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Implementation Guide

Implementation Guide Overview

1 Introduction.

The Pennsylvania Department of Transportation (PENNDOT) developed this document to assist shared ride providers in applying for, planning for, and implementing the discount fare transportation program for persons with disabilities. The Implementation Guide provides practical information based on the experience of a Pilot Project in 8 counties from January 2001 to June 2002.

1.1 Organization

The Implementation Guide is organized into 10 major sections that correspond with an implementation flowchart and timeline. Each section is organized to include:

- An overview
- Steps to be completed pertaining to the subject section (with reference materials and examples)
- Various tools/checklists.

The guide provides material to support the development of a grant application for expansion systems and various tools to help the potential expansion systems to evaluate their own systems. The guide is a resource that should help potential expansion system providers to collect the required baseline data, to prepare to expand their ridership base and to further improve their systems.

1.2 Program Contacts

We hope that the Implementation Guide will be a useful resource for program start up and routine reference. You may also need assistance from PENNDOT from time to time especially during program formation. The following contacts should be made as necessary:
1.3 Program Background

This three-part section presents a background summary of the development of the PwD Program as follows:

- Disability Transportation Issues Chronology
- Pilot Project Overview
- PwD State Program Overview.

1.3.1 Disability Transportation Issues Chronology

The following points provide a chronology of activity and analysis prior to the January 2001 Pilot start-up:

- Beginning with the September 1995 “Freedom Ride ’95” persons with disabilities have actively worked to make state and local officials aware of the need for accessible affordable, public transportation, particularly in rural areas. The purpose of their efforts was to enable more independent living and greater mobility to work, shop, attend school or training, and access medical facilities.

- In support of Governor Ridge’s Disability Agenda, PENNDOT formed the Rural Transportation Work Group in May 1997. This group includes state agencies affected by this issue including the Departments of Public Welfare, Labor and Industry, Community and Economic Development, Health and Aging, the Rural Development Council, and the Governor’s Office. The Governor’s Disability Agenda charged the Work Group with identifying transportation problems faced by persons with disabilities; inventorying existing transportation systems in rural areas; and developing recommendations to address the lack of transportation. Following months of research, videoconferences and meetings, the Work Group concluded that it did not have the necessary quantifiable data to recommend a sound policy decision on this subject.

- Within this same time frame (since 1998) several legislative proposals (Senate Bills 1236 and 1099 and House Bills 2285, 1958 and 2090), for a “shared-ride program” for persons with disabilities, were introduced. PENNDOT lacked the quantifiable data to sufficiently analyze or take a position on these bills.
• In September 1999 PENNDOT asked the independent Transportation Advisory Committee (TAC) to conduct a needs study to gather the quantifiable data so that the Work Group could make recommendations to the Governor. In October 1999, the TAC established a study task force and directed Gannett Fleming Inc. to carry out the study (through its TAC support contract), with a scheduled completion in mid-2000.

• The results of the TAC study Assessing the Availability of Transportation Services for Persons with Disabilities in Rural Pennsylvania are summarized below:

1. The need for discounted transportation services was demonstrated through a survey of persons with disabilities in the eight Pilot Counties\(^1\). The survey identified the need for transportation to access employment, shopping and medical services; however the TAC study scope did not include the development of reasonable ridership or cost estimates.

2. Some transportation services and funding to purchase transportation for clients exists through a wide range of programs. Any expansion of transportation funding sources must be designed and delivered in a manner that requires the “maintenance of effort” for these existing services and funding streams, especially as the ultimate extent of service demand was not yet known. TAC concluded that, a transportation program designed to discount transportation service for persons with disabilities should only pay for trips that cannot be funded through an existing program. Bottomline – This program should be a funding source of last resort.

• The key limitation of the TAC study and all other analysis preceding the Pilot is that there had been no empirical basis to quantify ridership demand and identify capital/operating costs. The TAC survey provided a statistically valid indication of need, but no hard data on actual demand to validate the survey results. The TAC Study concluded that only through a Pilot or program implementation could data collection be completed. In short, the idea behind the Pilot was that the study findings could only be validated through real experience. The Pilot would represent data collection related to actual usage.

