



Minnesota Regional Transit
Board: Records.

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MEETING OF THE REGIONAL TRANSIT BOARD
Monday, January 4, 1988
Metropolitan Council Chambers
4:00 p.m.

AGENDA

1. Call to Order and Roll Call
2. Approval of Agenda
3. Approval of Minutes of December 7, 1987 Board Meeting and November 30, 1987 Committee of the Whole Meeting
4. Consultant Selection for Light Rail Transit Planning Analysis, Midway Corridor
5. Metro Mobility Evaluation Report
6. REPORT OF THE POLICY COMMITTEE Doris Caranicas,
Chair
7. REPORT OF THE ADMINISTRATION AND FINANCE COMMITTEE Ruth Franklin,
Chair
8. REPORT OF THE NOMINATING COMMITTEE Paul Joyce,
Chair
9. OTHER BUSINESS
- A. Chairman's Report
 - 1) Appointment of Committee Members and Chairs
- B. Members' Reports
- C. Advisory Committee Reports
- D. Staff Reports
09. PUBLIC COMMENT

Elliott Perovich
Chairman

Ding

L. Jones

Sails
Haplin
Waney
Bastard
Tom Todd

CA
UH
EK
T.B.
KKT
MK
MR

REGIONAL TRANSIT BOARD
ROLL CALL AND ATTENDANCE SHEET

DATE: Jan 4, 1989

BOARD OR COMMITTEE: R.T.B.

| MEMBER NAME | PRESENT | VOTE | VOTE | VOTE | VOTE | VOTE |
|-----------------|---------|------|------|------|------|------|
| Chairman | ✓ | | | | | |
| Doris Caranicas | ✓ | | | | | |
| Ruth Franklin | ✓ | | | | | |
| Carole Faricy | ✓ | | | | | |
| Alison Fuhr | ✓ | | | | | |
| Rochelle Graves | | | | | | |
| George Isaacs | ✓ | | | | | |
| Paul Joyce | ✓ | | | | | |
| Edward Kranz | ✓ | | | | | |

REGIONAL TRANSIT BOARD

270 Metro Square Building, St. Paul, Minnesota 55101

Minutes of the Meeting of the
REGIONAL TRANSIT BOARD
Metropolitan Council Chambers
December 7, 1987

BOARD MEMBERS PRESENT: Elliott Perovich, Chairman; Doris Caranicas; Carole Faricy; Ruth Franklin; Alison Fuhr; George Isaacs; Rochelle Graves; Paul Joyce; Ed Kranz

OTHERS PRESENT: Gregory Andrews, Kathy Christopherson, Mary Fitzgerald, Judy Hollander, Jan Hennings, Tom Beaver, Mike Kuehn, Ed Kouneski, Randy Rosvold, Mark Ryan, Katie Turnbull, Regional Transit Board Staff; Charles Weaver, legal counsel; Arnie Entzel, Amalgamated Transit Union; Joel Alter, Legislative Audit Commission; Emil Brandt, Steve Wilson, Metropolitan Council; John Doyle; Steve Bertrand, United Handicapped Federation; Bev Auld and Greg Failor, Metropolitan Transit Commission; Jim Johnson, Medicine Lake Bus Company; Paul Houck

The meeting was called to order at 4:00 p.m. and roll taken. Caranicas moved approval of the agenda; Joyce seconded the motion. Motion carried (Kranz, Graves and Faricy not present).

Fuhr moved approval of the minutes of the November 16, 1987 meeting; Joyce seconded the motion. The motion carried (Kranz, Graves and Faricy not present).

Fuhr moved to reconsider the approval of the November 16 minutes; Caranicas seconded the motion; the motion carried (Kranz, Graves and Faricy not present).

In response to Fuhr's question about why Faricy was shown in the minutes not to be present for some votes, Fitzgerald said that when a member is not present, it is necessary to note that he or she did not vote on an action. The minutes record the point at which the member arrives. Fuhr moved to approve the minutes, Isaacs seconded the motion. The motion carried (Kranz, Graves and Faricy not present).

CONSENT LIST

Environmental Assessment Worksheet for the NBA Area and Health Club in Downtown Minneapolis

Caranicas moved that the above consent list item be approved; Joyce seconded the motion. The motion carried (Kranz, Graves and Faricy not present).

WORK PROGRAM AND REQUEST FOR PROPOSAL FOR LIGHT RAIL PLANNING ACTIVITIES IN THE MIDWAY CORRIDOR

Turnbull reviewed the November 30, 1987 staff report, adding that at its meeting this morning, the Ramsey County Regional Railroad Authority approved the work program. (Faricy, Graves and Kranz arrived.) In response to Fuhr's question, Hollander said the engineer will probably join staff midway through this process. There was discussion of whether board members will be part of

the consultant selection team. Joyce said he is comfortable with the professionalism of the staff in making the recommendation to the board. The chairman said staff from the other agencies will participate in the selection process and RTB staff will present the recommendation, along with the list of consultants who responded and the rationale for its selection, to the board for its approval. Fuhr said the board should consider going through a promotional campaign for University Avenue. Fuhr moved:

1. That the Regional Transit Board approve the Work Program for Planning Activities in the Midway Corridor, and
2. That the Regional Transit Board approve the Request for Proposal for consultant assistance and authorize the issuing of the Request for Proposal.

Caranicas seconded the motion; the motion carried unanimously.

REPORT OF THE POLICY COMMITTEE

Committee Chair Caranicas reviewed the report of the committee dated November 17, 1987.

REVISION TO METRO MOBILITY ELIGIBILITY CRITERIA: CHIROPRACTORS' AUTHORITY TO CERTIFY

Caranicas moved and Joyce seconded:

That the Regional Transit Board amend the Metro Mobility Eligibility Requirements to include chiropractors as authorized medical professionals for certifying riders.

The motion carried unanimously.

GUIDELINES FOR COST-SHARING

Caranicas moved and Isaacs seconded:

That the Regional Transit Board adopt the guidelines for implementing the regional policy on cost-sharing arrangements.

Kranz said he has a lot of questions about the impact of cost-sharing on new service to suburban areas and moved that the item be tabled. Isaacs seconded the motion. Motion failed.

Kranz said suburban communities are paying an adjusted mill levy for transit and a number of them are poorly served. Franklin said it was clear from the discussions that if it was new service for a specific institution such as a large insurance company that asked for service to a parking lot, cost-sharing would be utilized. Additional buses going to Blaine would not be a cost-sharing situation. Kranz said on all three criteria the overall policy is directed toward new service and cost-sharing for all new service. Franklin said many suburban cities have regular route service. If the outlying cities want some kind of circulator system that would not be feasible for MTC, they would communicate with the RTB and would have to agree to provide some of the subsidy. This would be different from regular route service. Joyce said this has been the practice throughout the area for a long time and this will codify

the practice. The mini-buses that served Nicollet Mall were that kind of service, but the city stopped subsidizing them.

Jim Johnson discussed his December 7 letter on the possible conflicts between cost-sharing and competitive bidding policies. He would like a linkage with cost-sharing to avoid conflicts down the road, particularly in cost allocation. Vote was taken; the motion carried unanimously.

METROPOLITAN TRANSIT COMMISSION HIGH SUBSIDY ROUTES

Caranicas moved and Franklin seconded:

1. That the Regional Transit Board request the Metropolitan Transit Commission to competitively bid Minneapolis Route 26 (Saturday), Minneapolis Route 67 (Saturday), and St. Paul Route 46 (weekday).
2. That these routes shall be bid based on Regional Transit Board policies, including the Competitive Procurement Guidelines anticipated to be adopted in December 1987. The RTB will work with the MTC to monitor this process and the results as one of the test cases of the Competitive Transit Demonstration project.
3. That the Regional Transit Board requests the Metropolitan Transit Commission to continue to operate service on Minneapolis Routes 88 and 89 to examine these routes as part of the comprehensive examination of service improvements in the I-494 corridor as recommended by previous action.

In response to Fuhr's question, Turnbull said this was suggested by MTC. They asked for authority to bid out these routes. Staff feels it is RTB's role to determine the best mix of services. Who bids the service is a separate issue. RTB is in control of what should be bid and how it should be done. This is a test to see if they can do it, what type of response we get from providers, and what costs are involved. MTC has indicated they do not expect any additional costs and we want to look at issues of coordination. MTC would sign the contract under overall RTB authorization. The board will see it as it comes through the budget process.

The chairman said this is a direct change of policy. RTB legislation says we will contract for service and MTC will operate. This would make MTC the broker of service and necessitate coordination between contracts administered at MTC and those administered at RTB.

In response to Graves' question, Weaver said it is a legal change of policy. Andrews said it is a change in policy, but when the board adopted the interim standards staff identified high subsidy routes and proposed a process the board would proceed with that includes having the MTC bid out routes. Hollander noted that this is a demonstration project. It is an opportunity to learn whether this makes sense under some circumstances and use the experience gained to determine if a change in policy is necessary. Members discussed who would be ultimately responsible. Joyce called the question. Vote was taken; motion carried (Fuhr, Perovich and Graves voted "no"). Staff was directed to return with a sunset provision.

Caranicas said the final Metro Mobility Evaluation Report has not been received. Staff must review it for contract compliance, but it was agreed that the report will be sent to members as soon as it arrives at the office.

REPORT OF THE ADMINISTRATION AND FINANCE COMMITTEE

Committee Chair Franklin reviewed the amended committee report of its meeting of November 23, 1987.

1988 REGIONAL TRANSIT BOARD BUDGET APPROVAL, RESOLUTION NO. 87-15

Franklin moved and Caranicas seconded:

That the Regional Transit Board approve Resolution No. 87-15, consisting of the Regional Transit Board Work Program and Budget of operating expenses (\$78,583,700); capital expenses (\$292,270); and debt service (\$4,288,255); and the 1988 Metropolitan Transit Commission Work Program and Budget of operating expenses (\$99,000,000); and capital expenses (\$26,499,748).

Roll call vote was taken; motion carried unanimously.

AMENDMENT TO THE IMPLEMENTATION AND FINANCIAL PLAN TO INCLUDE THE METROPOLITAN TRANSIT COMMISSION'S SNELLING PARKING LOT PROJECT

Franklin moved and Caranicas seconded:

That the Regional Transit Board amend the Implementation and Financial Plan to include the Snelling Garage Project as detailed in the Metropolitan Transit Commission's 1988 Capital Plan and transmit this action to the Metropolitan Council.

In response to Graves' question, Andrews said the cost of the Snelling parking lot is \$554,960. Graves said the MTC will come back at a later date asking for maintenance and it is irresponsible of the board not to consider that in the vote. Franklin said it had been pointed out to MTC that there was consensus on of the board that MTC should consider charging for parking to finance maintenance of the facility.

Graves said \$550,000 is a lot of money where she lives and her area cannot get regular route service or bus shelters; going back to tell people what was approved will not go down well with her constituents. She suggested that MTC put money aside each month so they will not have to approach the RTB for funds for maintenance of the lot. It should be on the record that some people are concerned about where this future funding is coming from. These employees make more than \$15 an hour and could pay a small amount for maintenance. She works for a major state employer and is paying parking as a part of doing business. She asked members to consider this in their vote. Caranicas said the motion does not say this is free parking. Entzel said he wished to correct Graves because it is not true that drivers make \$15 per hour. The top salary is \$13 per hour. Vote was taken and the motion carried (Graves and Fuhr voted "nay").

Franklin said this was discussed several times and many members have some reservations about the expense, knowing MTC employees get free bus passes. She suggested that the board recommend to MTC that they implement a plan offering an choice to employees. Kranz said that is getting close to involving RTB in

the operations of MTC. Franklin suggested that this be discussed at the Policy Committee. Caranicas said the committee can discuss it but reminded members that it is a negotiable item in the MTC labor contract. Perovich said the Metropolitan Council also expressed reservations. Andrews said the council was concerned that the MTC should look at alternatives. Background information on a study of options for providing the parking has been received.

OTHER BUSINESS

CHAIRMAN'S REPORT

Membership Roster for Providers Advisory Committee

Rosvold reviewed the November 30 staff report and noted that the applications were handed out to members. Isaacs moved:

That the Regional Transit Board table the appointment of membership of the Providers Advisory Committee until its meeting of December 21, 1987.

Isaacs said he would like to wait until the next meeting because he had not had time to review the information and make a decision. Graves seconded the motion; The motion carried (Franklin abstained).

Franklin said she hoped staff had recommended people who are interested and will represent the various groups. If the board tries to change the recommendations it may throw the type of committee out of sync. Isaacs said the board should not accept recommendations if it disagrees with staff. Kranz said this is an important committee and he is concerned that some nominees have a preference for a strict privatization policy of broad orientation and do not consider interests of the MTC at all. If appointed, this advisory committee could be very conservative and be one-sided. It is the responsibility of the board to look at the whole range. The staff is very involved in the actual competitive bidding process and it is a conflict for staff to make recommendations on a committee that will review the process they implement is a conflict.

Caranicas said the board has already designated the type of members that should be on the committee. The people on the list meet the agreed-upon criteria. It can be assumed that people who want to participate will contact them. Kranz said, of the people who applied from the suburbs, one is to be from a community with a community-based transit system. He does not think someone else is designated. Andrews agreed; since one is specified, staff thought there should be one representative from a community that does not have a system. The chairman said the intention was to get diversity and balance. His recommendation for chair of the committee is Juanita Collins, who served on the first Regional Transit Board. Joyce moved and Caranicas seconded:

That the Regional Transit Board approve the appointment of Juanita Collins as chair the the Providers Advisory Committee.

The motion carried unanimously.

Appointment of Members to Transportation Handicapped Advisory Committee

Hennings reviewed the December 7 memorandum. Faricy moved and Kranz seconded:

That the Regional Transit Board approve Carl Rauer for appointment to the Transportation Handicapped Advisory Committee to represent Regional Transit Board District A, and Jean Ross to represent Regional Transit Board District H.

The chairman reported that last week Commissioner Levine called together a legislative delegation for the first in a series of meetings. Perovich and Kuehn visited nine legislators in Southwest Minnesota. There seemed to be consensus that a transportation bill has to come out of this session and must include the transfer of Motor Vehicle Excise Tax along with consideration of an increase in the gas tax. There was good support for Metro Mobility funding. The next trip will be to Northwestern Minnesota starting December 15.

MEMBERS REPORTS

Fuhr reported on the North Star Transportation Conference last week. Isaacs reported on the League of Women Voters meeting on December 5. People are becoming more concerned and interested in transit issues and the board must disseminate more information. Faricy said "60 Minutes" did a report on light rail transit. Graves said at the Minneapolis Chamber of Commerce meeting of the Corridor Action Committee it was decided that Marquette is the most appropriate route. They also looked at the University Corridor and how to connect it. Franklin said the board has a representative on the Inter-governmental Policy Committee and all reports from the committee, which in turn will, in turn, make recommendations to the Hennepin County Regional Railroad Authority. If members have concerns about anything, the board should discuss them before the process gets to that point. The chairman said that if the board does not feel it can influence the decisions now it is in trouble. We should look at the issues and not give up on them.

Faricy, Franklin and Perovich will meet on December 14 to discuss the per diem issues.

ADVISORY COMMITTEE REPORTS

John Doyle, Chair of the Rideshare Advisory Committee, said things are going well and he thinks the board will be pleased with the consultant's evaluation report. The report will have an impact on how people look at traffic management. We must make more efficient use of what we have.

STAFF REPORTS

Andrews urged members to attend the Regional Transit Board Annual Conference on December 10. Joel Alter said he plans to distribute the draft Legislative Audit Commission report on December 11. Andrews and Alter attended the Transportation Research Board conference in Norfolk, which reviewed various types of transportation organizations and whether they will meet the needs for the future. One outcome was the necessity of getting involved in problems early on, before they become critical. The report will be ready in three to four months.

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2

PUBLIC COMMENT

Paul Houck, representing himself, said that at the last meeting MTC scrutinized the bidding procedures on certain contracts. He feels they have a natural bias to be the only transit provider in the Metropolitan Area. This is like letting the fox guard the chicken coop and passing the buck on something the board should be doing. The board should reconsider this and keep within its jurisdiction.

There being no other business, Caranicas moved and Joyce seconded that the meeting be adjourned; the motion carried unanimously. The meeting was adjourned at 6 p.m.

Respectfully submitted,

Mary Fitzgerald
Secretary

REGIONAL TRANSIT BOARD

270 Metro Square Building, St. Paul, Minnesota 55101

Minutes of the Meeting of the
COMMITTEE OF THE WHOLE
Metropolitan Council Chambers
November 30, 1987

BOARD MEMBERS PRESENT: Elliott Perovich, Chairman; Doris Caranicas; Carole Faricy; Ruth Franklin; Alison Fuhr; George Isaacs; Rochelle Graves; Paul Joyce; Ed Kranz

OTHERS PRESENT: Gregory Andrews, Mary Fitzgerald, Jan Hennings, Mike Kuehn, Regional Transit Board Staff; Charles Weaver, legal counsel; Bob Rossman, Amalgamated Transit Union; Steve Bertrand, United Handicapped Federation; Greg Failor, Metropolitan Transit Commission

The meeting was called to order at 5:00 p.m. and roll taken. Isaacs suggested that the agenda be amended to include discussion of the recent letter from Urban Mass Transportation Administration (UMTA); Fuhr moved approval of the agenda as amended to include Isaacs' suggestion; Joyce seconded the motion; the motion carried unanimously.

Graves moved that Item 4, Board Members' Expenses, be discussed in executive session. Weaver said that cannot be done under the requirements of the Open Meeting Law. Perovich suggested that Franklin, as chair of the Administration and Finance Committee, develop a set of allowable expenses. Faricy suggested the Perovich chair a meeting to identify guidelines.

1988 LEGISLATIVE PROGRAM

The chairman said that at a retreat sometime ago the members discussed legislative initiatives. Andrews said RTB increased its request for Metro Mobility funding. Regarding capital bonding, a letter has been received from John Capell stating that MTC does not need it additional funding authority in 1988.

Members discussed hiring a public relations consultant to deal with light rail transit, repeal of Schreiber amendment, and the Metropolitan Council's authority over light rail through the Land Planning Act.

In response to Faricy's question about what legislative package could be considered successful, Perovich said Metro Mobility funding is the first priority. Short-term borrowing authority and repeal of the Schreiber amendment are also important to us. Andrews said he is monitoring the property tax situation closely and something must be done before 1989 or we could lose as much as \$17 million. The Department of Finance is aware of the problem and is working on it.

Members discussed hiring a lobbyist. The chairman said it would be unnecessary and a poor expenditure of public funds. Counsel was asked how a lobbyist would assist the board. Weaver said that if a lobbyist was retained, he or she would have to learn the issues and programs of all the agencies from the start. Very few lobbyists testify; their function is to contact legislators. There was discussion of effective techniques and expectations of the lawmakers. Franklin

COMMITTEE OF THE WHOLE MINUTES
November 30, 1987
Page Two

suggested that everyone would benefit from a training session on how to go about lobbying the board's issues. The chairman said legislators understand the need for the Motor Vehicle Excise Tax funds. Weaver was asked to present a dollar figure to engage a team of lobbyists.

BOARD MEMBERS' EXPENSES

There was consensus that Perovich, Faricy and Franklin would meet and develop guidelines for per diems. Andrews distributed a list of allowable per diem meetings. Weaver noted that board members cannot be reimbursed for meals in the Metropolitan Area. There is a separate fund for the use of the chairman.

URBAN MASS TRANSPORTATION ADMINISTRATION LETTER ON ROUTE 52

Isaacs said a recent letter received from Charlotte Adams of UMTA states that Route 52 will be rebid, which is not his understanding. Andrews said he was surprised at that statement and told MTC that the UMTA letter does not reflect the position of the board. The University of Minnesota will make that decision. He has been trying to reach Ms. Adams to correct the misunderstanding. Kranz said the board must respond to the letter.

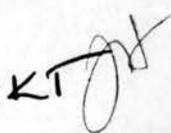
There being no further business, Caranicas moved that the meeting be adjourned; Graves seconded the motion. The motion carried unanimously.

