healthcare provider listed in their application to solicit additional information. Good practice would be to conduct follow-ups in 15 – 30% of applications (including those

already included in the phone/zoom interview category). Attempts to reach the professional should be well-documented in order to ensure a timely turnaround of an eligibility determination.

Should you schedule an Interview or an Interview plus Transit Skills Assessment?

Since interviews generally take shorter than a combined interview plus TSA, e.g., 30 versus 45 minutes, it is useful for scheduling purposes to have a rough idea of what proportion of in-person assessments are likely to include a TSA or not. In some instances, TSAs may only be conducted by trained rehabilitation therapists on certain days, in which case it will be even more important to make the determination before scheduling the assessments. The discussion above assumes that the evaluator has been trained to conduct TSAs and will make a decision either prior to or during the interview whether to proceed to a TSA.

The guidelines above are intended to help with that determination. These guidelines may change over time depending on the volume of applications received, and the capacity of staff to handle either the interviews or the expanded assessments (including TSAs).