• PENNDOT responded to the STC’s adoption of the TAC report by authorizing the Pilot Project for a January 2001 start up. It is important to note that there was a major effort to support the Pilot counties in a variety of ways so that the data collected would

\(^1\) Cumberland, York, Elk, Jefferson, Clearfield, Washington, Greene, and Schuylkill Counties.
be valid in the development of statewide program ridership and cost estimates. Funds were provided for not only fare subsidization, but also to assist with equipment acquisition, administration, training and marketing. The following section describes the Pilot Project results and their implications with regard to program implementation in additional counties.

1.4 Pilot Project Overview

The Pilot was established for an eighteen-month period from January 2001 through June 2002. During this period, shared ride transportation providers in the Pilot counties registered persons with disabilities and offered shared ride service at an 85% discount on regular public fares. The eight counties were selected as collectively being representative of rural Pennsylvania. That “sample” provides the basis for projecting statewide ridership and budget estimates. The eight participating counties were:

- Cumberland
- York
- Washington
- Greene
- Schuylkill
- Elk
- Jefferson
- Clearfield.

1.4.1 Pilot Goal, Objectives, Design

The goals and objectives of the Rural Transportation Pilot Project for Person with Disabilities were

- To develop reliable quantifiable data on the need, demand and costs of the Pilot Project to be used in estimating statewide program guidance.

- To develop recommended program parameters, policies, evaluation criteria and costs for development of a statewide program.

- To use the existing infrastructure and service of the established shared-ride transportation providers as a base.

- To provide only supplemental trips at discounted fares to persons with disabilities (i.e., all other funding streams would continue to provide and/or pay for their respective, eligible trips).

- To at least maintain the pre-existing level of service quality provided by the shared-ride systems.
The Pilot Project provided a myriad of data ranging from ridership, operating and productivity statistics and passenger demographics to trip purpose and customer satisfaction. During the Pilot the following questions were considered:

1. What is the estimated annual ridership statewide?
2. What is the estimated cost of a statewide program including capital and operating costs, as well as administrative and related costs (e.g., program marketing)
3. What will be the benefits of a statewide program for the Commonwealth?
4. What operating or administrative issues surfaced in Pilot implementation that should be addressed to help ensure a cost effective statewide program?
5. What types of data should be collected to ensure sufficient Commonwealth program oversight?
6. What issues still remain unclear, that should be further considered in program design?

1.4.2 PwD Current Status

Pennsylvania’s FY 2002-03 budget provides $3 million for Transportation for Persons with Disabilities (PwD) in Rural Pennsylvania. Of this total, approximately $1.2 million is available to maintain discounted fares in the eight pilot project counties. The $1.8 million balance will expand discounted fares into several additional counties. PENNDOT is responsible for the administration of grants for this purpose.

• Program Goals

The following goals and objectives provide overall direction for the Program:

• **Provide Effective, Efficient, and Safe Transportation Services to Person with Disabilities**—the program’s primary goal is to provide services that help persons with disabilities to access employment and services as well as to participate in other community activities.

• **Maintain a Strong Maintenance of Effort In Relation to Other Funding Sources**—transportation for persons with disabilities is provided through several varied programs. The Rural Transportation Program for Persons with Disabilities is structured to be the payer of last resort. The funding from pre-existing programs must be maintained so that this new funding source meets unmet needs rather than replacing existing resources. Operators are required to have administrative steps and record keeping systems to support this critical program goal.
• Work In Partnership with the Disabilities Community in Program Start Up and Implementation—The development of mutual understanding and collaboration between the service provider and persons needing/using the transportation service is essential to a successful operation that meets customer needs. Offering discounted fares to persons with disabilities creates the opportunity to assess their needs and take that information into consideration in evaluating overall service and in modifying services if possible without compromising capacity, productivity and quality of service issues. Operators are encouraged to foster sound service through meaningful interaction and involvement of the disabilities community and their representative organizations and associations, along with representatives of other passenger groups.

2 Key, Issues, Challenges, and Opportunities

The following section provides an overview of several key issues, challenges, and opportunities that set the stage for more applied information throughout the implementation guide.

• Effective Program Start Up: Planning and sufficient lead time for pre-implementation activities is essential to meeting program goals and preparing to accommodate the PwD funding source and riders with existing shared-ride systems.