Respectfully submitted,

Mary Fitzgerald
Secretary

REGIONAL TRANSIT BOARD

Suite 270 Metro Square Building, Saint Paul, Minnesota 55101
292-8789

DATE: December 21, 1987
TO: Regional Transit Board
FROM: Katherine Turnbull, Planning Manager 
SUBJECT: Authorizing the Executive Director to Negotiate and Enter into a Contract with BRW, Inc., to Conduct the LRT Planning Analysis for the Midway Corridor

SUMMARY

This memorandum summarizes the consultant selection process for the LRT Planning Analysis for the Midway Corridor. Authorization is requested for the executive director to negotiate and execute a contract with the selected consultants, BRW, Inc. with Bechtel Civil, Inc. and LTK Engineering, for a amount not to exceed \$100,000.

BACKGROUND

Based on board authorization received on December 7, 1987, Requests for Proposals (RFP's) for the Midway Corridor LRT Planning Analysis were issued on Tuesday, December 8, 1987. RFP's were mailed to 17 firms, both local and national, with expertise in LRT planning and design. A list of these firms is attached.

Seven (7) proposals were received on Thursday, December 17, 1987. Proposals were received from the following firms:

- o Parsons Brinckerhoff Quade & Douglas, Inc., with Manuel Padron and Associates and Bakke Kopp Ballou & McFarlin, Inc. (\$75,080)
- o Charles River Associates, Incorporated, with Thomas K. Dyer and Howard, Needles, Tammen & Bergendoff (\$49,975)
- o Edwards and Kelsey, Inc., with LS Transit Systems, Inc. (\$95,683)
- o MSR Team--Mark J. Kosmas, with CP Consulting Services, Inc., and Ehlers & Associates, Inc. (\$35,595)
- o Strgar-Roscoe-Fausch, Inc., with Roger Clark and EMJ/Electrack, Inc. (\$178,080)
- o BRW, Inc., with Bechtel Civil, Inc., and LTK Engineering (\$87,571.80)
- o Barton-Aschman Associates, Inc., with DeLeuw, Cather & Company (\$88,865, with an additional \$8,500 optional activity)

The proposals were reviewed by an interagency consultant selection committee. The committee was comprised of Kathy DeSpiegelaere, Ramsey County; Natalio Diaz, Metropolitan Council; Steve Grochala, City of St. Paul; and Judith Hollander and Katherine Turnbull, Regional Transit Board. In addition, board member George Isaacs reviewed the proposals independently and provided comments to staff.

The committee individually reviewed and rated the proposals based on the following four criteria. These criteria were included in the Request for Proposal (RFP).

- o Understanding of project objectives, including problems, issues and approach (30%).
- o Project work program, including proposed elements, innovative approaches, understanding of key components and overall structure (40%).
- o Qualifications of firm and personnel, including experience, project team composition, management structure, qualifications and experience of key personnel and commitment of time to project (20%).
- o Project cost detail, including person-hour commitment, billing rates, and commitment to complete the project within the proposed budget and schedule (10%). Please note that we did not provide a cost guideline in the RFP. It is anticipated that the cost will be negotiated with the selected consultant based upon an agreed work plan.

The consultant selection committee met on Monday, December 21, 1987, to review and rank the proposals. The committee extensively discussed each proposal. The committee unanimously recommended the firm of BRW, Inc. with Bechtel Civil, Inc. and LTK Engineering to senior RTB staff. A copy of the proposal is attached.

The one area the Consultant Selection Committee felt the proposal could be strengthened was in the patronage forecasting. It was suggested that additional resources and personnel, possibly the use of Richard H. Pratt Consultant, Inc., be added to the consultant's team. This has been discussed with BRW, Inc. and will be added to the negotiated contract. Additional resources of approximately \$12,000 will be earmarked for this activity, bringing the anticipated overall contract to approximately \$100,000.

FINDINGS AND CONCLUSIONS

- o Based on board action, the RTB issued a Request for Proposal (RFP) on December 7, 1987, to 17 firms, both local and national, with expertise in LRT planning and design.
- o Seven proposals were received on Thursday, December 17, 1987.
- o The proposals were reviewed and rated by the Interagency Consultant Selection Committee and reviewed by Board Member Isaacs.
- o The Consultant Selection Committee unanimously recommended the firms of BRW, Inc. with Bechtel Civil, Inc. and LTK Engineering to RTB senior management.

RECOMMENDATION

That the Regional Transit Board authorize the executive director to negotiate and execute a contract with BRW, Inc., in an amount not to exceed \$100,000 to conduct the LRT Planning Analysis for the Midway Corridor.

KT:jmo

REGIONAL TRANSIT BOARD

Suite 270 Metro Square Building, Saint Paul, Minnesota 55101
292-8789

DATE: December 22, 1987
TO: Midway Corridor LRT Analysis File
FROM: Katherine Turnbull, Planning Manager
SUBJECT: Request for Proposal (RFP) Mailing

Based on the December 7, 1987, board action authorizing the executive director to issue RFP's for LRT Planning Analysis in the Midway Corridor, RFP's were mailed to the following firms on Tuesday, December 8, 1987:

| | |
|---|---|
| Mark J. Kosmas | LTK Engineering Services |
| Rice Center | Simpson and Curtin |
| Parsons, Brinckerhoff, Quade and Douglas, Inc. | Strgar-Roscoe-Fausch, Inc. |
| Multisystems, Inc. | Howard Needles Tammen and Bergendoff |
| Deleuw, Cather and Company | Short Elliott Hendrickson, Inc. |
| Booz, Allan and Hamilton | BRW, Inc. |
| Bechtel Civil & Minerals, Inc. | Kaiser Raymond Engineering, Inc. |
| Barton-Aschman Associates, Inc. | |



PLANNING
TRANSPORTATION
ENGINEERING
ARCHITECTURE

BENNETT, RINGROSE, WOLSFELD, JARVIS, GARDNER, INC. • THRESHER SQUARE • 700 THIRD STREET SOUTH • MINNEAPOLIS, MN 55415 • PHONE 612/370-0700

December 16, 1987

Ms. Katherine F. Turnbull
Planning Manager
Regional Transit Board
270 Metro Square Building
St. Paul, MN 55101

Dear Ms. Turnbull:

Enclosed is BRW's proposal to work with the Regional Transit Board and the Ramsey County Regional Railroad Authority on the LRT Planning Analysis in the Midway Corridor. The team members and their general responsibilities are outlined below:

- BRW, Inc. - will serve as the prime contractor and be responsible for project management, definition of evaluation criteria, alternatives evaluation, report production, presentation graphics, public presentations, and financial evaluation.
- Bechtel Civil, Inc. - will be responsible for civil engineering aspects of alternative alignments and station design, capital cost estimates, and participation in the formation of evaluation criteria and alternatives evaluation.
- LTK Engineering Services, Inc. - will be responsible for transit operational analysis, operating and maintenance cost, system safety and security, and participation in the formation of evaluation criteria and alternatives evaluation.

This is the same team that is currently assisting Hennepin County in the development of a Comprehensive LRT System Plan. The team feels the benefits of the same consultants working on the Hennepin and Ramsey LRT corridors are significant.

The BRW team is committed to completing the work program on time and to providing a planning process that is unique to Ramsey County, but still reflects the necessary regional context.

Sincerely,

BENNETT-RINGROSE-WOLSFELD-JARVIS-GARDNER, INC.

Richard P. Wolsfeld, PE, AICP
Principal

RPW/jkf
enclosure

DAVID J. BENNETT
DONALD E. HUNT

MINNEAPOLIS

DONALD W. RINGROSE
MARK G. SWENSON

RICHARD P. WOLSFELD
JOHN B. McNAMARA

PETER E. JARVIS
DONALD L. CRAIG

DENVER

LAWRENCE J. GARDNER
RICHARD D. PILGRIM

THOMAS F. CARROLL
DALE N. BECKMANN

CRAIG A. AMUNDSEN
DENNIS J. SUTLIFF

PHOENIX

INTRODUCTION

The successful completion of the "LRT Planning Analysis in the Midway Corridor" project will require the attainment of the following objectives:

- o to gain consensus on the alignment, scope, and timing of LRT service
- o to gain concurrence on a financial plan for the preferred alternative
- o to determine if preliminary engineering should be initiated in the corridor
- o to involve affected agencies and parties in the decision-making process
- o to establish a working team with RTB staff, RCRRA staff, and other agency staffs
- o to complete the work by February 21, 1988

This proposal briefly describes the approach proposed to accomplish the above objectives.

PROJECT ORGANIZATION

The attached figure presents the expected Decision-Making Organization/Information Flow for the project. At the beginning of the project, BRW would meet with RTB and RCRRA staff to clearly define the roles of the various participants in the study, including the role of the consultant. BRW feels it is important to define whether the consultant's role is to provide technical analysis and evaluation, provide opinions on transit philosophy, or provide strong recommendations on location and design.

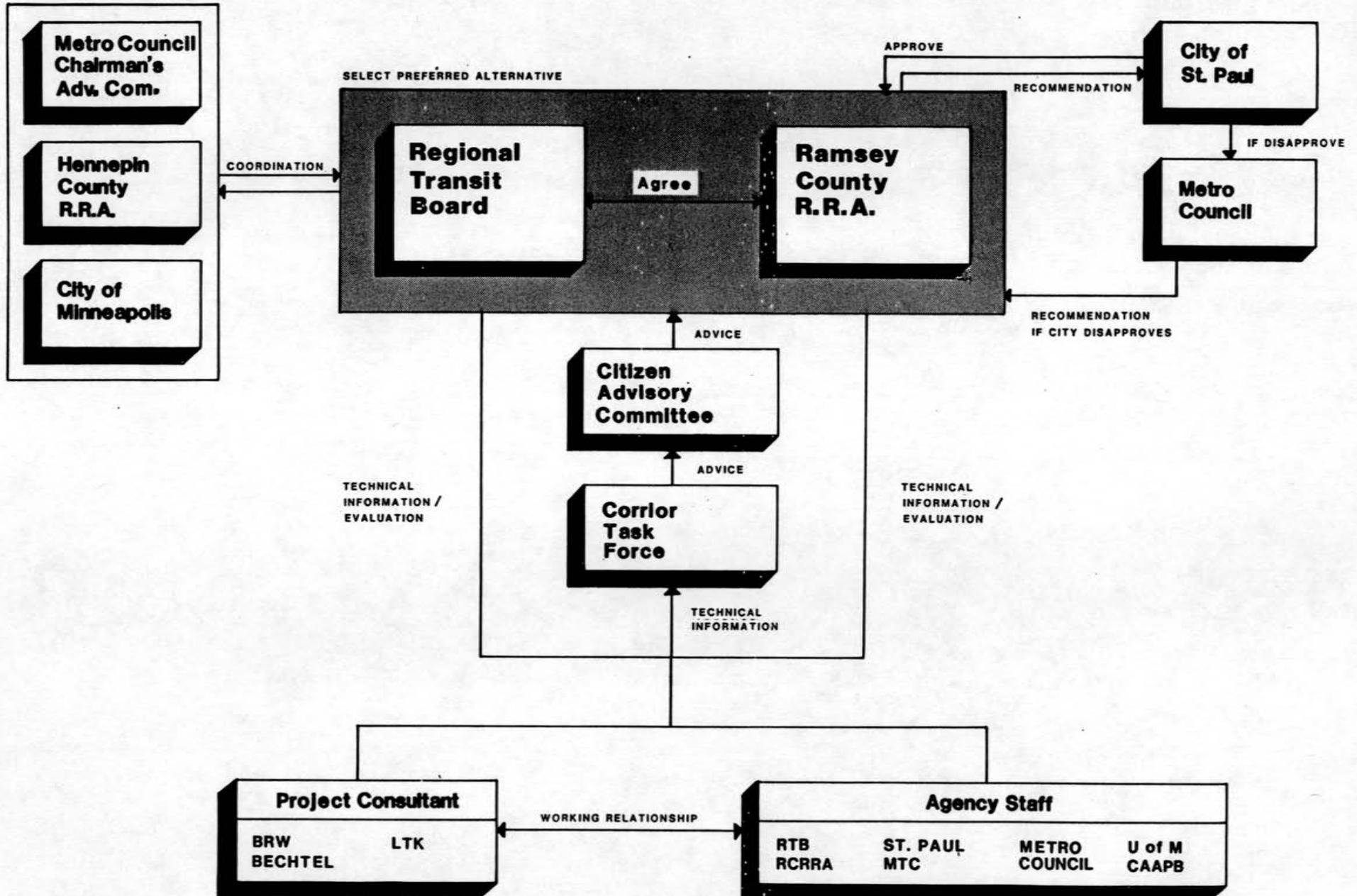
PROJECT APPROACH

BRW believes that the way the following issues are resolved is important to the successful completion of the project within the short time available.

- o Decision-Making Process: The decision-making process needs to be clearly defined. The roles of advisory committees and the relationship between the cities, RTB, RCRRA, Metropolitan Council and others in the decision-making process needs to be established early to meet the schedule.
- o Relationship to Hennepin County Planning: The potential areas of mutual interest include matching of the physical alignments in Ramsey and Hennepin County, the location of yards and shops, the staging of improvements and the operating standards and policies. BRW, the RTB and Ramsey County need to review the work done for Hennepin County and decide what elements to use for the Midway corridor.

DECISION PROCESS / INFORMATION FLOW

Draft



- o Transit Philosophy: The decision makers need to develop a philosophy on what they want to accomplish with light rail transit service in the corridor. That is, do they want to have a higher-speed line serving trips to and between St. Paul and Minneapolis with fewer stops, in a railroad alignment, or do they want to have a lower-speed line on University Avenue that would be easier to walk to, have more frequent stops and serve trips between intermediate points on the line. The Transit Philosophy may be a product of the study.
- o Role of Consultant: There are three possible roles of the consultant in this study: 1) to provide technical information and technical evaluation, 2) to provide an interpretation or opinion on the technical evaluation, and 3) to provide a strong recommendation based on the technical evaluation. The RTB and Ramsey County need to define which of these roles the consultant should take. BRW can work in any of these roles.
- o Railroads: A railroad committee made up of staff from the Burlington Northern, Soo Line, and Chicago Northwestern railroads and MnDOT has been formed for the Hennepin County light rail studies. This committee is meeting on January 13, 1988, to provide information on the status of railroad operations on various segments of their tracks which have been identified on a map. BRW would propose to add the segments being considered in Ramsey County for discussion at the January 13th meeting.
- o Financing: Hennepin County already has a financing committee investigating the productivity of alternative revenue sources. BRW feels that there is no reason to duplicate this effort.
- o Product: One of the products of this study is the review and evaluation of alternative alignments with a recommendation on the preferred alignment. BRW has learned on other corridor studies that there is always a strong desire for more detailed information on which to base decisions. The consultant needs to provide the right technical information to decision makers but also needs to remember that the study is not a preliminary engineering study.

WORK TASKS

Task 1.0 Review, Evaluation and Selection of the Preferred Alignment

There are four alignments which will be reviewed: two northern or Burlington Northern railroad alignments, the University Avenue alignment and a southern or Shortline railroad alignment. Downtown St. Paul alternative alignments will also be examined.

A two screen evaluation process is proposed. The preliminary screen would be used to narrow the initial set of alternatives from four down to two for detailed evaluation. A preliminary definition of feasible downtown St. Paul alternative alignments may be used as a criterion for screening of the corridor alternatives. The

downtown St. Paul alternative alignments would be evaluated separately from the alignment alternatives in the corridor. The interface between the downtown alternative alignments and the corridor alternative alignments may be an evaluation criterion in both selection processes. The work program description below is based on the above process. The data collection, base mapping, presentation graphics and meetings are assumed to be part of the subtasks defined below:

1.1 Corridor Screen I Evaluation

- o Definition of Screen I Evaluation Criteria. Potential Criteria include: availability of ROW, ridership, land use impact, land availability for stations or park and ride lots, capital cost and bus system changes.
- o Definition of Characteristics of Universe of Corridor Alternatives. In addition to alignments and station spacing the general characteristics of alternatives relative to screen I evaluation criteria would be defined. Evaluation would focus on fatal flaws or significant advantages or disadvantages.
- o Narrow Alternatives. It is anticipated that two alternatives will be selected for detailed evaluation, an alignment in a railroad right-of-way and one on University Avenue.

1.2 Corridor Screen II Evaluation

- o Definition of Screen II Evaluation Criteria. Potential criteria would include those in Screen I plus development impacts, traffic impacts, impact on transit dependent, travel times, safety, construction impacts, and any other critical issue related to the screened alternatives.
- o Definition of Characteristics of Remaining Alternatives. Potential alignments would be defined in greater detail, station locations identified, and operational characteristics identified. Other characteristics of the alternatives relative to the evaluation criteria would be identified.
- o Recommendation on the preferred alignment. This task will involve development of a summary of the evaluation against the criteria and preparation of a draft memorandum on the preferred alignment location and reasons for recommendation.

1.3 Capital Area/Downtown St. Paul Evaluation

- o Definition of Evaluation Criteria for Downtown alternatives. The evaluation of downtown alternatives needs to interrelate with the evaluation of the corridor alternatives.

- o Definition of Characteristics of Downtown Alternatives. In addition to alignment and station locations the characteristics of the alternatives relative to the criteria will be defined.
- o Recommendation on Preferred Alignment. Preparation of a draft memorandum on the preferred alignment location and reasons for recommendation.

1.4 Final Report

Task 4.0 Scoping of Financial Feasibility Alternatives

This task will involve the completion of a two by two matrix which matches public and private funding sources against capital and operating costs. Miller Schroeder, a financial consulting firm, has prepared a list of possible funding sources (including private, local, county, state and federal sources) and their productivities for Hennepin County. Most of this data is applicable to the Midway corridor. The major part of this task will be to select the appropriate combination of public and private funding sources and productivities which will meet the projected capital and operating requirements. BRW proposes to test several combinations to assist the RTB, RCRRA, and others in selecting the appropriate combination.

PROJECT STAFFING

The proposed BRW team is currently assisting Hennepin County in the development of a Comprehensive LRT System Plan. The analyses for several of the corridors under study in Hennepin County have been completed and the advisory committees have developed their recommendations on alignment and station locations. BRW proposes to combine the project teams from the University Connector and Southwest corridors to work on the evaluation of alternative alignments in the Midway corridor. Below is a brief description of each of the project team members and their applicable experience. A project team chart and resumes for each of the project team members are included in the Appendix.

Richard P. Wolsfeld will serve as project director. He will provide overall project technical direction. Mr. Wolsfeld will also have responsibility for making presentations to the RCRRA, RTB, advisory committees and others and will have responsibility for scoping the financial feasibility of alternatives. Mr. Wolsfeld is currently the project manager for the Hennepin County Comprehensive LRT System Plan and was project manager for the 1985 Light Rail Transit Implementation Planning Program for the Twin Cities Metropolitan Area.

Anthony J. Heppelmann will serve as project manager. Mr. Heppelmann will be responsible for coordinating and directing the daily work activities of the project team. He will also have responsibility for the impact analyses and report preparation. Mr. Heppelmann will work closely with RTB, RCRRRA, and City of St. Paul staff in coordinating the specific work activities. Mr. Heppelmann served as project manager for the University Connector corridor which has completed their work and assisted in the evaluation of alternatives in downtown Minneapolis.

David M. White will have responsibility for definition of alternative alignments including termini, station spacing and station locations. Mr. White was Bechtel's project manager on the transportation alternatives analysis for the University and Southwest corridors prepared for the Metropolitan Council.

John Schumann of LTK Engineering will have responsibility for defining operational constraints and impacts of the alternative alignments. Mr. Schumann has an extensive background in Light Rail Systems and is responsible for defining the operating standards and policies for the Hennepin County Comprehensive LRT System Plan.

Bechtel Civil, Inc. will have responsibility for developing operational and capital cost estimates. Esa J. Rasi, a senior estimator for Bechtel, will have the primary responsibility for the preparation of cost estimates. Bechtel will also provide a trackwork and alignment engineer to review and provide input on proposed alignments. Bechtel was responsible for the capital and operating cost analyses for the University/Southwest alternatives analysis and is currently working on capital and operating cost estimates for the Hennepin County corridors.

BRW professional staff that will be working on the project are also shown on the project team chart. These people have worked on the University and Southwest corridors and represent several professional disciplines, including urban land use planning, engineering, architecture, landscape architecture, and transportation planning.