• Service Marketing: Effectively marketing the service will make persons with disabilities aware that the discount is available and will ensure that they understand how to access and use the service.

• Estimating Capital Equipment Needs: A key challenge for providers in implementing this segment of discounted transportation is making sure that they have adequately prepared for the level of service demand that will be added to their systems. This is especially true for peak period service when work trips are requested. It is important that discounted fares are available only when there is fleet capacity to address the additional demand.

• Local Advisory Committee Evaluation/Formation: A local advisory committee can be invaluable to shared ride providers to not only help with marketing and overall service awareness but also to serve as a feedback mechanism for the provider in assessing service planning and delivery.

• Administration, Data Collection & Record-Keeping: This is a new program and as such has potential to be scrutinized closely to make sure that the program is meeting its goals/objectives –
especially while providing quality public transportation. PENNDOT will need your assistance in maintaining good records and accurate data collection activities/reporting.
Section 1: Implementation Process

The implementation guide provides a step-by-step process for shared-ride transportation providers to assess their readiness for offering discounted fares to persons with disabilities and to complete a grant application for the Rural Transportation Program for Persons with Disabilities. The guide presents the “big picture” of key program management areas and is cross-referenced to specific sections of the PwD “expansion” application. The implementation process flowchart—Figure 1—shows the critical path to implementation. This guide is organized into sections, which correspond with each major step of the flow chart. Each section presents:

1. An overview of the step or action,
2. The process steps or content description of the item,
3. The expected results or outcome of the step,
4. And relevant tools and checklists related to the step.

Several appendices appear at the back, including a users guide for the Data Collection and Registration Access Database developed during the Pilot.

1.1 Implementation Schedule

Table 1 presents the anticipated PwD Program implementation schedule. The schedule anticipates selection of the program expansion counties by October 2002. The selected grantees will then prepare for implementation between October 2002 and March 2003.

Table 1: Approximate Implementation Schedule.

<table>
<thead>
<tr>
<th>Month</th>
<th>Milestone</th>
</tr>
</thead>
<tbody>
<tr>
<td>July/August 2002</td>
<td>Pre proposal Forum</td>
</tr>
<tr>
<td>September 2002</td>
<td>Applications Due/Evaluation/Selection</td>
</tr>
<tr>
<td>October 2002</td>
<td>Program Award</td>
</tr>
<tr>
<td>October/November 2002</td>
<td>Kick-off Meeting with Selected Grantees</td>
</tr>
<tr>
<td>Month</td>
<td>Milestone</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>December 2002 – May 2003</td>
<td>Pre-Implementation Planning /Data Collection</td>
</tr>
<tr>
<td>Feb/March 2003</td>
<td>Begin Program Implementation</td>
</tr>
<tr>
<td>July 2003 – June 2004</td>
<td>1st Full Year of Service</td>
</tr>
</tbody>
</table>

2 Key Provider Roles and Responsibilities—an Overview

The following presents the 5 key roles and responsibilities of shared-ride transportation providers in implementing the PwD program. The primary role of the providers is to offer efficient shared-ride public transportation service to satisfy as much transportation need as possible within available resources.

1. **Service Planning and Start Up**: Continuing to meet the needs of current shared-ride passengers while accommodating the increased demand for shared-ride service generated through discounted fares for persons with disabilities are essential principles of the PwD program. Pre-implementation service planning and start-up activities based on a thorough examination of current resources, procedures, and demand for service are critical to determine opportunities for improvement and service gaps to be addressed prior to implementing discounted fares for persons with disabilities.

2. **Service Provision and Coordination**: Providers will continue to deliver their public transportation services; however a new ridership base will be added to the system. At a minimum, during the first year of service, the PwD program users will require additional coordination and administrative efforts.

3. **Marketing**: During the first year of service, providers will perform some level of market outreach to persons with disabilities to ensure an awareness that the service is available and that those interested can understand how to access/use the service.

4. **Program Evaluation**: A key program emphasis centers on data collection, analysis and resultant service adjustment to meet system user needs. The providers will collect and analyze data prior to implementation and from that point forward on a regular basis. The information will form the basis of evaluating both the program and of recommendations for adjustments to service.