EXPERIENCE AND QUALIFICATIONS

BRW, Inc., is a multidisciplinary consulting firm of approximately 305 employees with major offices in Minneapolis, Denver and Phoenix. BRW was founded in 1956 and offers services in four professional areas: transportation, engineering, architecture and planning. BRW has worked on a variety of projects for both public and private sector clients. BRW's full-time professional staff includes traffic engineers, civil and structural engineers, architects, landscape architects, urban planners, and air quality and noise analysts. BRW has significant experience in LRT planning and alternatives analysis, especially in the Twin Cities Metropolitan area. BRW is presently assisting Hennepin County in the development of a Comprehensive LRT System Plan. Other related projects which BRW has completed include:

- o The Hiawatha Avenue Alternatives Analysis and Location and Design Studies, which included an analysis of HOV lanes and light rail alternatives in the corridor.
- o The Light Rail Transit Implementation Planning Program for the Twin Cities Metropolitan Area. This study integrated the work previously completed in the Hiawatha Corridor, the University Avenue Corridor and the Southwest Corridor into a common physical definition, capital cost estimate and construction staging program. The study also developed a construction financing plan and a construction management plan.
- o The Long Range Transit Analysis for the Twin Cities Metropolitan Area, a Study of Potential Transit Capital Investments in Twin Cities' Corridors. This study evaluated the need for transit capital investments along major transportation corridors and established regional priorities among them.

BRW's Project Team also includes Bechtel Civil, Inc. and LTK Engineering Services. Both firms have extensive light rail transit experience. Bechtel was responsible for the capital and operating cost analyses for the University and Southwest Transportation Alternatives Analysis prepared for the Metropolitan Council. Bechtel and LTK are currently working with BRW on the Hennepin County light rail studies. A summary of Bechtel and LTK light rail transit projects and planning experience is included in the appendix.

PROJECT BUDGET

The project budget estimate including person-hours by task, hourly rates, classifications, equipment and expenses is summarized on the following page. The estimated project cost is \$87,570.00.

PROJECT TIMELINE

A project schedule for completion of each of the work tasks to meet the February 21, 1988 target for selection of a preferred alignment is shown following the project budget.

AFFIRMATIVE ACTION AND DBE/WBE PARTICIPATION

BRW presently employs 298 people in three offices; 68 female (6 are Black, Hispanic or Asian), and 230 male (9 are Black, Hispanic or Asian). A detailed chart showing staff composition is included in the Appendix. BRW will make every reasonable effort to subcontract the printing and report production to a DBE/WBE firm.

PROJECT TIME SCHEDULE



Corridor Screen I

- Define Evaluation Criteria
- Define Characteristics of Alternatives
- Narrow Alternatives

Corridor Screen II

- Define Evaluation Criteria
- Define Characteristics of Alternatives
- Preferred Alignment Recommendation

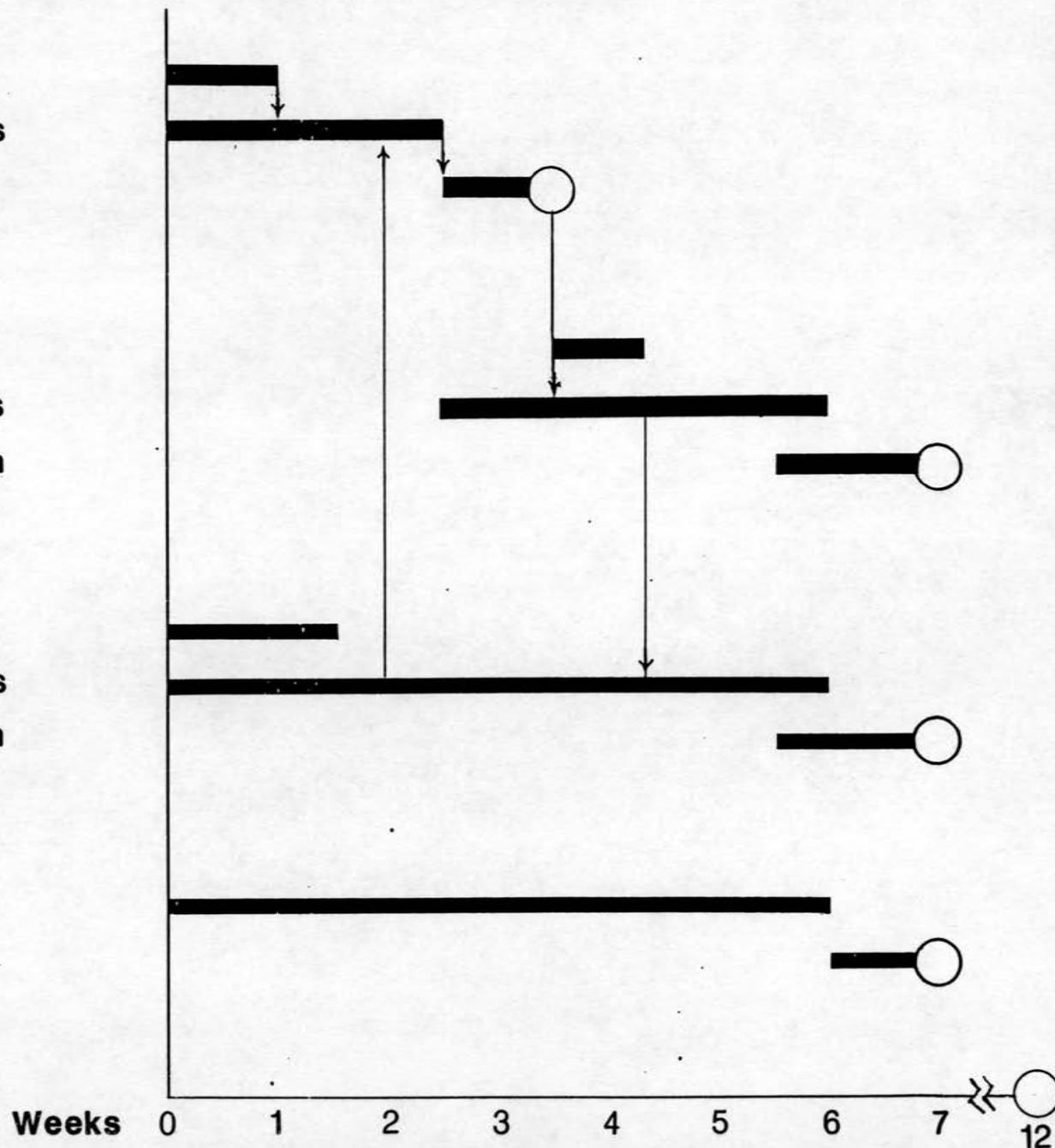
Capital Area/Downtown St. Paul

- Define Evaluation Criteria
- Define Characteristics of Alternatives
- Preferred Alignment Recommendation

Capital and Operating Financial Plan

- Financing Mechanisms
- Financial Plan

Final Report



REGIONAL TRANSIT BOARD

Suite 270 Metro Square Building, Saint Paul, Minnesota 55101
292-8789

DATE: December 28, 1987
TO: Regional Transit Board
FROM: Linda L. Ehlers, Project Administrator *LEK*
SUBJECT: Metro Mobility Evaluation Report Discussion

The Metro Mobility evaluation consultants will be present at the January 4, 1988, board meeting to review and discuss policy options outlined in the draft summary report which you received in an earlier mailing. Please bring to the board meeting your copy of the document entitled, Executive Summary, Comprehensive Review and Evaluation of the Metro Mobility Program.

REGIONAL TRANSIT BOARD

Suite 270 Metro Square Building, Saint Paul, Minnesota 55101
292-8789

DATE: December 15, 1987
TO: Regional Transit Board
FROM: Mark Ryan, Senior Project Administrator
SUBJECT: Standards, Procedures and Guidelines for Competitive Procurement
of Public Transit Services

SUMMARY

This memorandum discusses the major comments that have been presented by the Competitive Transit Advisory Team and through the RTB's public hearing on proposed standards, procedures and guidelines for competitive bidding. The memorandum concludes with recommended changes to the proposed standards and requests the board to adopt the amended standards, procedures and guidelines.

BACKGROUND

An important part of the RTB's efforts to implement new service is the development of standards, procedures and guidelines for the RTB and recipients of RTB funding to follow when competitively procuring transit services. The development of standards, procedures and guidelines is also a critical step in the RTB's competitive transit study. Once the standards, procedures and guidelines are adopted, they will serve as RTB policy direction that will permit the procurement of transit services in a consistent and equitable manner by the RTB or recipients of RTB funding.

At the Policy Committee meeting on September 21, 1987, a report on the proposed standards from the RTB's Competitive Transit Advisory Team was presented and discussed. At the board meeting on October 5, a public hearing on the proposed standards, procedures and guidelines was set for October 21, 1987. The public hearing that was held on October 21, 1987, is part of a process that was outlined in legislation that specifies:

At least 60 days before adopting any standards, procedures or guidelines for competitive bidding of transit service, the board shall hold a public hearing on the subject. The board shall publish notice of the hearing in newspapers of general circulation in the metropolitan area not less than 15 days before the hearing. At the hearing, all interested persons must be afforded an opportunity to present their views orally and in writing. Following the hearing, and after considering the testimony, the board shall revise and adopt the standards, procedures and guidelines.

During the public hearing, three people addressed the board on the proposed standards. The board also received written comments from two members of the Competitive Transit Advisory Team, the Minnesota Charter Bus Owners Association and the MTC. The minutes from the public hearing and the written comments are included as Attachment I.

DISCUSSION

Throughout the discussion with the Competitive Transit Advisory Team and during the public hearing, three major issues were raised regarding the proposed guidelines; clarification of what the RTB will be bidding, payment of a prevailing wage and the appropriate method for representing costs. Each of these issues is discussed in more detail on the following pages.

Clarification of Bidding Activities

One of the comments made by the MTC on the proposed standards was a request that the RTB clearly specify which transit services are eligible for competitive bidding and which services are not. The RTB initiated its two-year competitive transit demonstration study in March of 1986. An important outcome of the study is to determine the appropriate role for competitive transit in the metropolitan area. One of the key work activities of the study will be to develop test cases and then conduct a Request For Proposals (RFP) process to competitively award the service. These test cases will permit the RTB to gain first-hand experience with competitively awarding transit services that will be critical to the RTB's assessment of the role for competitive transit in the metropolitan area.

The test cases that will be developed under the RTB's competitive transit study will be consistent with all existing RTB policies, Metropolitan Council policies and existing state legislation. Specifically, the test cases will be limited to services identified under the interim RTB/MTC performance standards (or other standards that may evolve), new or restructured services. During 1988, it is expected that three or four test cases will be developed and bid under the study. The competitive transit study will conclude in March 1989 with a comprehensive report detailing the results of the study and outlining recommended future policy direction for competitively awarding public transit services in the metropolitan area.

Prevailing Wage

Currently, the proposed guidelines do not address what type of a wage should be paid to drivers or others involved in providing the service. During the advisory committee's discussion of the guidelines and in the public hearing, the issue of requiring a prevailing wage to be paid was raised. Some have expressed concern that without a requirement to pay a prevailing wage, providers may pay their drivers and others at the minimum wage. Also stressed, was the concern that quality service could not be provided for less than the prevailing wage.

Others have expressed the concern that the public may not be best served by establishing a prevailing wage. With more public transit funding going to pay for wages, fewer dollars will be available to expand service and to serve the unmet needs in the metropolitan area. Also stressed was the opinion that providers have to offer a competitive wage in order to attract people to work for them.

The concerns that have been raised about service quality are important and are addressed in the proposed guidelines. Under the Requested Scope of Work section on page 6 of the proposed guidelines, the need to specify minimum personnel requirements and a comprehensive driver's training program is outlined. Additionally, on pages 18 and 19 of the Minimum Contract Provisions section, the need to address performance measures in the contract is summarized in the service criteria section and in the discussion of incentives and penalties.

Presentation of Costs

A third issue that has been raised by the MTC is the manner in which proposed costs for the service are to be represented. The proposed standards state that the decision to select a provider should not be based solely on the proposed cost, but also on other factors such as related experience, financial ability, vehicle condition, and driver training programs. The proposed guidelines contain a section that describes how costs are to be presented that permits equitable competition among providers. Specifically, the guidelines propose that all providers represent all direct and indirect operating costs associated with providing the service, plus a full allocation of capital costs, regardless of how the capital assets were acquired.

There are two issues on this topic that have been raised and are outlined below:

1. It will be difficult to verify that a private company is including fully allocated costs in their proposed price.
2. Only those costs that are increased when service is added should be included in the proposed price for the service. If fixed costs do not increase with the service, then they should not be included in the proposed price.

The two most discussed options for making costing decisions are outlined below:

| <u>Type of Cost</u> | <u>1</u> | <u>2</u> |
|---------------------|----------|-------------------|
| Operating | 100% | Marginal (75-85%) |
| Capital | 100% | Marginal (0-100%) |

Option 1 represents the method proposed in the guidelines to present and evaluate providers' costs; 100 percent of all operating costs associated with providing the service plus 100 percent of the capital costs are required to be included in the proposed price. This is also the method by which UMTA requires costs to be presented and used for comparison purposes. The UMTA policy then permits a local decision on how costing decisions should be made.

Option 2 represents a marginal costing approach where only those costs directly associated with the service up for bid are presented in the bid price. Under this approach, operating costs may represent 75-85 percent of all operating costs associated with providing the service, while no capital costs would be included when the service is provided with existing vehicles and up to 100 percent of the capital costs would be included when vehicles are acquired for the service.

A marginal costing approach only requires the provider to present the direct expenses that are associated with the service. Examples of these types of expenses are listed below:

- o Fuel/lubricants
- o Labor/benefits
 - Drivers
 - Mechanics
 - Other direct labor
- o Vehicle parts
- o Tires

A fully allocated costing approach requires providers to present the direct expenses that are attributable to the services, plus an equitable share of all fixed costs. This would include the expenses represented in a marginal costing approach, plus an equitable share of the fixed costs attributable to the services up for bid. Examples of fixed costs are presented below.

- o General Administration
- o Clerical
- o Risk Management
- o Utilities
- o Human Resources
- o Office Maintenance
- o Financial Services

The following issues have been raised with each of these approaches.

1. A marginal costing approach does not recognize all costs associated with providing the service.
2. If a capital asset is funded with federal grants, then only the local share that was used to fund the capital asset should be included in the proposed price.

3. If a provider is awarded a contract based on marginal costs and that provider's only other transit services are deficit funded by the RTB, then service provided under the marginally costed contract would be purchased at a much lower rate. Therefore, providers with existing deficit funded contracts with the RTB will have an advantage since their fixed expenses are already being paid by the RTB. If providers with existing deficit funded contracts with the RTB are required to follow a full allocation cost policy, then all costs attributable to the service will be shared equitably under all contracts.

4. A marginal costing approach will result in lower costs over a short term period. If service is consistently awarded to a provider based on marginal costs, eventually a bidding situation will occur where the provider will have to add to their fixed expenses and include that cost in the bid price. This will result in the provider being forced to submit a disproportionately higher bid than what the service actually costs. This point is illustrated by a hypothetical example below.

| | <u>Variable Costs</u> | <u>Fixed Costs</u> | <u>Total Bid Price</u> |
|-------------|---------------------------|------------------------|----------------------------|
| Bid 1 | \$ 287,000 | \$ 0 | \$ 287,000 |
| Bid 2 | \$ 164,000 | \$ 0 | \$ 164,000 |
| Bid 3 | \$ 250,000 | \$ 0 | \$ 250,000 |
| Bid 4 | \$ 390,000 | \$ 0 | \$ 390,000 |
| Bid 5 | \$ 276,000 | \$ 45,000 | \$ 321,000 |

A fully allocated cost approach includes a share of fixed costs attributable to the service to be bid. This point is illustrated by another hypothetical example below.

| | <u>Variable Costs</u> | <u>Fixed Costs</u> | <u>Total Bid Price</u> |
|-------------|---------------------------|------------------------|----------------------------|
| Bid 1 | \$ 287,000 | \$ 10,700 | \$ 297,700 |
| Bid 2 | \$ 164,000 | \$ 7,800 | \$ 171,800 |
| Bid 3 | \$ 250,000 | \$ 6,200 | \$ 256,200 |
| Bid 4 | \$ 390,000 | \$ 11,000 | \$ 401,000 |
| Bid 5 | \$ 276,000 | \$ 9,300 | \$ 285,300 |

One other consideration to discuss is the recent action by the board on how costs are to be represented in cost-sharing arrangements. In applying the recently adopted cost-sharing guidelines towards operating costs, the guidelines require cost sharing arrangements to be based on 100 percent of the operating costs attributable to the service. For capital costs, the cost-sharing formula is based on the local share of funding that has been used to acquire a capital asset.

FINDINGS AND CONCLUSIONS

- o One of the key work activities of the RTB's competitive transit study will be to develop test cases and then conduct a Request For Proposals (RFP) process to competitively award the service.
- o The test cases developed under the RTB's competitive transit study will be limited to services identified under the interim RTB/MTC performance standards (or other standards that may evolve), new or restructured services.
- o The RTB's competitive transit study will conclude in March 1989 with a comprehensive report detailing the results of the study and outlining recommended policy direction for competitively awarding public transit services in the metropolitan area.
- o During the advisory committee's discussion of the proposed guidelines and at the public hearing there was both support and opposition to a policy that would require providers to pay a prevailing wage.
- o The need to include minimum personnel requirements, a driver's training program and the need to address certain performance measures in the competitively awarded contract is addressed in the proposed guidelines.
- o One of several factors considered when evaluating providers for competitively awarding transit services is their proposed cost to operate the service.
- o Marginal costing will result in a lower cost over the short term and higher costs in the long term. The amount of service that is bid will determine when fixed costs will appear in a bid price.
- o A fully allocated cost approach recognizes all costs associated with providing the service.
- o Marginal costing will lead to a provider charging the RTB different rates for similar services.
- o The RTB's recently adopted guidelines on cost sharing require cost sharing arrangements to be based on 100 percent of the operating costs attributable to the service plus the local share of funding that has been used to acquire a capital asset.

RECOMMENDATION

That the proposed standards, procedures and guidelines be adopted by the board with the following changes:

1. That providers receiving ~~100%~~ deficit funding from the RTB be required to represent their proposed costs in accordance with the following guidelines:
 - 100% of all operating costs attributable to the service are to be included in the proposed price; plus
 - 100% of the local cost for any capital assets used in providing the service.
2. Providers that do not receive 100% deficit funding from the RTB, shall not be required to represent their fully allocated costs.
3. When a provider receiving ~~100%~~ deficit funding from the RTB submits a proposal to an RFP issued by either the RTB or one of its recipients, the provider shall also separately submit to the RTB a complete summary of their fully allocated costs and their marginal costs. This information shall then be reviewed as part of the RTB's competitive transit study.

CGA

Discussion Agenda

**Regional Transit Board
Policy Committee**

January 4, 1988

Carter Goble Associates, Inc.

METRO MOBILITY

The Metro Mobility (MM) system compares favorably with other similar systems in quality of service delivery, volume of service delivery, cost, and rider acceptance. As discussed with the Board at a previous meeting, rider satisfaction is considered well above normal. The following table illustrates the success of the Metro Mobility system when compared with similar systems.

| |
|---|
| <p>Metro Mobility Service Volume and Cost</p> |
|---|

| System | Cost/Trip | | | Conditions |
|----------------------|-----------|---------|---------|---------------------------------|
| | User Fee | Subsidy | Total | Equal % of Fewer Trip Delivered |
| Metro Mobility 1986 | \$1.15 | \$9.69 | \$10.84 | .254 |
| Metro Mobility 1987 | \$1.00 | \$7.31 | \$ 8.31 | 1.000 |
| Milwaukee, Wisconsin | \$2.00 | \$8.20 | \$10.20 | .660 |
| Chicago, Illinois | \$.90 | \$14.65 | \$15.55 | .809 |

As the above table indicates the 1987 Metro Mobility system provided service at a 30.45% less cost than the 1986 Metro Mobility system and less than other nearby systems. The last column of the table shows the fewer percent of trips that the other programs would have delivered per square mile if they operated under the cost parameters of the 1987 Metro Mobility program. From this last column it is clear that when taking into account the size of the Metro Mobility service area, and the per trip cost, none of the other systems compare.

Information obtained by the consultant through interviews and data collection indicate that not withstanding, the cost

comparisons presented above, system effectiveness, and integrity improvements are needed.

PROGRAM IMPROVEMENT RECOMMENDATIONS

I. Program Management Organization

Issues:

- Concentrate the role of the RTB in planning and program oversight.
- The MMAC should assume all day-to-day operational and management responsibilities.
- The RTB should have a direct contract with the entity managing the MM program (MMAC).

Recommendations:

- The RTB staff's role should be the short and long term planning; programming; program oversight; and, budgeting of the MM program. The RTB should not be involved in the day-to-day operation and management of the MM service system.
- The RTB should contract directly with the MMAC eliminating any future role by the MTC in the management of the MM program.
- The RTB contract with the MMAC should include the delivery of all MM day-to-day responsibilities.
- The role of the MMAC would be procured like any other professional service. The RTB would solicit proposals from interested and qualified entities and select the best qualified proposal.

II. Communication

Issues:

- The RTB Board and staff must feel comfortable that they have direct and continuous channels to the needs and concerns of the programs' participants. Such channels will ensure the accuracy of the Board's policy

discussions, and the staff's short and long term planning, programming and budgeting discussions.

- There must be an established procedure and forum for issue presentation to the Board.
- The MMAC, as the central focus for day-to-day operations, must have open communications with the users and providers to ensure program effectiveness and efficiency.
- The providers and users must be given an established channel to voice their opinions to the MMAC and directly to the RTB.
- The advocacy groups and the general public must be given opportunities to express their opinions to the RTB.

Recommendations:

- The contractual relationships between the RTB and the MMAC, and between the MMAC and the providers be adjusted as presented in section I above.
- The RTB should formalize the existing advisory committee structure as follows:
 1. METRO MOBILITY EXECUTIVE ADVISORY COMMITTEE (MMEAC)
 2. TRANSPORTATION HANDICAPPED ADVISORY COMMITTEE (THAC)
 3. METRO MOBILITY PROVIDERS ADVISORY COMMITTEE (MMPAC)
- An Annual Public Hearing Procedure Should Be Established

III. SERVICE OPTIONS

Issues:

- The ridership densities throughout the MM service area are markedly different ranging from rural to urban.

- Ridership densities can be grouped into two basic service areas which respect the existing service design for the urban area and offers a unique service design to respond to the handicapped transportation needs of the rural areas.
- Existing provider resources exist in the urban and rural areas of the Region which should be fully utilized.
- Service delivery for all transportation services, especially those of the handicapped transportation programs, in the MM program area and the Exurban areas need to be coordinated together.

Recommendations:

- To divide the MM service area into two service areas (Area I and Area II) based upon ridership density.
- Ridership density shall be displayed in the number of vehicles needed to provide MM service to the area analyzed.
- Area I service be provided under the existing methodology.
- Area II service be provided by a designated provider for each sub-part of the area. The sub-parts would be determined by trip pattern characteristics. The RTB would direct the MMAC to solicit proposals from qualified providers in each designated sub-part of Area II.
- The origin of the user will determine which provider is assigned to each user. This will permit providers to cross sub-part and Area boundaries to access destinations and provide the return trips.
- All users certifications would need to be reassessed to determine the users classification in Area I or Area II.
- The Board should instruct the MMAC to begin the Area I and Area II service for existing certified users no later than April 1, 1988. Service for Phase II users should be offered no later than May 1, 1988.

SYSTEM INTEGRITY

I. REIMBURSEMENT RATES

The present reimbursement rates do not reflect true costs associated with delivering handicapped services in the MM service area. This does not mean that reimbursements are too high or too low but that reimbursements need to be more closely tied to services rendered.

Recommendations:

- ° The rate structure should be built from the base "curb-to-curb" rate for service. This rate should reflect the average cost of delivering service plus a reasonable profit, no extras offered. We believe this base rate is similar to the rate now used. The base rate should be formulated based on the use of vans or buses, and be reduced when cars are used to deliver service.
- ° The rate structure should reimburse providers for the extra/special services they render. These extra or special services should be valued at the cost to the provider for delivering them. Such services include door-to-door, station-to-station, wheelchair and amigo service.
- ° The rate structure for Area I and Area II should be identical except for the base rate. The base rates should be different due to the average trip distances expected in Area I versus Area II. Area I's base rate should provide for trip distances up to 10 miles in length while Area II's base rate should provide for trip distances up to 20 miles.
- ° Reimbursement for guest travel must give the providers payment for all guests above one. This expense should be the responsibility of the rider.

- The providers should be reimbursed for aides or escorts which travel with those users who are certified to need an aide or escort. The MM program should reimburse the providers for such an aide or escort trip in the same way and amount it would for the certified user's trip.
- Due to the unique configuration of amigos, special payment by the user should be required to assist in covering the liability of transporting a piece of equipment for which no restraint system has been designed and tested.

II. ADMINISTRATIVE AND REGULATORY CHANGES

Issues:

- Due to the ease of consistently serving the same Type of user and the higher level of reimbursement from the MM program, many providers are concentrating their service on the non-ambulatory user and are not serving the ambulatory user.
- Due to the higher productivity rates possible by concentrating service on group trips, many providers have reduced their potential to serve individual users. The MM reimbursement per vehicle trip, under the present reimbursement structure when twenty users can be transported at one time, is so lucrative that all providers are sure to seek more and more group trips.
- Under the existing operating procedures it is difficult to monitor how many trip requests a provider may refuse or refer and even more difficult to determine why a refusal or referral occurred. Additionally, there is no way to require a provider to schedule long distance trips or to transport clients going to destinations other than that of the provider's address.
- There are no existing rules to control the dumping of riders onto the MM system from existing human service systems. Since this practice has become common place all human service programs whose clients would qualify for transportation under the MM program are surely considering disbanding their transportation systems and receiving transportation services via the MM program. If not considering disbanding their system some are

considering becoming a provider under the MM system and merging their clients into the MM program.

Recommendations:

- The RTB Board should determine whether it wishes to allow providers to concentrate on serving the non-ambulatory user. The consultant sees nothing wrong with this practice under the proposed reimbursement schedule.
- Control must occur over the natural tendency of the free market place to increase the volume of the more profitable group trip type of service. The consultant believes that the new rate schedule will reduce the profitability of group trips while still rewarding the provider's efforts to improve productivity. Regulations are also needed to limit the concentration of providers in the group trip market.
- New operational and management procedures will respond to the possible misuse of the provider's right to refuse or refer service. Procedures are recommended to ensure service to users in Area I, which are denied service from three or more providers. A user denied service would call the MMAC and the MMAC, rotating among all providers in the service area ~~area~~, would assign the trip to a provider. The 1988 contract would give this authority to the MMAC. The provider would not be allowed to refuse the responsibility of delivering the trip. Area II providers should not be allowed to refuse trips.
- The MM program should seek the financial support of those human service agencies that plan to dump clients on the MM system. The supplanting of financial commitment should not be allowed to continue. The problem, however, is not the responsibility of the RTB alone. The Governor and General Assembly should be advised of this problem and asked to assist the RTB in resolving the problem. For example, When such supplanting can be documented the State could adjust the budget of the involved human service agency equal to the supplanting of the transportation expense.

III. GROWTH - SHOULD THE GROWTH BE CONTROLLED AND IF SO, HOW?

Issues:

- The system has grown from 685,000 trips in 1986 to 775,602 trips in 1987, a 13.2% increase.
- This growth represents an increase of more than two million dollars in the MM programs budget for 1987.
- The MM program has not shown the full impact of adding the Phase I area to the system and still has the Phase II area to add. These two service areas will add additional ridership demands on the system.
- The consultant believes that the increased ridership has increased the productivity of the providers but no corresponding cost-per trip savings have been experienced by the RTB. Reductions in the per trip cost will not be possible until accurate data is collected which identifies the average vehicle hours and miles that are required to transport a MM rider. This information will justify annual rate changes tied to true cost.
- Responding to the legislative mandate to provide handicapped service to the total tax district, the RTB is faced with the certain prospect that use of the system will continue to grow. The consultant estimates that ridership potential for the entire service area for 1988 ~~is~~ should be 1.5 million.

Recommendations:

- The RTB should not view growth as a negative event. Growth is not necessarily a drain on the resources of the MM system if it brings improved productivity, and the corresponding reduced trip costs, and additional revenue sources from agencies serving handicapped clients. Refer to recommendation above.
- The following matrix rates the impact of a variety of possible actions which could be implemented to control cost/growth in the MM program.

504
 IMPACT OF GROWTH/COST CONTROLLING OPTIONS

| ACTION | COST (3) | SYSTEM GOALS (3) | RIDERSHIP (1) | COMPLAINT (2) | IMPACT (WEIGHT) | 504 COMPLIANCE | STATE LAW COMPLIANCE | RECOMMENDATIONS |
|--|----------|------------------|---------------|---------------|-----------------|------------------|----------------------|--|
| Minor Fare Increase (\$.25) | 3 | 0 | 2 | 2 | 7 (15) | Yes | Yes | Revenue increase of \$200,000 would be worth negative impact. |
| Moderate Fare Increase (\$.50) | 3 | 0 | 2 | 2 | 7 (15) | Yes | Yes | Revenue increase of \$400,000 would be worth negative impact. |
| Major Fare Increase (\$1.00) | 3 | 2 | 2 | 2 | 9 (21) | Yes | Yes | Revenue increase of \$800,000 would not be worth negative impact. |
| Limit Rides Per Certified User (10 per week) | 3 | 2 | 2 | 2 | 9 (21) | If Above 3% Req. | Not Sure | Would reduce trip demand of excessive use; could be implemented with little negative impact. |
| Limit Service To Fixed Route Service Area | 3 | 2 | 2 | 2 | 9 (21) | Yes | No | Would have impact on service area and be in conflict with State law. |
| Limit Rides To Trip Priorities | 4 | 2 | 1 | 1 | 8 (21) | If Above 3% Req. | No | Would provide a basis to control cost, but would not comply with State law. |
| 48-Hour Trip Requirement | 2 | 2 | 2 | 2 | 8 (18) | No | No | Would have some impact on savings and be in clear violation of Federal and State laws. |
| Strict Adherence To 24-Hour Request Rule | 3 | 2 | 2 | 2 | 9 (21) | Yes | Yes | Would have some impact on savings, but would create complaints. |
| Stop New Certifications | 5 | 1 | 1 | 2 | 9 (23) | No | No | Would freeze growth, but would violate Federal and State laws plus system goals. |
| Stop Supplanting of Human Service Funds | 3 | 0 | 0 | 0 | 3 (25) | Yes | Yes | Could provide important volumes of revenues and control growth with no negative impact. |
| Set Program Ceiling | 5 | 0 | 1 | 2 | 8 (20) | If Above 3% Req. | Yes | Could freeze program growth; would not violate system goals, but would require careful drafting of implementing regulations. |
| Establish User Fees For Special Services | 3 | 0 | 2 | 2 | 7 (15) | Yes | Yes | Would add revenues in limited amounts with complaints from special interest groups. |
| Strengthen Certification Requirements | 3 | 3 | 2 | 2 | 9 (21) | Yes | Yes | Could reduce service to ambulatory; would change system expectations. |
| Provide Only Curb-to-Curb | 4 | 3 | 2 | 2 | 11 (27) | Yes | Yes | Would reduce cost and still allow equitable service |

KEY: Weights - 1 Low Importance, 2 Average Importance, 3 High Importance
 Raw Score - 0 No Effect, 1 Very Unfavorable, 2 Unfavorable, 3 Mediocre or Questionable, 4 Favorable, 5 Very Favorable

IMPACT OF GROWTH/COST CONTROLLING OPTIONS
Policy Committee Evaluation

| ACTION | COST (3) | SYSTEM GOALS (3) | RIDERSHIP (1) | COMPLAINT (2) | IMPACT (WEIGHT) | 504 COMPLIANCE | STATE LAW COMPLIANCE | RECOMMENDATIONS |
|---|-------------|------------------------|------------------|------------------|--------------------|-------------------|-------------------------|--|
| Minor Fare Increase (\$0.25) | | | | | () | Yes | Yes | Revenue increase of \$200,000 would be worth negative impact. |
| Moderate Fare Increase (\$0.50) | | | | | () | Yes | Yes | Revenue increase of \$400,000 would be worth negative impact. |
| Major Fare Increase (\$1.00) | | | | | () | Yes | Yes | Revenue increase of \$800,000 would not be worth negative impact. |
| Limit Rides Per Certified User (10 per week) | | | | | () | If Above 3% Req. | Not Sure | Would reduce trip demand of excessive use; could be implemented with little negative impact. |
| Limit Service To Fixed Route Service Area | | | | | () | Yes | No | Would have impact on service area and be in conflict with State law. |
| Limit Rides To Trip Priorities | | | | | () | If Above 3% Req. | No | Would provide a basis to control cost, but would not comply with State law. |
| 48-Hour Trip Requirement | | | | | () | No | No | Would have some impact on savings and be in clear violation of Federal and State laws. |
| Strict Adherence To 24-Hour Request Rule | | | | | () | Yes | Yes | Would have some impact on savings, but would create complaints. |
| Stop New Certifications | | | | | () | No | No | Would freeze growth, but would violate Federal and State laws plus system goals. |
| Stop Supplanting of Human Service Funds | | | | | () | Yes | Yes | Could provide important volumes of revenues and control growth with no negative impact. |
| Set Program Ceiling | | | | | () | If Above 3% Req. | Yes | Could freeze program growth; would not violate system goals, but would require careful drafting of implementing regulations. |
| Establish User Fees For Special Services | | | | | () | Yes | Yes | Would add revenues in limited amounts with complaints from special interest groups. |
| Strengthen Certification Requirements | | | | | () | Yes | Yes | Could reduce service to ambulatory; would change system expectations. |
| Provide Only Curb-to-Curb | | | | | () | Yes | Yes | Would reduce cost and still allow equitable service |

KEY: Weights - 1 Low Importance, 2 Average Importance, 3 High Importance
Raw Score - 0 No Effect, 1 Very Unfavorable, 2 Unfavorable, 3 Mediocre or Questionable, 4 Favorable, 5 Very Favorable

Carter Goble Associates, Inc.

COLUMBIA • ORLANDO • RALEIGH • WASHINGTON, D.C. • WEST PALM BEACH
1331 Elmwood Avenue, Suite 102, Columbia, South Carolina 29201



December 22, 1987

Mr. Robert Goble
Principal
Carter Goble Associates, Inc.
1331 Elmwood Avenue, Suite 102
Columbia, South Carolina 29201

Dear Mr. Goble:

The RTB staff has conducted a preliminary review of the draft final report, "Comprehensive Review and Evaluation of the Metro Mobility Program," which we received on December 7. First, our general reaction is the following:

- o We are pleased that this report provides more detailed analysis than previous reports, however, it is loosely organized and seems hastily written.
- o Some of the key recommendations are not well supported with facts and convincing analysis.
- o It is confusing whether some statements in the report represent the opinion of the consultant or that of Board members, providers, or others.
- o Some of the problems cited need to be defined or explained in more detail.
- o Data presented in tables need to be better integrated with text.
- o Paragraphs within chapters need to be organized in a more coherent manner, and it may be useful to highlight findings and conclusions at the beginning or end of each chapter.
- o An executive summary should be placed at the beginning of the report; this should provide a complete list of recommendations and the supporting rationale for each.
- o All reports issued by CGA should be clearly marked "DRAFT" until they are approved as final.

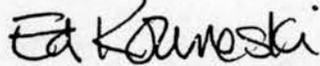
RTB staff has prepared more detailed comments, referenced by chapter, which are attached.

Robert Goble
December 22, 1987
Page 2

We recognize that the consultant team has conducted many interviews, covering a wide range of topics. From past conversations on-site, RTB staff was left with a sense that technical issues were being thoroughly investigated. The written report, however, fails to capture this. In some key areas, documentation and analysis are missing. Much of the information gathered in interviews is subjective and not verified. The report does not focus sharply on the issues that require priority attention.

Please advise me on the extent of rewriting that you are able to do.

Sincerely,

A handwritten signature in black ink that reads "Ed Kouneski". The signature is written in a cursive, slightly slanted style.

Edward Kouneski
Programs Manager

cc: Linda Ehlers
Judy Hollander

RTB Staff Comments

Section 1
SYSTEM OVERVIEW

| <u>Page No.</u> | <u>Comment</u> |
|-----------------|---|
| 1 | <p>The Metro Mobility program is rated well on service quality, ridership level, cost effectiveness, and rider satisfaction. From your evaluation, can you quantitatively assess safety performance, comparing the existing program to the former one or other systems?</p> <p>The table titled "Service Volume and Cost" compares 1986 and 1987 data. The 1986 data should be annualized pre-October, in order to compare the former and existing programs.</p> <p>The 1986 "user fee," or average passenger fare, of \$1.15 is not correct.</p> <p>The "percentage of fewer trips delivered" is a good statistic to show but should be clarified for readers to readily grasp what it means.</p> <p>In the last paragraph, you could acknowledge high degree of rider satisfaction along with favorable "cost comparisons."</p> |
| 2 | <p>Large increase in ridership is attributed to several factors including agency "dumping." Please provide data that show how much of the increase can be attributed to each of the factors cited. Avoid use of the word "dumping."</p> <p>References to 1986 data need to be clarified. We prefer to see a comparison of the former and existing programs.</p> <p>The last five sentences of the second paragraph need to be clarified; these conclusions should be supported with facts. Please describe in some detail the problems in "quality, safety, and timeliness of service" cited. Please explain what you mean by stating that the system was implemented "without the benefit of adjustment, information or opportunity." Please explain the "surprising financial problems" experienced.</p> |
| 3 | <p>You have recommended hiring an additional RTB staff person to assist project administration and, at the same, you have recommended delegating more authority and responsibilities to the Metro Mobility Administrative Center. Together, these seem inconsistent.</p> <p>You have observed that the RTB staff is "geared towards presentations and information updates" to the Board and that this consumes "a large amount of staff time." Please present findings that document this observation and also explain its relevance.</p> |

Page No.

Comment

- You state that "the MMAC manager also faces a problem of shifting priorities" but do not identify the priorities, and how or why they are shifting.
- 4 The issues listed on this page appear to be the views of Board members, although it is not clear. Are these statements of the consultant? If not, when referring to information gathered from interviews with Board members or others, please use quotation marks or distinguish the remarks in some manner apart from the text. Also, it would be useful to present the consultant's view: Are all of these issues legitimate, important? How are they being addressed in the evaluation?
- Consider presenting such interview summary information only in an appendix.
- 5 References to the various tables and sections in which reimbursement rates are addressed is confusing. The narrative needs to better explain the meaning of information contained in the tables.
- Elderly and disabled service is now provided in many of the Phase II communities, so ridership has already developed to some extent. Have you analyzed county program ridership to determine what proportion of existing ridership would be eligible for Metro Mobility? This could be useful to fine tune the forecast.
- 6 This table is not referenced in the text, seems out of order. Is the complaint count for 1986 pre-October, post-October, or for the entire year? Can you compare the number of complaints, by type, under the former program (pre-October) with those under the existing program?
- 7 Were other reimbursement structures considered? What assumptions about ridership, trip length, service productivity, and provider costs were used to derive the recommended structure?
- 8-16 The forecasts should be explained better in the narrative of the report and summarized in tables. Please place detailed information such as that contained in tables 1.4 through 1.8 in an appendix.

Page No.

Comment

Section 2
PROVIDERS

- 18 "Shadow cost" is not well defined. Metro Mobility funds appropriated from the state Legislature are not used to cover costs associated with RTB administration of the program.
- Case is not well made that Metro Mobility funds could be used more efficiently with fewer providers. Many providers do not rely on Metro Mobility as their sole line of business; it is merged into other transportation services they are providing. That practice achieves some economies.
- There may be legitimate reasons for the RTB to consider fewer providers, however, this evaluation finding, as it is presented, is not convincing. We need to see more analysis. What is the current service productivity; what level can be achieved with fewer providers? How does better productivity translate into direct savings to the RTB or more trips afforded?
- Better routing and scheduling of Metro Mobility riders results in "reduced costs and higher revenue" to the provider. Again, how is this benefit passed along to the RTB? Have you considered: If fewer providers are used, does it mean that the current reimbursement rates would not have to be increased at all? or to some lesser degree than that proposed.
- 19 Providers are currently able to charge \$2.75 extra, for trips over eight miles, that is, \$1.00 per mile up to a maximum \$3.75 per trip. Are you recommending \$1.25 extra in total or per mile? In other words, are you recommending that there not be a maximum charge per trip as there is now?
- Many providers are not charging the full amount they are entitled to. How can a reimbursement rate increase be justified when providers are not taking full advantage of the fare revenues available to them?
- Under the proposed reimbursement rate structure, how will system performance change? For example, what would be the average subsidy per trip, systemwide?
- 21 To support the statement "there seems to be no action being taken to resolve problems that the providers are voicing" it would be useful to identify the problems that have not been addressed by the RTB or the MMAC and to investigate the reasons.