5. **Reporting**: Ultimately, the data collection and analysis will be reported on a regular basis to the Department as part of the program reporting requirements. A key to success for this
process will be for the providers to incorporate the data collection and reporting requirements in this program into the “normal” functions of the staff.
Figure 1 — The Implementation Process

Program Understanding/Familiarization

Conduct Self Assessment

Preimplementation Data Collection

LAC Formation

Core Grant Application Elements

PwD* Planning

Grant Application

PENNDOT Decision

Marketing Plan

Prepare for PwD Start-up

Implementation

Plan Service Adjustments

Management/Monitoring Process

Collect Data

Reporting

Evaluate/Analyze Data

* PwD – Discounted Fare Transportation Program for Persons with Disabilities
Section 2: Program Understanding and Familiarization

1 Overview

Achieving a comprehensive understanding of the PwD program requirements is the key first step for any provider considering offering discounted fares to persons with disabilities. The PwD program should not impact service delivery nor should program implementation be viewed simply as a new funding source. The program requires providers to invest time in service delivery planning and preparation as well as some administrative time in implementing the service. The PwD program has specific goals and objectives, not the least of which is to provide the “funding source of last resort.” Another key objective is to not degrade the current level or quality of service currently available. Providers must make sure that they:

- Have accurate operating and financial data statistics on the current shared-ride services to form the foundation for service analysis and comparison after implementation
- Are knowledgeable about other programs that provide or fund transportation for persons with disabilities and
- Have adequate resources (e.g., equipment and staff) to maintain the service and productivity levels.

2 Steps

The following steps or checklist items have been outlined to ensure that prospective PwD providers review the available program materials and have a thorough understanding of the program requirements for planning, grant application development, and implementing service.

- Review the Program Goals and Objectives: The Program Goals and Objectives are included in the implementation guide introduction.
- Review the PwD Expansion Criteria: Exhibit 1 is the PENNDOT developed expansion system evaluation criteria. Five criteria form the basis for that evaluation and selection. The same document explains how
potential grant applicants will be evaluated and ranked for funding consideration in fiscal year 2002-03.

- **Review the PENNDOT Rural Transportation for Persons with Disabilities Pilot Project: Guidelines for Interagency Coordination and Maintenance of Effort Obligations: Exhibit 2** presents the interagency coordination guidelines used for the Pilot Project. These guidelines are in effect for the PwD Program as well.

- **Review the PwD Grant Application**: A copy of the grant application for new systems is included as Exhibit 3.

- **Review the Remainder of this implementation guide**: The implementation guide can be of great assistance in completing the grant application and planning for PwD implementation. A review of this document will provide the applicant with a good working knowledge of program philosophy and management policies as well as other implementation considerations.

- **Review the Pilot Customer Satisfaction Survey Results**: A customer satisfaction survey was conducted during the Pilot Project. The survey results will provide prospective providers with a demographic profile, frequency of usage, trip purpose and service satisfaction of the service users.

- **Review the Pilot Registration Report Results**: During the Pilot Project, registration information for persons in the Pilot was recorded in a Microsoft Access database. The report gives prospective providers an overview of the registration requirements for the program and a demographic profile of Pilot registrants.

- **Review the Pilot Evaluation Report**: During the Pilot a program evaluation report was developed that provides a detailed assessment of the Pilot Projects and presents both ridership and cost projections as the basis for estimating the scale of a program expansion on a statewide basis.

- **Complete the Potential Provider Implementation Planning Overview**: Attached to this section of the implementation guide is a prospective provider planning checklist or Go/No-Go questionnaire that is designed to help providers assess their readiness to become an expansion provider. The form included as Exhibit 4 is designed to help providers reach a Go/No-Go decision to apply as an initial expansion system.

## 3 Outcome

Upon completion of these steps, the provider will have a better understanding of the PwD program as well as the requirements necessary to expand and implement the program in their respective regions. This process
will also help providers make an informed decision of when they should consider applying for a PwD grant to offer discounted fares.
Section 3: Conduct Self Assessment

1 Overview

Prior to PwD program implementation, providers should broadly assess the readiness of their current system including administration and operations. This assessment allows providers to gauge their respective levels of preparedness to accommodate the increased demand for shared-ride service generated by the PwD program in relation to the capacity and constraints of their existing shared ride programs. It also provides a forward-looking opportunity to identify areas of the operation requiring additional/updated equipment, additional staff, and financial support in order to offer discounted fares to persons with disabilities.

Exhibit E of the Rural Transportation for Persons with Disabilities Program Expansion Projects Application Form requires the applicant to answer multiple self-assessment questions. The questions are organized around several main topic headings. The following sections list and describe the importance of the major topic headings found in Exhibit E and are meant to facilitate the providers’ completion of that portion of the application.

Exhibit 5 of this implementation guide provides a self-assessment questionnaire that contains the required evaluation elements of the expansion application.

2 Steps

- Develop a System Profile and Analysis

The system profile analysis allows the provider to take a holistic look at the existing shared ride system and assess gaps and opportunities in order to determine whether service improvements/enhancements are needed to accommodate the PwD subsidy program. The completed system profile then becomes a primary component of the PwD implementation plan.

The system profile analysis examines the elements of the existing shared ride system such as:
• Current service area including the identification of underserved areas.
• Population of service area including estimates for the PwD population.
• Current vehicle fleet and its adequacy to meet the demands of the ridership generated by the PwD subsidy program.
• Fare structure.
• Service hours and limitations.
• Driver staffing and subcontractors.

**Conduct an Administrative Review**

This section of the self-assessment analyzes such factors as:

• Number, roles, and responsibilities of staff.
• Policies and procedures for handling issues such as complaints and no-shows.
• Public outreach efforts and customer satisfaction evaluation.
• Equipment and software needed for service delivery.
• Data collection and reporting procedures for ongoing service monitoring and evaluation.
• Reservation, scheduling, and dispatching systems.

Enhancements to the shared ride system in support of the PwD subsidy program could require corresponding enhancements to the system’s administrative support infrastructure. The additional transportation demand and ridership could require additional staff, upgraded equipment, new policies, or other resources to continue the delivery of quality shared ride service. As you answer the self-assessment questions, identify gaps and opportunities for improvement for inclusion in the pre-implementation plan.

**Review and Document Operating Standards**

The operating standards or policies of a shared ride system help passengers to understand how to use the system and what to expect with regard to arranging appointments, transportation pick up and delivery times and the level of assistance available.

Review existing shared-ride operating standards in light of the additional transportation demand and ridership generated by the PwD subsidy program. Additional ridership and increases in passenger assistance may require modifications to the shared ride operating standards to ensure the maintenance of service quality consistent with established and published standards. The following operating standards should be considered:
• Standard pick-up and destination windows
• On-time performance for pick-ups and deliveries
• Level of assistance, for example: curb-to-curb, door-to-door, assistance with packages, etc.
• Passenger assistance, sensitivity and other training courses that may be needed by drivers.

• **Analyze Operational Capacity and Areas for Improvement**

  The PwD subsidy program is not a new transportation service, but rather makes existing transportation more affordable and accessible to persons with disabilities, thereby increasing their mobility and transportation choices. Transportation demand and ridership increases over present levels in your system can be expected with the implementation of the PwD subsidy program.

  The operational capacity of the existing system is a key consideration for providers implementing the PwD subsidy program. Providers must identify and address shortfalls in their operations to insure that **all users**, both existing and PwD, will have access to shared-ride transportation services. In addition to the steps outlined above, providers should consider the following:

  • Staffing and workload/management capacity for additional oversight.
  • Operational changes required to insure continued service quality.
  • Peak service hours and underserved service hours.
  • Underserved service areas.

**2.1 Outcome**

The self-assessment assists shared-ride transportation providers and their local advisory committees to:

• Compare the potential demand to the existing operational and administrative capacity of their existing system.
• Identify overall system enhancements needed to properly accommodate the demand generated by the PwD subsidy program.
Section 4: Pre-Implementation Data Collection

1 Overview

Operational data for the existing, pre-implementation shared ride system must be collected to evaluate the PwD subsidy program’s impact on individual system productivity and ridership. In short, it is important to do a “before and after” type review. Prior to implementing the PwD program, each provider is required to collect and analyze a set of baseline performance data. This pre-implementation data will serve as a baseline upon which post-implementation data can be collected and compared. This data collection is not a new requirement. It is the same process used for the annual required data collection sample for the Shared Ride Program.