Page No.

Comment

The statement that "the RTB needs to be more sophisticated and bring better technical knowldge and approaches to bear in dealing with Metro Mobility ... compared with past approaches" should be clarified. In what areas is technical knowledge lacking? Where have past approaches specifically failed?

Where is a "more logically situated" location for the MMAC than at the MTC?

You state that the MMAC, according to the providers, is "not delegated sufficient authority to totally manage the system." Please be specific. You have not explained here what additional responsibilities or authority, in the provider's view, need to be assigned to the MMAC.

The statement that providers are prohibited from doing "any public relations or marketing on behalf of the system" is false. Although the MMAC is responsible for system marketing, a provider can propose marketing activites and conduct them with approval. The MMAC's role is to ensure that accurate, consistent information is given about the system.

You say that "virtually no substantial promotion of the Metro Mobility system has been undertaken." Have you documented the public information activities which have been undertaken? A more basic question: Is there a need for substantial promotion of the system?

What data would providers like to receive in order "to analyze their services or how the total system is performing."

You say that providers claim problems of "not having suitable drivers" to ensure safe, quality service and of "not afford(ing) to pay higher wages due to the reimbursement structure." Please verify that this is a problem. What is the average wage for a Metro Mobility driver? Is it too low? Are providers experiencing high driver turnover? Are the wages paid to Metro Mobility drivers different from the wages paid to other drivers in comparable services, in the Twin Cities or in other metropolitan areas?

22

This page is a good example of how the writing is loosely organized. The transitions between paragraphs are abrupt. After operating data is presented on complaints, cancellations, no shows, and ridership, the topics change:

There are brief statements about the need to address contract issues and develop disciplinary measures.

In the next paragraph, a provider's advisory committee is recommended.

Page No.

Comment

Following that, it is recommended that the MMAC administer provider contracts, but no supporting rationale is given.

The next paragraph refers to a table listings vehicle specifications proposed for van conversion, but there is no analysis of how well the existing fleet currently meets these specifications.

The same paragraph states that all Metro Mobility providers are in compliance with the state rules for Special Transportation Services, however, this seems to be focused on driver training requirements.

Vehicle configuration and condition needs to be addressed in more detail in the text, particularly since the survey research showed some rider dissatisfaction with the types of vehicles deployed in Metro Mobility service.

- 23 There are some good suggestions made about how to monitor and enforce provider compliance with service standards, but much of the text that precedes this is disjointed.
- If the "complaints" statistic will be used to determine provider sanctions, more emphasis needs to be placed on how complaints are validated. Please address this.
- 24-28 The summary table is incomplete for some providers.
- 29 A matrix, with weighted variables, is proposed for the RTB to use for selecting providers. There is inadequate information presented about its development and how to use it.
- 30 Can you make statements about why average trip length varies by provider? How does it relate to service area and communities served?
- 32-35 Please summarize in narrative any findings and conclusions you have made from the data presented on these pages.
- 36-103 We would like to see the tables and graphs better integrated with text that explains what the data means. Please prepare a narrative analysis for each provider, preceded by one for the overall system.
- 104 Exhibit 2.1 "Specifications for Van Conversions" needs to be better integrated with text that explains why these are being recommended. If these standards are used in the new contracts, what would be the impact on current providers? How many of the vehicles now used for Metro Mobility service do not meet these standards? Should compliance with these standards be phased? Should we be concerned about the costs associated with van conversion or replacement?

Page No.

Comment

Section 3
METRO MOBILITY ADMINISTRATIVE CENTER

- 112 You have stated that the MMAC receives "limited assistance" from the MTC staff. Please clarify. It may be useful to investigate further the level of support that has been provided by the MTC departments: communications, information services, internal auditing, clerical services, human resources, and transportation operations (including the radio control center's role to arrange emergency pickups).
- Is it worthwhile to consider integrating the MMAC more fully into the MTC organization? If not, please explain why.
- If the MMAC were to be separated from the MTC and assigned responsibility for provider contracts, how would this affect MMAC staffing levels and administrative costs?
- You have not adequately explained the MTC "union contractual requirements alone (which) provide a barrier sufficient to restrict ... direct contractual arrangement(s)" between the MTC and the Metro Mobility providers. Please explain: "anticipated concern over MTC union contract provisions;" which provisions, specifically, are you referring to?
- 113 On this page, the reasons are more clear for assigning greater authority and contract management responsibilities to the MMAC. You suggest that "such authority requires strong leadership." Please elaborate.
- The statement that "non-enforcement of certain regulations places the whole program in jeopardy" needs to be clarified.
- You suggest that some regulations need to be re-evaluated, for example, standing orders. Can you make recommendations for changes in current procedures?
- 114 Have you quantitatively measured actual performance of the MMAC for certification timeliness; for example, the average time elapsed for applications to be processed.
- The MMAC's role in establishing "quality assurance techniques" is a good point to emphasize.
- 115 Are you suggesting that the Metro Mobility computer system, which was originally intended as a communications tool between the MMAC and providers, be used to "serve total company operational and financial needs" of all providers? If so, please explain why.

Page No.

Comment

You state the MMAC restricts advocacy groups from assisting "existing and prospective users in accessing the Metro Mobility system." Please explain. Specifically, what role would be appropriate for the advocacy groups (or even providers) to assume?

A "public relations campaign aimed at enhancing the image of the program" among riders and non-riders, alike, is recommended. What types of activities should be undertaken?

Section 4
COUNTY PROVIDERS

- 116 You state that county programs' concerns about Metro Mobility "have not been fully appreciated by the RTB." At the same time, the RTB has instructed the consultant to focus on county program coordination as an important part of this evaluation study.

Findings from the surveys conducted by the County Transit Associates in 1987 are referenced. If these statistics are being used by the consultant, have the sampling methodologies employed by the county programs been reviewed? Are the results statistically valid and reliable?

- 117 Please verify your finding that "loss or reduction in ridership of these programs would have a detrimental effect with local financial and volunteer support being eliminated."

The type of coordination that needs to be achieved between Metro Mobility and the county programs is not well defined.

The statement "Metro Mobility service in the Phase I expansion area in the western portion of Hennepin County has been ineffective as the providers are unwilling to serve the area due to time and distance problems" is not well supported with facts. What is the type and level of demand from this area? How many trips have been denied?

Please comment on the policy implication: should a trip never be denied?

- 118 On this page, you recommend that DARTS and HSI each should be appointed as the exclusive Metro Mobility providers in their respective counties. On the previous page, you stated that this needs to be closely studied before deciding "the right move." These are contradictory.

Page No.

Comment

If DARTS and HSI currently provide service only to a limited number of sites outside of their service areas, would these agencies provide service to any point in the metropolitan area, as participants in the Metro Mobility program?

How should the existing deficit-funded contracts with DARTS and HSI be adjusted to accommodate their participation in the Metro Mobility program?

You recommend that Anoka, Carver, and Scott counties act as "brokers," and that West Metro "be appointed as a coordinator" in western Hennepin county. Please explain the distinction between "broker" and "coordinator."

What would be the role and functions of the MMAC relative to these county programs?

119-125 The general descriptions of the county programs need more interpretation if presented in the body of the report. In what context are these descriptions important? How is this information relevant to the Metro Mobility program?

126-132 The raw scores and weights assigned in the "Organizational and Management Options Ranking" charts almost seem arbitrary without more explanation about their development and application.

Section 5

THAC, USERS, ADVOCATES, AND METRO MOBILITY'S PUBLIC IMAGE

133 Three areas identified for improvement by advocacy groups are "inadequate communications on how to use the system, insufficient safety oversight, and inadequate standards for driver training." Please summarize here any evaluation recommendations which address improvements in these areas.

134 You point out advocacy group concerns about "drivers (who) work 12-hour shifts, and the use of untrained back-up vehicle drivers." Please verify the extent to which this occurs.

Please note that in addition to the United Handicapped Federation, the State Council for the Handicapped played a key role in the evaluation of Metro Mobility system alternatives.

136 Please clarify the statement in the media analysis section that "the future of Metro Mobility is in question."

Do you have specific recommendations to offer for improving the RTB's relationship with advocacy groups?

Page No.

Comment

Section 6

FINANCIAL PARTICIPATION FROM HEALTH AND HUMAN SERVICE AGENCIES

- 140 The list of federal funding programs is presented without discussion of specific strategies that could be pursued by the RTB to capture funds from some of these sources for Metro Mobility.
- 142 The recommendation to consider merging the M.A. program with Metro Mobility needs to be explained further and must be justified. What impact would this have on the Metro Mobility program? Some of the factors that need to be addressed include provider productivity, new reimbursement rates, overall program subsidy requirements, and increased MMAC staffing levels.
- You have found that a "certain percentage of ambulatory riders who can, or be trained, to ride the fixed route system." Please clarify if this is considered "abuse" of the system. Is there a need to revise the eligibility criteria?
- Your proposal to implement a convenience fare "ticket" program for Metro Mobility riders to use the fixed route service needs more explanation. The analysis of associated RTB "savings" is difficult to follow.
- 143 Metro Mobility is a service for persons with disabilities who cannot use the fixed route service. You have addressed mobility training and conclude that riders who become trained to use fixed route service should be told that their "Metro Mobility certification would not be affected by them agreeing to ride the fixed route service." It would be helpful to go into more detail to explain this recommendation.
- For example, mobility training is generally targeted to developmentally disabled persons who travel to and from a specific location, such as a day activity center. Do you mean to say that mobility trained persons could use Metro Mobility only for trips not oriented to that specific location; otherwise the fixed route service must be used.

Section 7

COMPARATIVE ANALYSIS OF PARATRANSIT SYSTEMS

- 147 The "Comparative Program Review" generally provides a good description of four individual programs operating in other major metropolitan areas, however, there is no assessment of how well these programs are performing, particularly in relationship to the Metro Mobility program. There are no references made to the

COMPREHENSIVE REVIEW AND EVALUATION
OF THE METRO MOBILITY PROGRAM
Market Research Summary of Findings

Conducted by Carter Gobel Associates, Inc.
and N. K. Friedrichs & Associates, Inc.

October, 1987

SUMMARY OF FINDINGS

The Metro Mobility User

- Seventy one percent (71%) of certified persons contacted for this study have used the Metro Mobility system for their transportation needs during 1987.
- The predominant reasons for certified persons not availing themselves of Metro Mobility service are **deteriorating health and transportation availability from friends and relatives**, rather than poor service from the Metro Mobility administration or providers.
- The majority of Metro Mobility users:
 - ..Are female (77%)
 - ..Are age 65 or older (57%)
 - ..Are not married (77%)
 - ..Have an annual income of less than \$10,000 (64%)
(31% have an annual income of less than \$5,000)
 - ..Live in an apartment (47%) or private home (37%)
- Other key characteristics of users:
 - ..94% live in the initial area
 - ..74% have been certified for one year or longer
 - ..14% have a standing order
 - ..35% use a wheelchair or motorized vehicle
 - ..14% have some of their transportation paid by Medical Assistance

Patterns of Metro Mobility Use

- Metro Mobility users average 15.5 equivalent one-way trips per month.
- Metro Mobility currently provides 50% of the transportation requirements of its users. Nearly all non-Metro Mobility travel is by private car, which is provided by friends and relatives, since only 8% of Metro Mobility users drive and have a car available to them.
- Only 3% of Metro Mobility users expect to decrease their use of Metro Mobility services, against 41% who expect to use Metro Mobility more often in the future. This finding suggests that in light of the planned geographic expansion, demand on the system will increase geometrically.
- Clearly, a substantial number of current users rely heavily or exclusively on Metro Mobility for their transportation needs. To illustrate, 52% of consumers participating in this study stated that if Metro Mobility were not available, they would be unable to travel.
- Metro Mobility users are most likely to access the system on Tuesday, Wednesday, and Thursday; they are least likely to use the system on weekends.
- The predominant use of Metro Mobility is for health-related needs. Eighty-seven percent (87%) of current users access the system for this purpose. Other common purposes are to visit friends and relatives (44%); to go shopping (43%); or to conduct personal business such as banking, barber, or beauty shop (40%). From 23% to 34% use the system for meetings, recreational activities, or church/synagogue. As a whole, users are least likely to use the system to go to work (for pay or volunteer) or to obtain vocational training/go to school.
- There are multiple riders on 65% of Metro Mobility trips; the average number of riders in the vehicle is 2.1.

Carriers Used

- The majority (73%) of Metro Mobility users are aware that multiple carriers are available to them. Nevertheless, seven out of every ten users make use of one carrier only.
- Market shares are dispersed over a wide range of carriers. For the user population as a whole, Yellow Taxi of Minneapolis is clearly the predominant carrier, with a 28% share of market based on provider used most often. Each of the other carriers has a market share of less than 10%.
- The predominance of Yellow Taxi derives from its role of providing transportation to consumers who do not use wheelchairs. For this consumer segment (wheelchair nonusers), Yellow Taxi has a 42% share of market.
- Among wheelchair users, the structure of the market is quite different, with three carriers (Suburban Paratransit, Kare Kabs, and Med-Kab) owning over 60% of the market, with fairly equal shares of about 20% each.

Metro Mobility Imagery Ratings

- About 70% of consumers give Metro Mobility a rating of "10" (the top score) based on being a top quality service and for the Administration Center's helpfulness in answering questions.
- The Metro Mobility image is significantly more favorable among some consumer segments than others. To illustrate, wheelchair users rate Metro Mobility less favorably than ambulatory users based on both the quality of service and helpfulness in answering questions.
- The large majority (86%) of consumers give themselves a rating of "10" based on their understanding of how to use the Metro Mobility system.

Key Issues of Importance when Using a Transportation Service

- Fourteen of the twenty transportation service factors considered in this study emerge as very important to Metro Mobility users. Although differences among these fourteen key factors are subtle, those factors leading the list based on importance are the availability of service when it is requested, accessibility (to locations where users want to travel during the hours they wish to travel); cost; and safety issues (feeling safe on the ride, careful driving/not speeding, vehicles being in good condition, wheelchairs secured, and well-designed ramps and lifts).

Other key considerations are ease of placing an order, courteous and helpful drivers, drivers who know the city and don't get lost, courteous order takers, and being picked up on time.

- Those transportation factors that are noticeably less important to users are getting to their destination quickly; vehicles that are clean, have comfortable temperatures, good ventilation, and provide a smooth ride; drivers who are friendly and willing to talk; and drivers requiring seat belts.
- While this "importance profile" is an accurate description of the Metro Mobility user population as a whole, there are differences by consumer segment. Wheelchair users logically assign more importance to factors such as secured wheelchairs, seat belts, and safe, well-designed ramps/lifts. Overall, however, wheelchair users assign less importance to other issues such as courtesy of drivers and order takers, drivers knowing the city, and personal comfort (vehicles having comfortable temperatures/good ventilation, smooth ride, and clean vehicles), suggesting that their priorities differ.

Metro Mobility Strengths, Weaknesses, and Opportunities for Improvement

- The factor for which consumers give Metro Mobility the highest performance rating is **cost**. Other key strengths are service to locations where they want to travel, feeling safe on the ride, courteous order takers, secured wheelchairs, and ease of placing a trip order.
- At the other extreme, Metro Mobility gets the poorest scores for drivers always requiring seat belts, picking up users on time, vehicles providing a smooth ride, vehicles in good condition, and safe, well-designed ramps and lifts.
- The most noteworthy opportunities for improvement are those for which the importance rating is high and the performance rating is low.

From this perspective, there are ten key system enhancement opportunities:

| OPPORTUNITIES FOR IMPROVEMENT | Total Users | Wheelchair Users | Wheelchair Nonusers |
|---|-------------|------------------|---------------------|
| Providing service when it is requested | X | X | X |
| Picking up users on time | X | X | X |
| Providing vehicles that are in good condition | X | X | X |
| Providing vehicles with safe, well-designed lifts and ramps | X | X | |
| Extending available hours | X | X | |
| Improving ease of placing an order | | X | |
| Enforcing safe driving, eliminating speeding | | X | |
| Ensuring that drivers know the city so that they don't get lost | X | | X |
| Stressing driver courtesy and helpfulness | X | | X |
| Enforcing seat belt requirement | X | | X |

Complaints

- Only 28% of Metro Mobility users have ever made a complaint about the service.
- When they have voiced a complaint, the majority of consumers have called the Metro Mobility Administration Center (54%), although a substantial percentage (38%) have called the provider directly.
- Only 16% of users who have made a complaint in the past stated that they were dissatisfied with the outcome, suggesting that overall, both the Metro Mobility Administration Center and the providers are responsive to user complaints.

Pricing Issues

- 81% of Metro Mobility users believe that the \$10 annual certification fee is just about right. 69% concur with the \$10 fee for establishing a standing order. A lesser number (48%) feel that the \$5 fee to change a standing order is justified.
- Virtually all Metro Mobility users are currently paying \$1.00 for a trip up to eight miles (one way). The average perceived reasonable price for this trip using Metro Mobility is \$1.46. The average maximum amount consumers are willing to pay for this trip is \$1.91. These findings suggest that an optimal price point for an eight mile trip is somewhere between \$1.50 and \$2.00.

Pricing Issues

(CONTINUED)

- It should be noted, however, that nearly one-third of Metro Mobility users have annual incomes of less than \$5,000, suggesting that some consumers may need an abatement of these fees.
- Results of this study suggest that Metro Mobility users feel that attendants and guests should pay the same amount as certified riders. The attitude toward guest payments is particularly important, since 41% of Metro Mobility users sometimes take guests with them.

Communication Issues

- The majority (75%) of Metro Mobility users have received the Rider's Guide and 57% keep it handy for reference.
- With respect to newsletter communication, key topics of interest are information about changes in or additions to Metro Mobility service, information about how the service is funded, information about carriers, and a driver-of-the-month award.

COMPREHENSIVE REVIEW AND EVALUATION
OF THE METRO MOBILITY PROGRAM
-- MARKET RESEARCH PRESENTATION --

NOVEMBER 16, 1987

Given by
Carter Gobel Associates, Inc.
and
N. K. Friedrichs & Associates

COMPREHENSIVE REVIEW AND EVALUATION OF THE METRO MOBILITY PROGRAM

MARKET RESEARCH

Two phases of market research have been completed.

- Phase I (Qualitative Study):

Four focus group sessions were conducted with Metro Mobility users.

Dates were August 21-24, 1987.

- Phase II (Quantitative Study):

Telephone interviews were conducted with 707 respondents who are certified to use the Metro Mobility service during calendar year 1987.

503 full-length interviews were conducted with people who have used the system in 1987.

An additional 204 interviews were conducted with people who are certified, but have not used Metro Mobility during 1987.

Interviewing was conducted from September 14-30, 1987.

USE OF METRO MOBILITY SERVICE

- Seventy-one percent (71%) of certified persons contacted for this study have used the Metro Mobility system for their transportation needs during 1987, 29% have not.

REASONS FOR NOT USING METRO MOBILITY

| REASON | PERCENTAGE OF NONUSERS |
|---|------------------------|
| | (N=204) |
| <u>LACK OF NEED</u> | <u>35%</u> |
| HEALTH HAS DETERIORATED AND CAN'T TRAVEL | 17% |
| HAVEN'T GONE ANYWHERE/DON'T WORK ANY MORE/ SWITCHED TO A CLOSER HEALTH SERVICE | 8% |
| HEALTH HAS IMPROVED SO DON'T NEED IT | 7% |
| <u>ALTERNATE TRANSPORTATION</u> | <u>31%</u> |
| GET RIDES FROM FRIENDS/RELATIVES | 17% |
| WORKSHOP/GROUP-HOME/HOSPITAL PROVIDES TRANSPORTATION/USE ANOTHER SERVICE | 7% |
| HAVE MY OWN VEHICLE/ONLY USE IF I CAN'T DRIVE MYSELF | 5% |
| <u>POOR SERVICE FROM CARRIERS</u> | <u>14%</u> |
| <u>OTHER</u> | |
| JUST BECAME CERTIFIED/HAVEN'T USED IT YET | 14% |

EXHIBIT 3

USER CHARACTERISTICS

| CHARACTERISTIC | PERCENTAGE OF USERS |
|--|---------------------|
| | (N=503) |
| <u>SERVICE AREA</u> | |
| INITIAL AREA | 94% |
| EXPANSION AREA | 6 |
| <u>LENGTH OF CERTIFICATION</u> | |
| LESS THAN ONE YEAR | 26% |
| ONE YEAR OR LONGER | 74 |
| <u>STANDING ORDER</u> | |
| HAS STANDING ORDER (32% of total) | 14% (32% of total) |
| DOES NOT HAVE STANDING ORDER | 86 |
| <u>WHEELCHAIR/MOTORIZED VEHICLE USE^A</u> | |
| USES WHEELCHAIR | 35% |
| MANUALLY OPERATED | 26% |
| ELECTRIC | 12% |
| USES MOTORIZED VEHICLE | 3% |
| USES NEITHER | 65% |
| <u>LIFT REQUIREMENT</u> | |
| ALWAYS | 26% |
| SOMETIMES | 10 |
| NO | 64 |
| <u>ATTENDANT</u> | |
| CAN TRAVEL ALONE | 87% |
| CANNOT TRAVEL ALONE | 13 |
| <u>MEDICAL ASSISTANCE</u> | |
| SOMETIMES FOR TRANSPORTATION | 14% |
| DOES NOT PAY FOR TRANSPORTATION | 86 |
| <u>GUESTS</u> | |
| SOMETIMES TAKES NONCERTIFIED RELATIVE/GUEST | 41% |
| NEVER TAKES NONCERTIFIED RELATIVE/GUEST | 59 |
| <u>DRIVES A CAR AND HAS A CAR AVAILABLE</u> | |
| YES | 8% |
| NO | 92 |

A/ TOTAL EXCEEDS 100% BECAUSE OF USE OF MORE THAN ONE VEHICLE.

EXHIBIT 4

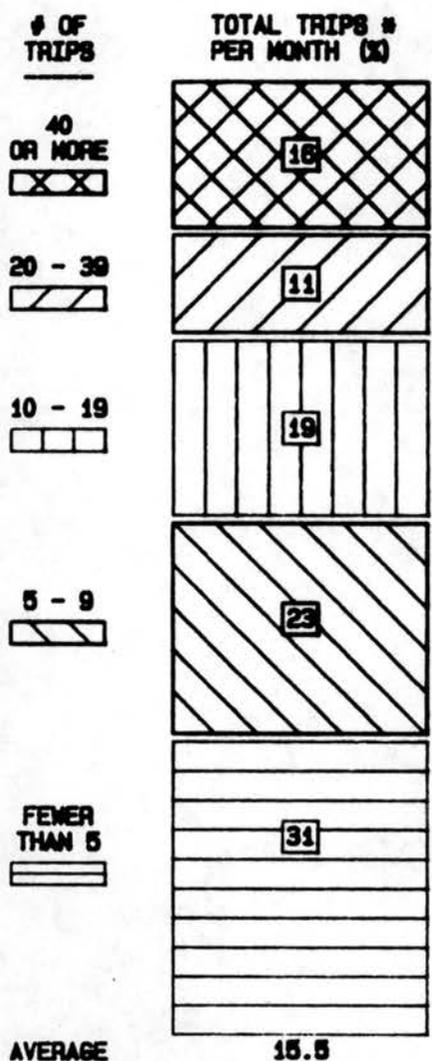
USER DEMOGRAPHIC CHARACTERISTICS

| DEMOGRAPHIC CHARACTERISTIC | PERCENTAGE OF USERS | | |
|------------------------------------|---------------------|-----------------------------|----------------------------|
| | (N=503) | | |
| <u>GENDER</u> | | | |
| MALE | 23% | | |
| FEMALE | 77 | | |
| <u>AGE</u> | | | |
| UNDER 25 YEARS | 4% | | |
| 25 - 34 YEARS | 9 | | |
| 35 - 44 YEARS | 9 | 43% | |
| 45 - 54 YEARS | 10 | | |
| 55 - 64 YEARS | 11 | | |
| 65 - 74 YEARS | 23 | | |
| 75 - 84 YEARS | 26 | 57% | |
| 85 YEARS AND OVER | 8 | | |
| <u>MARITAL STATUS</u> | | | |
| MARRIED | 23% | | |
| SINGLE | 32 | | |
| WIDOWED | 38 | 77% | |
| DIVORCED | 7 | | |
| <u>YEARLY FAMILY INCOME</u> | | <u>MARRIED USERS</u> | <u>SINGLE USERS</u> |
| | | (N=116) | (N=387) |
| LESS THAN \$2,500 | 12% | 4% | 14% |
| \$2,500 - \$4,999 | 19 | 5 | 23 |
| \$5,000 - \$9,999 | 33 | 22 | 37 |
| \$10,000 - \$14,999 | 19 | 30 | 15 |
| \$15,000 AND OVER | 17 | 39 | 11 |
| | | 9% | 37% |
| <u>TYPE OF RESIDENCE</u> | | | |
| APARTMENT | 47% | | |
| PRIVATE HOME | 37 | | |
| GROUP HOME | 8 | | |
| DUPLEX | 3 | | |
| CONDOMINIUM | 2 | | |
| TOWNHOUSE | 2 | | |
| MOBILE HOME | 1 | | |

II. PATTERNS OF METRO MOBILITY USE

Frequency of Use

The average user takes 15.5 Metro Mobility trips per month. Thirty-one percent (31%) of users might be classified as light users (i.e., fewer than 5 trips per month). At the other extreme, 16% of Metro Mobility consumers are extremely heavy users (i.e., 40 or more trips per month).



* CONVERTED TO ONE-WAY RIDES

Share of Rides Provided by Metro Mobility

Currently, Metro Mobility provides 50% of the transportation of its users. Virtually all of the non-Metro Mobility transportation is by private car. (Since only 8% of users drive and have a car available to them, the large majority of these private car trips are provided by friends and relatives.)

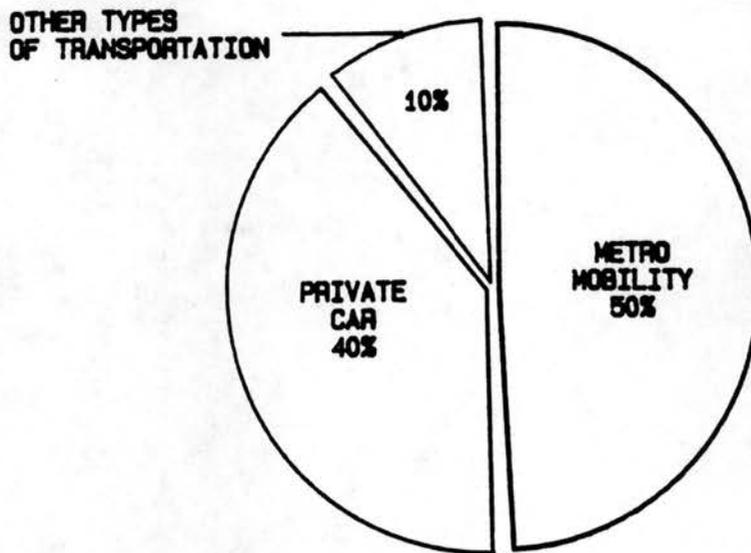
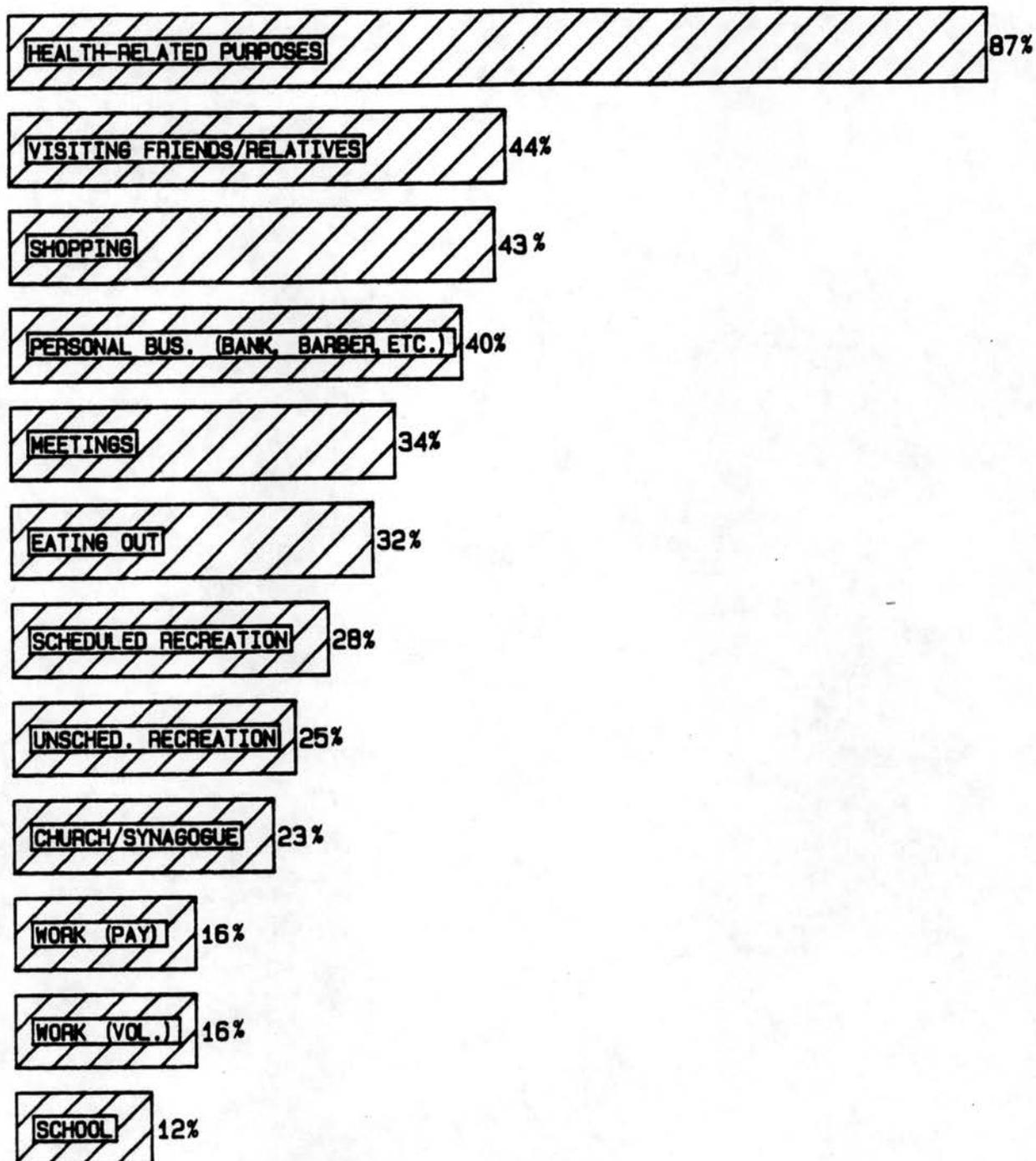


EXHIBIT 10 PURPOSES FOR WHICH METRO MOBILITY IS USED (N = 503)



Extent of Reliance on Metro Mobility

Clearly, a substantial number of users are heavily dependent on Metro Mobility to provide their transportation needs. Fifty-two percent (52%) of users stated that if Metro Mobility were not available to them, they would be unable to travel.

| SOURCE | PERCENTAGE OF USERS ^A |
|---|----------------------------------|
| | (N=503) |
| COULD NOT HAVE TRAVELED | 52% |
| RIDE IN CAR WITH FRIEND OR RELATIVE DRIVING | 25% |
| CAB FULL FARE PUBLIC TRANSPORTATION | 23% |
| BUS FIXED ROUTE PUBLIC TRANSPORTATION | 8% |
| DRIVE A CAR | 3% |
| SOCIAL SERVICE TRANSPORTATION (RED CROSS, ETC.) | 2% |
| GROUP HOME OWNED VEHICLE | 1% |

^{A/} TOTAL EXCEEDS 100% BECAUSE OF MULTIPLE RESPONSES.

VERBATIM COMMENTS FROM FOCUS GROUPS:

"Well it is the difference between going and not."

"I do appreciate being on Mobility because otherwise how would I get around? I am thankful for it."

"I think it is wonderful because without it I'd have to stay home."

"I can work because of it."

"One big plus that I find is it enables me now to share holidays with relatives. Before I had no transportation."

Anticipated Future Use of Metro Mobility

Fifty-six percent (56%) of consumers expect to use Metro Mobility **about as often** in the future as they do now; another 41% expect to use the system **more often**; leaving only 3% who expect to use it **less often**. These findings suggest that irrespective of system expansion, demands on the system will increase over time.

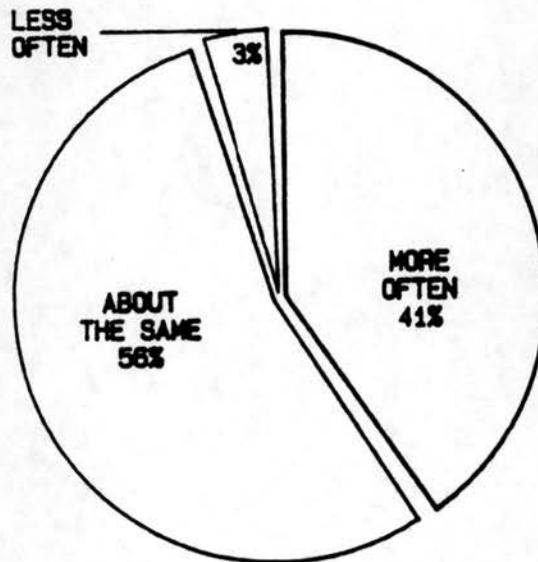


EXHIBIT 12

PROVIDERS USED

| CARRIER | PROVIDERS USED SINCE JANUARY 1987 | PROVIDER USED MOST OFTEN |
|---|-----------------------------------|--------------------------|
| | (N=503) | (N=503) |
| YELLOW TAXI (MINNEAPOLIS) | 32% | 28% |
| SUBURBAN PARATRANSIT | 11% | 9% |
| CITY WIDE CAB | 9% | 9% |
| MED-KAB (MIDWEST OLSON MED-KAB) | 11% | 7% |
| KARE KABS | 11% | 6% |
| MORELY BUS COMPANY | 8% | 6% |
| CAREBUS OR CAREVAN | 6% | 4% |
| DIAMOND CAB | 5% | 4% |
| EBENEZER SOCIETY | 6% | 4% |
| METRO RIDE OF MINNESOTA | 6% | 4% |
| ACTIVE-READY RIDE/HEALTH CENTRAL/ HEALTH ONE | 6% | 3% |
| BLUE AND WHITE TAXI | 6% | 3% |
| DARTS (DAKOTA COUNTY REFERRAL SERVICE) | 3% | 3% |
| HANDICABS | 4% | 3% |
| COMMUTER EXPRESS (ST. PAUL SUBURBAN BUS COMPANY) | 3% | 2% |
| HANDICAPPED TRANSPORT SYSTEM (HTS) | 6% | 2% |
| TOWN TAXI/YELLOW TAXI (ST. PAUL) | 3% | 2% |
| WILDER | 3% | 2% |
| NORTH MEMORIAL (NORTH MEDICAL) | 2% | 1% |
| TWIN CITY MOBILITY | 1% | 1% |

NOTE: TOTALS EXCEED 100% BECAUSE OF MULTIPLE RESPONSES.

EXHIBIT 13

PROVIDER USED MOST OFTEN
-- WHEELCHAIR USERS VS. NONUSERS --

| PROVIDER | WHEELCHAIR USERS | PROVIDER | WHEELCHAIR NONUSERS |
|--|---------------------|--|------------------------|
| | (N=177) | | (N=326) |
| SUBURBAN PARATRANSIT | 22% | YELLOW TAXI (MINNEAPOLIS) | 42% |
| KARE KABS | 21% | CITY WIDE CAB | 14% |
| MED-KAB (MIDWEST OLSON) | 20% | BLUE AND WHITE TAXI | 8% |
| CAREBUS OR CAREVAN | 14% | DIAMOND CAB | 8% |
| YELLOW TAXI (MINNEAPOLIS) | 14% | MORELY BUS COMPANY | 8% |
| ACTIVE-READY RIDE/HEALTH CENTRAL/HEALTH ONE | 12% | KARE KABS | 6% |
| HANDICAPPED TRANSPORT SYSTEM (HTS) | 11% | MED-KAB (MIDWEST OLSON) | 6% |
| EBENEZER SOCIETY | 10% | SUBURBAN PARATRANSIT | 5% |
| METRO RIDE OF MINNESOTA | 10% | TOWN TAXI/YELLOW TAXI (ST. PAUL) | 5% |
| MORELY BUS COMPANY | 8% | ACTIVE-READY RIDE/HEALTH CENTRAL/HEALTH ONE | 3% |
| HANDICABS | 7% | DARTS (DAKOTA COUNTY REFERRAL SERVICE) | 3% |
| COMMUTER EXPRESS/ST. PAUL SUBURBAN BUS | 5% | EBENEZER SOCIETY | 3% |
| NORTH MEMORIAL/NORTH MEDICAL | 4% | HANDICABS | 3% |
| WILDER | 4% | HANDICAPPED TRANSPORT SYSTEM (HTS) | 3% |
| BLUE AND WHITE TAXI | 2% | METRO RIDE OF MINNESOTA | 3% |
| CITY WIDE CAB | 2% | WILDER | 3% |
| DARTS (DAKOTA COUNTY REFERRAL SERVICE) | 2% | CAREBUS OR CAREVAN | 2% |
| TWIN CITY MOBILITY | 2% | COMMUTER EXPRESS/ST. PAUL SUBURBAN BUS | 2% |
| DIAMOND CAB | 1% | TWIN CITY MOBILITY | 1% |
| TOWN TAXI/YELLOW TAXI (ST. PAUL) | 1% | NORTH MEMORIAL/NORTH MEDICAL | * |

* LESS THAN .5 PERCENT.

EXHIBIT 16

METRO MOBILITY PERFORMANCE

(PERCENTAGE OF RESPONDENTS GIVING PRIMARY METRO MOBILITY PROVIDER A "10" RATING)

| FACTOR | TOTAL USERS | WHEELCHAIR USERS | WHEELCHAIR NONUSERS |
|---|-------------|------------------|---------------------|
| | (N=503) | (N=177) | (N=326) |
| THE COST OF THE RIDE IS REASONABLY PRICED | 84% | 79% | 87% |
| PROVIDES SERVICE TO THE LOCATION WHERE YOU WANT TO GO | 82% | 75% | 85% |
| YOU FEEL SAFE WHEN YOU RIDE WITH THEM | 79% | 75% | 81% |
| COURTEOUS ORDER TAKERS | 78% | 70% | 83% |
| WHEELCHAIRS ARE SECURELY TIED DOWN/ LOCKED INTO POSITION | 76% | 79% | 71% |
| IT IS EASY TO CALL IN AND PLACE A TRIP ORDER | 75% | 65% | 81% |
| DRIVERS DRIVE CAREFULLY AND DO NOT EXCEED THE SPEED LIMIT | 74% | 65% | 79% |
| GETS YOU TO YOUR DESTINATION QUICKLY | 70% | 61% | 75% |
| HAS DRIVERS WHO ARE FRIENDLY AND WILL TALK TO YOU | 70% | 69% | 70% |
| PROVIDES SERVICE DURING THE HOURS WHEN YOU WANT TO TRAVEL | 69% | 57% | 76% |
| COURTEOUS, HELPFUL DRIVERS | 68% | 64% | 70% |
| ABLE TO PROVIDE SERVICE WHEN YOU REQUEST IT | 65% | 53% | 71% |
| DRIVERS KNOW THE CITY WELL AND DO NOT GET LOST | 62% | 53% | 67% |
| CLEAN VEHICLES | 62% | 59% | 64% |
| VEHICLES HAVE COMFORTABLE TEMPERATURES AND GOOD VENTILATION | 60% | 54% | 63% |
| RAMPS/LIFT EQUIPMENT IS WELL DESIGNED AND SAFE TO USE | 57% | 51% | 64% |
| VEHICLES ARE IN GOOD CONDITION | 56% | 52% | 58% |
| VEHICLES PROVIDE A SMOOTH RIDE | 56% | 45% | 63% |
| PROVIDER PICKS YOU UP ON TIME | 54% | 50% | 56% |
| DRIVER ALWAYS REQUIRES THAT YOU USE YOUR SEAT BELT | 53% | 73% | 41% |

← DENOTES SIGNIFICANT DIFFERENCE.

EXHIBIT 14

METRO MOBILITY IMAGERY STATEMENTS

(PERCENTAGE OF CONSUMERS GIVING "10" RATINGS)

| STATEMENT | ALL USERS | WHEELCHAIR USERS | WHEELCHAIR (NON)USERS |
|--|--------------------|---------------------|--------------------------|
| METRO MOBILITY IS A MEANS OF TRANSPORTATION THAT YOU KNOW HOW TO USE | (N=503) 86% | (N=177) 82% | (N=326) 89% |
| METRO MOBILITY PROVIDES A TOP QUALITY SERVICE FOR HANDICAPPED INDIVIDUALS | 72% | 56% ← | 81% |
| THE METRO MOBILITY ADMINISTRATION CENTER IS HELPFUL AT ANSWERING YOUR QUESTIONS | 71% | 58% ← | 78% |

← DENOTES SIGNIFICANT DIFFERENCE.

EXHIBIT 15

IMPORTANCE OF SELECTED FACTORS TO METRO MOBILITY USERS

(PERCENTAGE OF RESPONDENTS GIVING IMPORTANCE A "10" RATING)

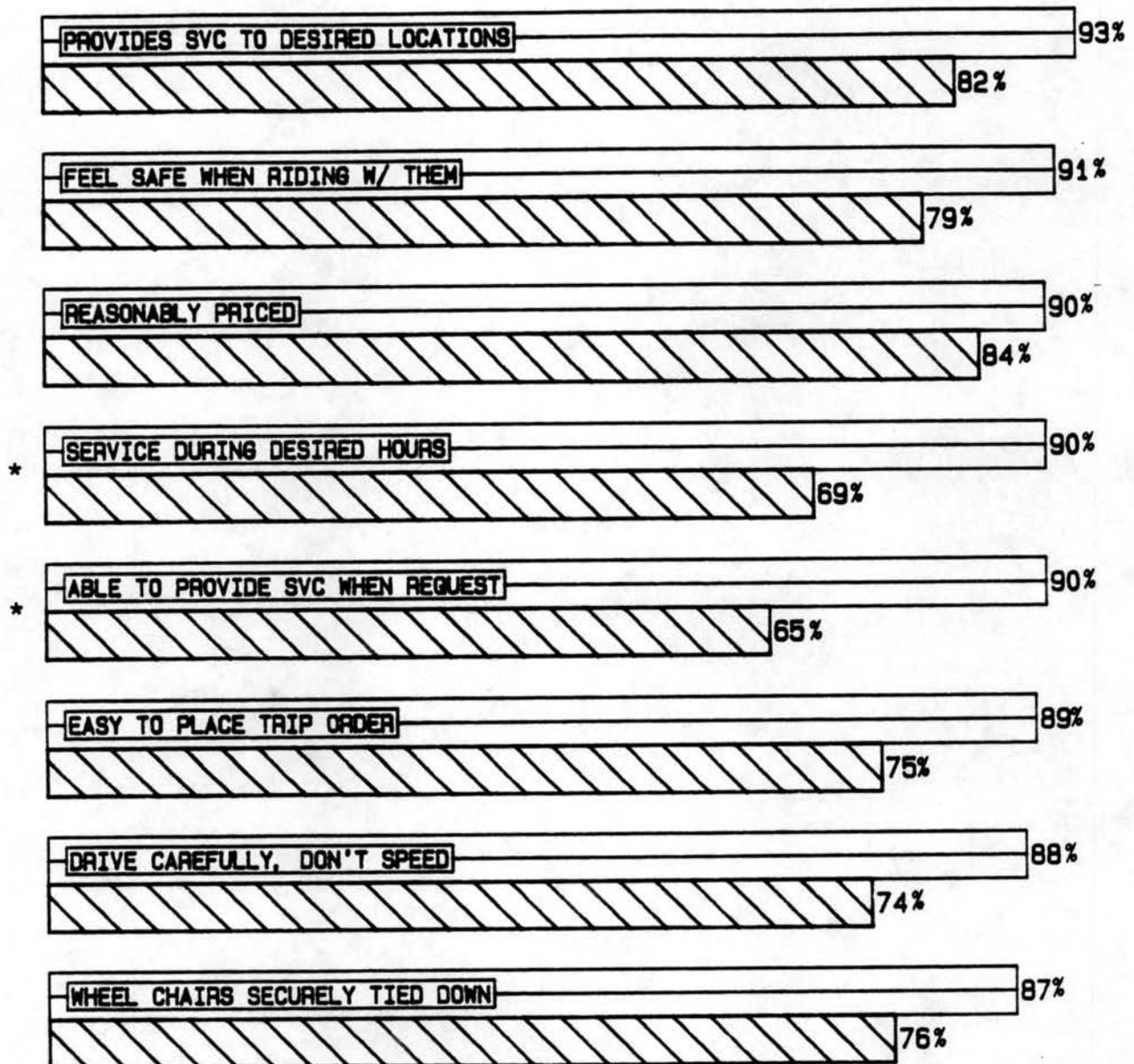
| FACTOR | ALL USERS | USES WHEELCHAIR | DOES NOT USE WHEELCHAIR |
|---|-----------|-----------------|-------------------------|
| N= | (503) | (177) | (326) |
| PROVIDES SERVICE TO LOCATIONS WHERE YOU WANT TO GO | 93% | 92% | 95% |
| YOU FEEL SAFE WHEN YOU RIDE WITH THEM | 91% | 87% | 93% |
| THE COST OF THE RIDE IS REASONABLY PRICED | 90% | 86% | 92% |
| PROVIDES SERVICE DURING THE HOURS WHEN YOU WANT TO TRAVEL | 90% | 89% | 91% |
| ABLE TO PROVIDE SERVICE WHEN YOU REQUEST IT | 90% | 86% | 91% |
| IT IS EASY TO CALL IN AND PLACE A TRIP ORDER | 89% | 86% | 91% |
| DRIVERS DRIVE CAREFULLY AND DO NOT EXCEED THE SPEED LIMIT | 88% | 85% | 90% |
| WHEELCHAIRS ARE SECURELY TIED DOWN/LOCKED INTO POSITION | 87% | 91% | 83% |
| COURTEOUS, HELPFUL DRIVERS | 85% | 75% | 91% |
| VEHICLES IN GOOD CONDITION | 85% | 81% | 87% |
| PICKS YOU UP ON TIME | 85% | 83% | 86% |
| RAMPS/LIFTS ARE WELL DESIGNED, SAFE TO USE | 84% | 90% | 79% |
| COURTEOUS ORDER TAKERS | 83% | 72% | 88% |
| DRIVERS KNOW CITY WELL, DO NOT GET LOST | 81% | 72% | 85% |
| GETS YOU TO YOUR DESTINATION QUICKLY | 76% | 71% | 79% |
| CLEAN VEHICLES | 70% | 63% | 75% |
| VEHICLES HAVE COMFORTABLE TEMPERATURES, GOOD VENTILATION | 70% | 62% | 76% |
| DRIVER ALWAYS REQUIRES THAT YOU USE SEAT BELT | 68% | 76% | 64% |
| HAS DRIVERS WHO ARE FRIENDLY AND WILL TALK TO YOU | 66% | 65% | 66% |
| VEHICLES PROVIDE SMOOTH RIDE | 66% | 57% | 71% |

← DENOTES SIGNIFICANT DIFFERENCE.

EXHIBIT 17
IMPORTANCE VS. PERFORMANCE
BASED ON PERCENTAGES OF RESPONDENTS GIVING IMPORTANCE
OR PERFORMANCE "10" RATINGS
(N = 503)

IMPORTANCE PERFORMANCE
▬▬▬ ▨▨▨

VERY IMPORTANT FACTORS



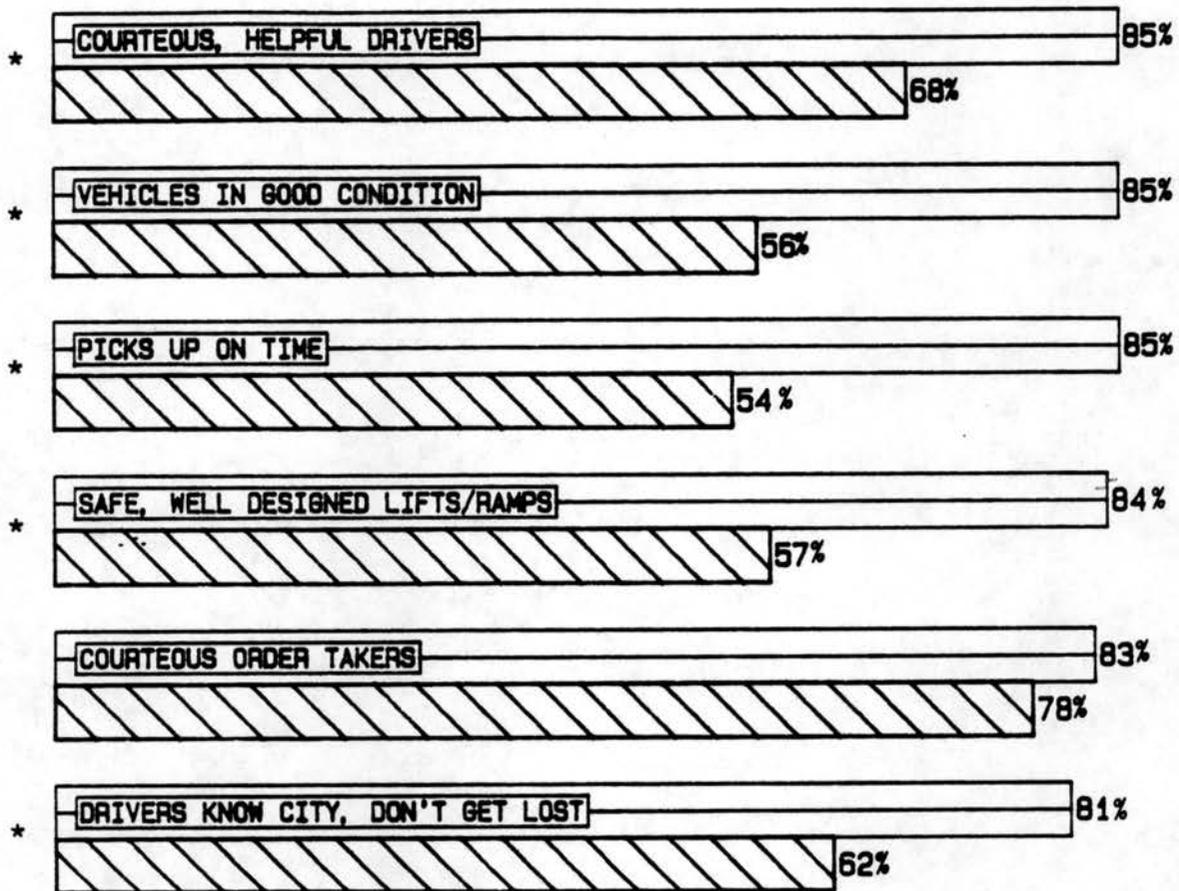
(CONTINUED)

* Opportunity for improvement

EXHIBIT 17 (CONTINUED)
IMPORTANCE VS. PERFORMANCE
BASED ON PERCENTAGES OF RESPONDENTS GIVING IMPORTANCE
OR PERFORMANCE "10" RATINGS
(N = 503)

IMPORTANCE PERFORMANCE
▬▬▬ ▨▨▨

VERY IMPORTANT FACTORS (CONTINUED)



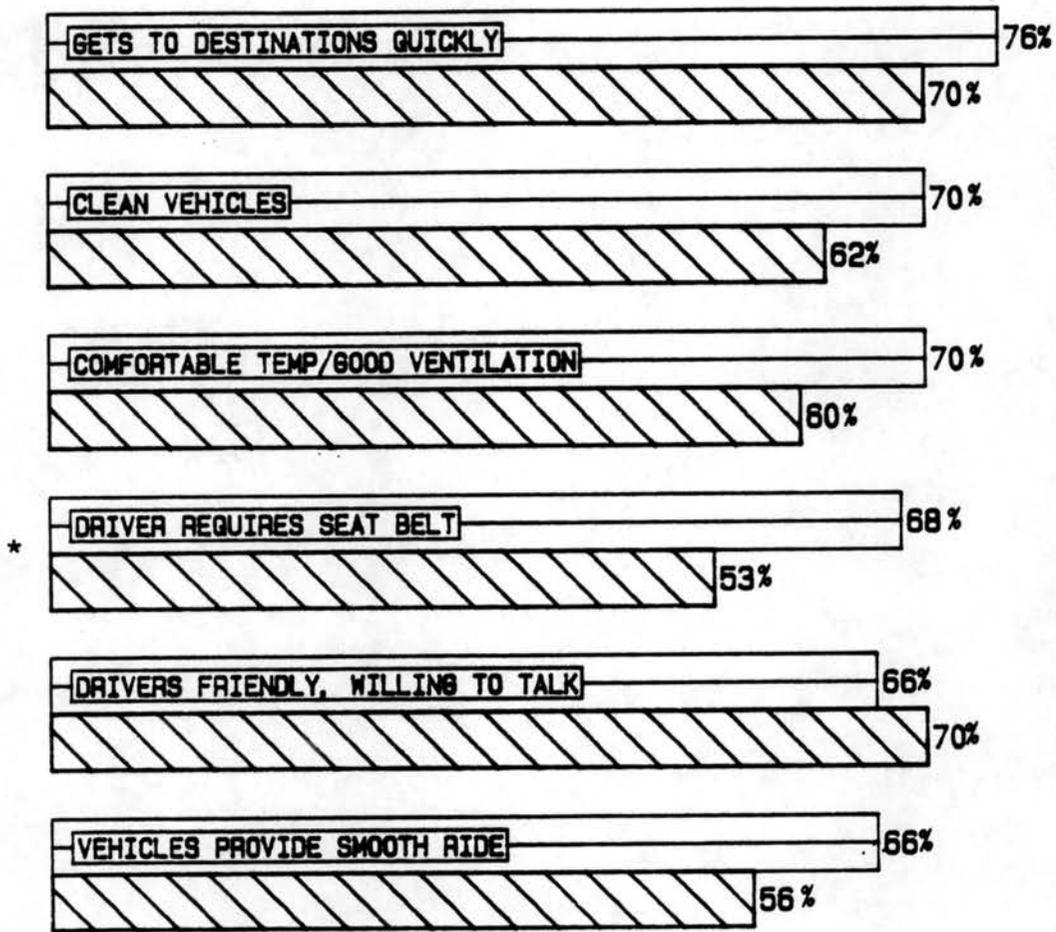
* Opportunity for improvement

(CONTINUED)

EXHIBIT 17 (CONTINUED)
IMPORTANCE VS. PERFORMANCE
BASED ON PERCENTAGES OF RESPONDENTS GIVING IMPORTANCE
OR PERFORMANCE "10" RATINGS
(N = 503)

IMPORTANCE PERFORMANCE
▬▬▬ ▨▨▨

LESS IMPORTANT FACTORS



* Opportunity for improvement

| OPPORTUNITIES FOR IMPROVEMENT | TOTAL USERS | WHEELCHAIR USERS | WHEELCHAIR NONUSERS |
|---|-------------|------------------|---------------------|
| Providing service when it is requested | X | X | X |
| Picking up users on time | X | X | X |
| Providing vehicles that are in good condition | X | X | X |
| Providing vehicles with safe, well-designed lifts and ramps | X | X | |
| Extending available hours | X | X | |
| Improving ease of placing a order | | X | |
| Enforcing safe driving, eliminating speeding | | X | |
| Ensuring that drivers know the city so that they don't get lost | X | | X |
| Stressing driver courtesy and helpfulness | X | | X |
| Enforcing seat belt requirement | X | | X |

EXHIBIT 21 INCIDENCE OF MAKING A COMPLAINT ABOUT METRO MOBILITY SERVICE

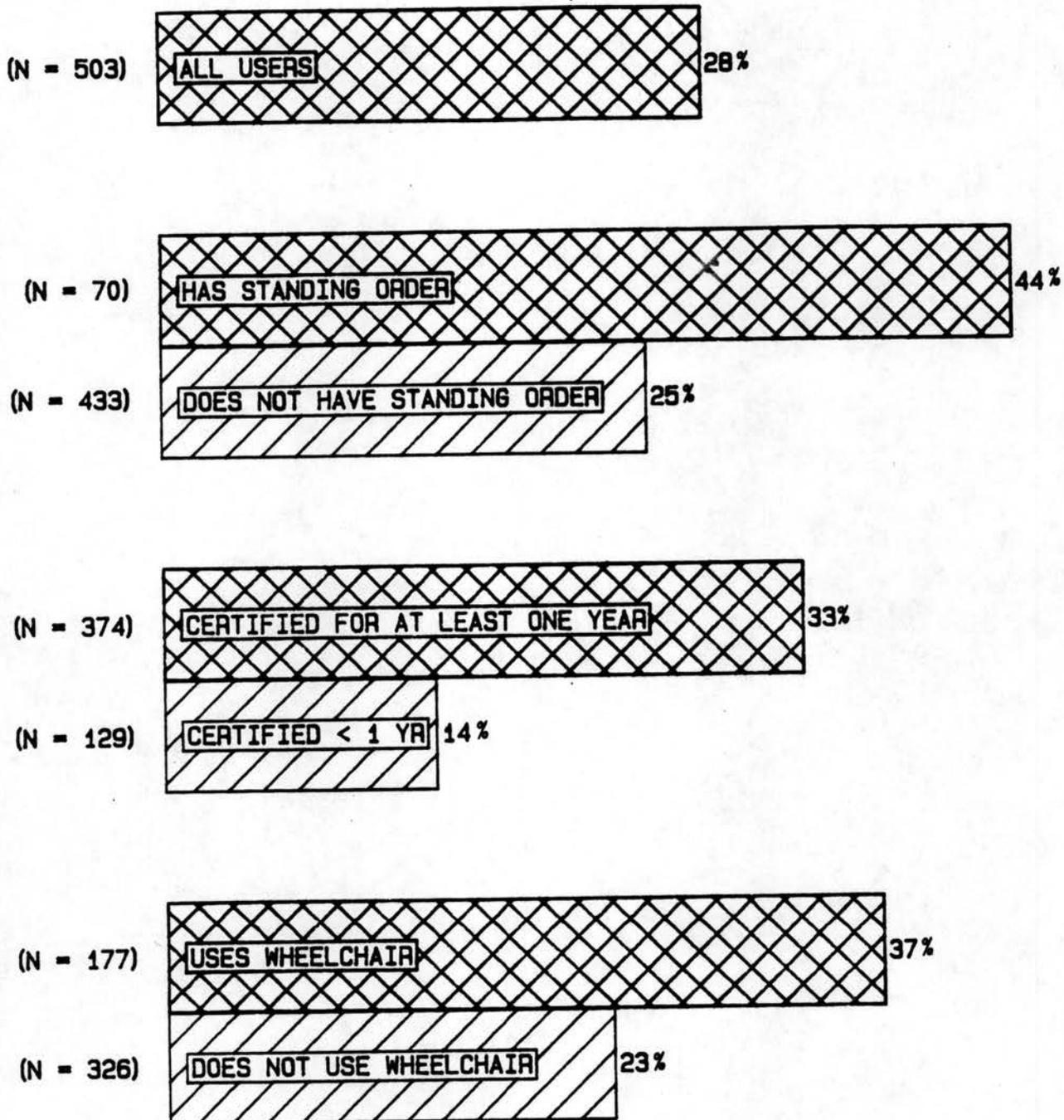
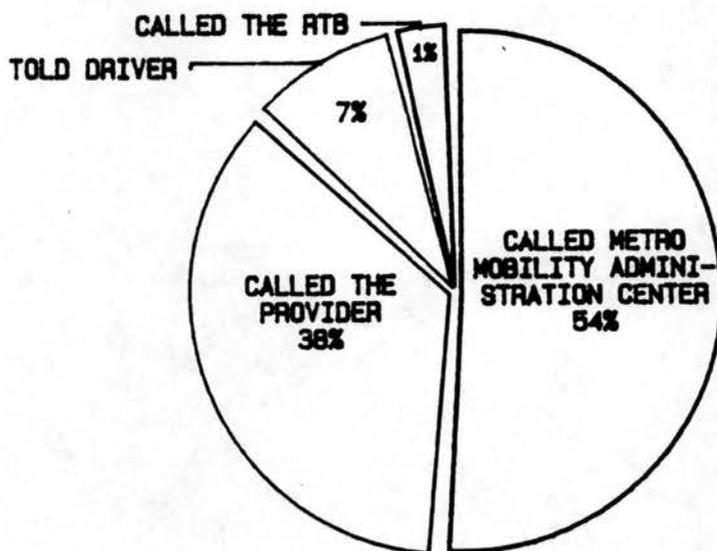


EXHIBIT 22

TO WHOM COMPLAINT WAS MADE

(N = 140)



SATISFACTION WITH WAY IN WHICH COMPLAINT WAS HANDLED

(N = 140)

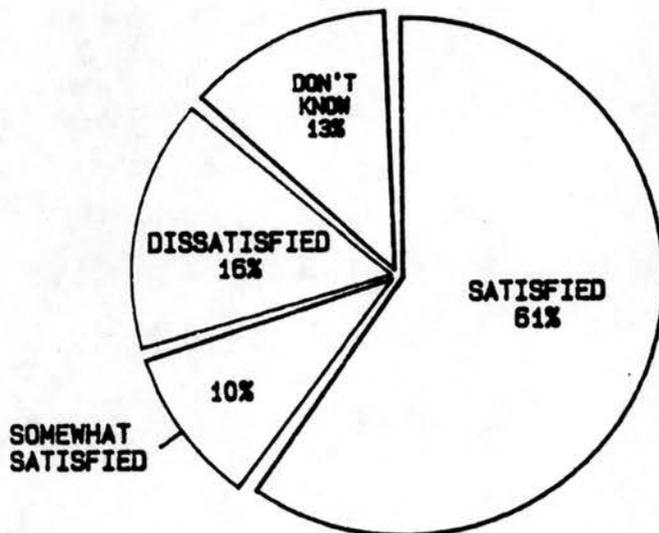
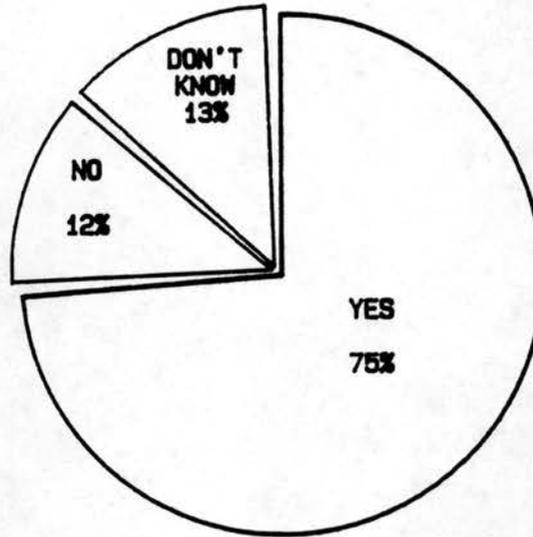


EXHIBIT 28
THE RIDER'S GUIDE
(N = 503)

INCIDENCE OF RECEIVING RIDER'S GUIDE
WITHIN THE LAST YEAR



INCIDENCE OF KEEPING RIDER'S GUIDE
HANDY FOR REFERENCE

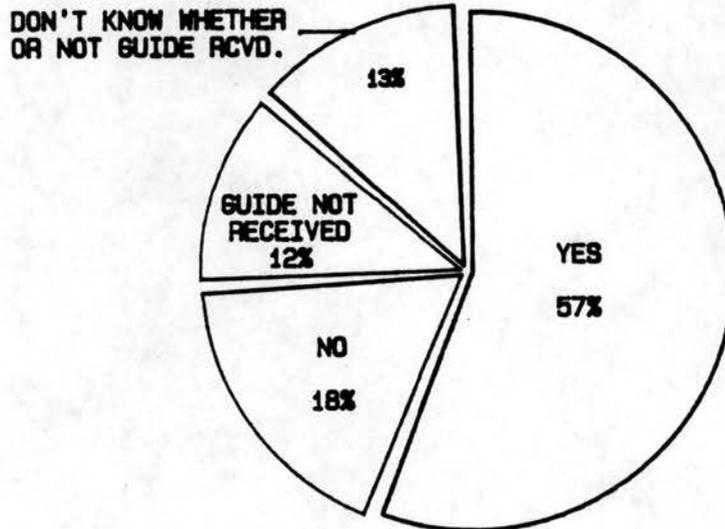


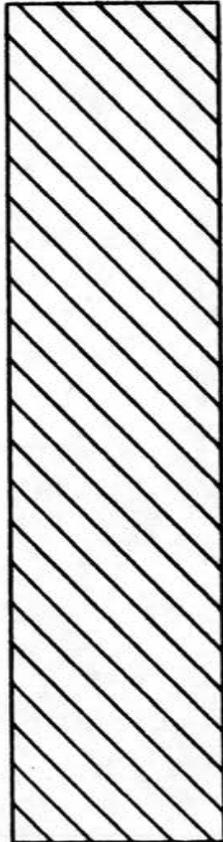
EXHIBIT 29

**USER INTEREST IN SELECTED TOPICS FOR INCLUSION
IN METRO MOBILITY NEWSLETTERS**

(N = 503)

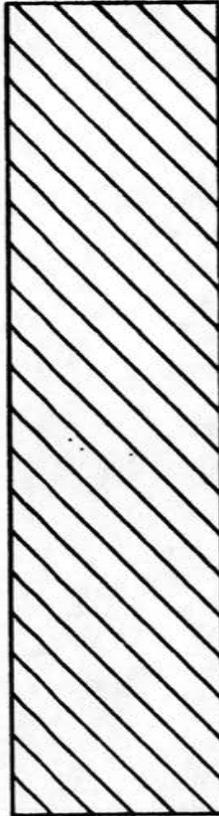
**INFORMATION ON
CHANGES/ADDITION
IN MM SERVICE**

92%



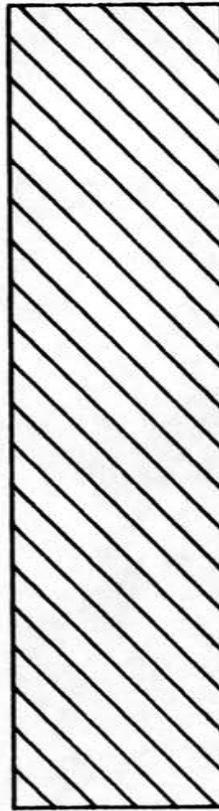
**DRIVER OF
THE MONTH
AWARD**

89%



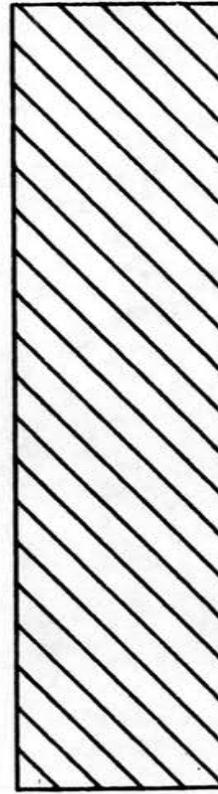
**INFORMATION
ON HOW MM
IS FUNDED**

88%



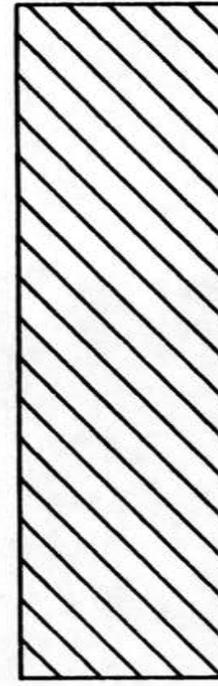
**INFORMATION
ABOUT
CARRIERS**

86%



**INFORMATION
ABOUT MM
ADVISORY
COMMITTEES**

74%



**HUMAN
INTEREST
STORIES
ABOUT RIDERS**

66%

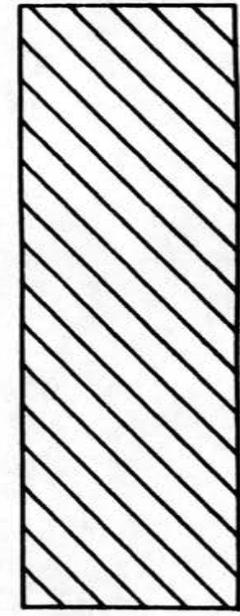


EXHIBIT 23
USER ATTITUDES TOWARD THE ANNUAL
CERTIFICATION FEE OF \$10

(N = 503)

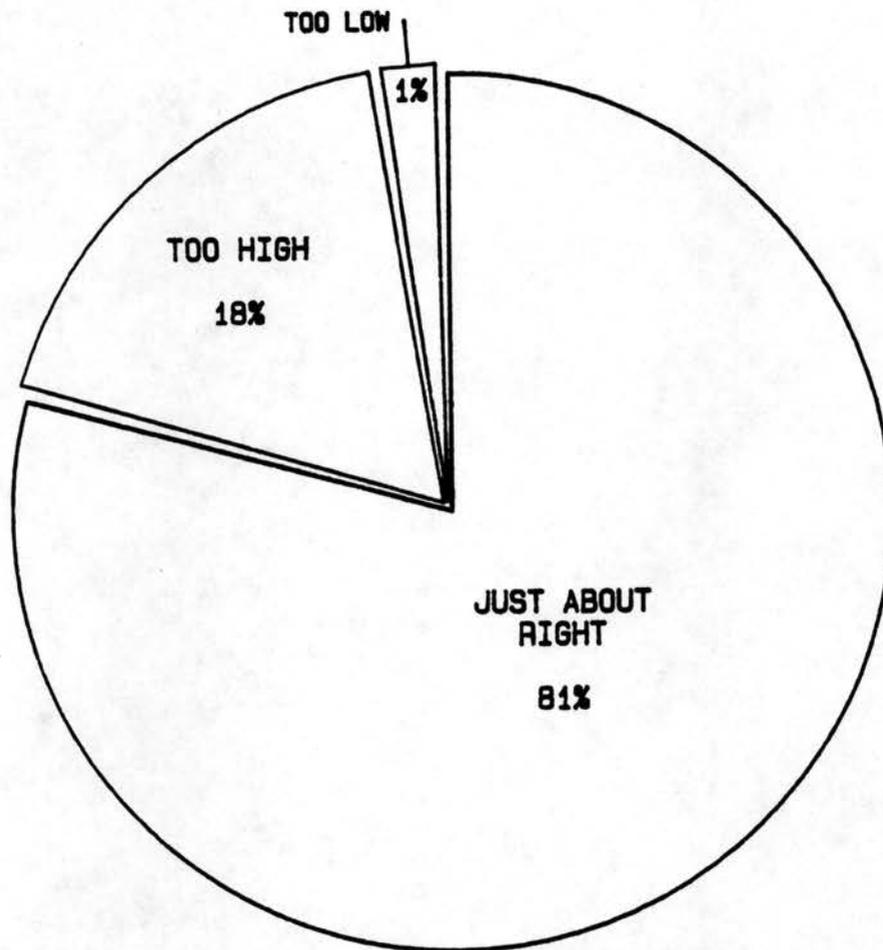
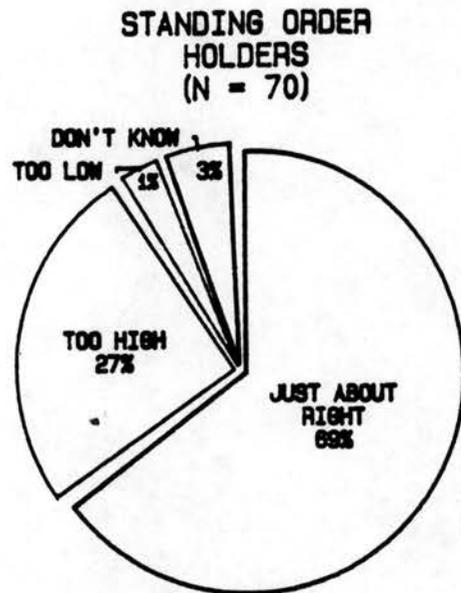
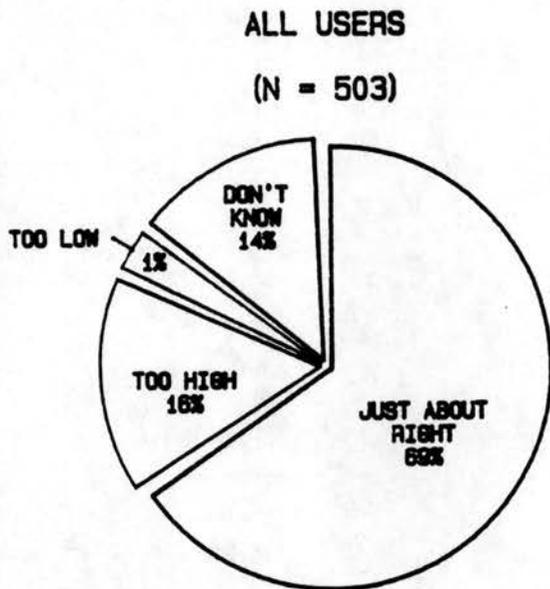


EXHIBIT 24

ATTITUDE TOWARD \$10 CHARGE TO SET UP A STANDING ORDER



ATTITUDE TOWARD \$5 CHARGE TO CHANGE A STANDING ORDER

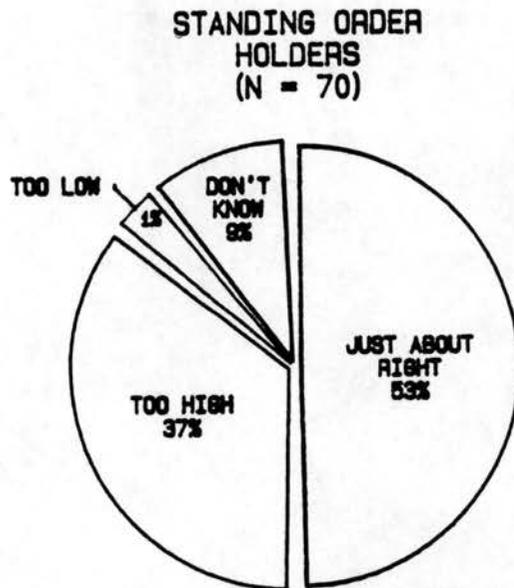
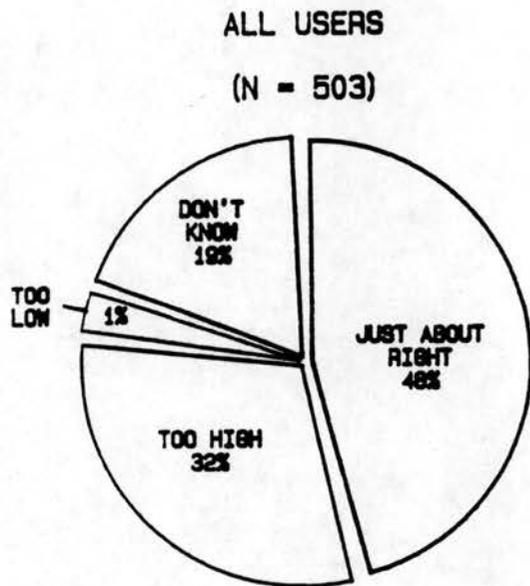
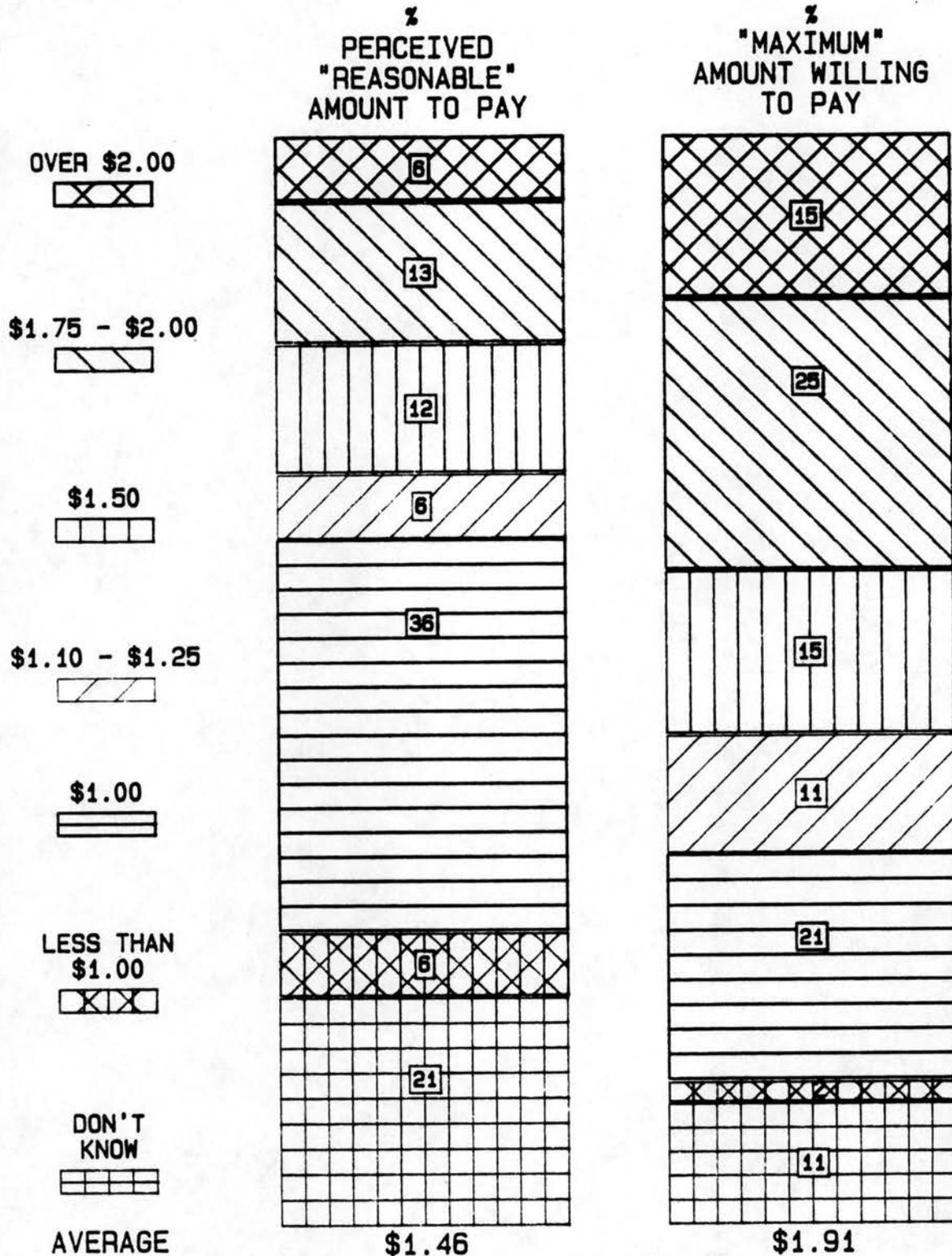


EXHIBIT 26 ATTITUDES TOWARD PRICING FOR A ONE-WAY TRIP UP TO 8 MILES

(N = 503)



| | <u>N =</u> | <u>% PERCEIVED "REASONABLE" AMOUNT TO PAY</u> | <u>% MAXIMUM AMOUNT WILLING TO PAY</u> |
|------------------------------|------------|---|--|
| <u>All users</u> | (505) | \$1.46 | \$1.91 |
| <u>Income</u> | | | |
| Under \$5,000 | (127) | \$1.33 | \$1.85 |
| \$5,000 to \$9,999 | (138) | 1.41 | 1.86 |
| \$10,000 to \$14,999 | (77) | 1.66 | 1.96 |
| \$15,000 or more | (72) | 1.62 | 2.02 |
| <u># of Rides/Month:</u> | | | |
| 0 - 5 | (158) | \$1.56 | \$2.08 |
| 6 - 15 | (174) | 1.45 | 1.87 |
| 16+ | (171) | 1.37 | 1.80 |

REGIONAL TRANSIT BOARD

Suite 270 Metro Square Building, Saint Paul, Minnesota 55101
292-8818

REPORT OF THE NOMINATING COMMITTEE

TO: Regional Transit Board

DATE: December 28, 1987

On December 21 the chairman appointed a committee to nominate officers of the board for 1988. The committee conferred and recommends the following:

That the Regional Transit Board approve the appointment of the following officers, effective immediately:

Rochelle Graves, Vice Chair
Paul Joyce, Treasurer
Mary Fitzgerald, Secretary

RTBTX1