Although each provider in the Commonwealth is required to collect this data and report it to PENNDOT on an annual basis, the Pilot Project has demonstrated significant variation in how the data is collected and reported. Exhibit 6 includes PENNDOT Shared Ride Data Collection Requirements. In many cases, key statistics such as live miles and live hours are not calculated correctly, yielding an inaccurate assessment of a system’s productivity. Through the Pilot, a Microsoft Access database was developed allowing the provider to enter the one week sample of driver’s logs—the required statistics were then automatically produced as a function of the database setup. It is important to note that this database was designed for the casual user. Operators will not require highly sophisticated computing skills to use the database.

This section describes the major steps for conducting the pre-implementation data collection.

2 Steps

- Review Access Database Tool and Data Collection Requirements

During the Pilot Project, the Microsoft Access Database tool proved to be a useful and efficient means for provider data collection and analysis. The Access Database and an accompanying help file is included with this implementation guide for use by the providers. The database requires the provider to collect a complete week of drivers’ logs with the route name, day
start and stop time, a day start and stop mileage as well as the following information for each trip provided:

- The time and odometer reading for each passenger when boarding the vehicle
- The trip sponsor (funding agency)
- The time and odometer reading for each passenger when exiting the vehicle.

**Determine Data Collection and Analysis Method and Test for Accurate Calculations**

The Access Database is just one tool to assist providers to accurately calculate the required statistics from drivers’ logs. Many providers currently either use their existing scheduling software, spreadsheets or manual methods to perform the data collection/analysis that is required under Shared Ride.

As the Pilot providers submitted their bimonthly data collection results, it was discovered that the calculations used for live miles and live hours were incorrect. Either the existing scheduling software did not have the calculations properly programmed or mistakes were made while manually analyzing drivers’ logs. As a result, an Access Database was developed to assist providers and the Department in assuring that these calculations were correct. The database has built in data entry-checking features designed to identify most data entry errors, allowing for immediate corrective action. Exhibit 7 is the help file for the Access Data Collection and Analysis Database.

Data entry is time intensive, especially for systems with a large number of trips. To reduce the amount of time needed for data entry, the database also has a feature that allows a provider to import scheduled trip information from an existing electronic data source to help speed the process.

Another option to using the database would be for each provider to work with their individual software vendor to incorporate the data collection required calculations into the provider’s existing trip scheduling software. Even with this option, the provider still must make sure that each trip’s details from the drivers’ logs are updated in the scheduling program before submitting the data collection statistics.

**Collect and Analyze Service Data**

The pre-implementation data collection is a critical part of this Program because it provides a baseline of system productivity and ridership data to isolate or identify any impacts that the PwD program has had on overall system productivity and costs. Accurate data collection is critical to the Commonwealth and the future of this program to analyze the impact of
offering discounted fares to persons with disabilities on current shared-ride operations.

In addition to the Programmatic need for accurate data collection, each provider will have a basis for assessing system and regional productivity trends. This will give the providers the data necessary to make decisions on how to manage system productivity by region/route and a basis for fare structure adjustments.

Exhibit 8 of this Implementation Guide provides a schedule checklist of the steps necessary for the required data collection on a bi-monthly basis.

Exhibit 9 is a Microsoft Excel Spreadsheet that can be used to track data collection results over time. The spreadsheet has a set of instructions on the first worksheet that explain how to enter summary data. The last worksheet in the workbook is a set of graphs that are updated as each set of data collection results, monthly ridership and costs are entered into the data entry portion of the workbook. For each graph, space is provided to allow the user to identify notable trends or key facts related to the data. This tool is not a PENNDOT requirement but is provided to assist the transit operator to track and analyze key operating/financial statistics over time.

Exhibit 10 is an example driver’s log illustrating the data that must be recorded for each trip during the data collection week.

• Expansion Application Data Requirement

Exhibit J of the Rural Transportation for Persons with Disabilities Program Expansion Projects Application Form outlines the baseline information that is required for the pre-implementation data collection for the service expansion grant proposal. The following information is required by the application:

• Name of funding sources currently used for shared-ride trips.
• Number of trips for each funding source.
• Number of persons served for each funding source.

The provider is also responsible for reporting pre-implementation data on transportation services in their area that are provided by other entities/programs. The Local Advisory Committee (LAC) or local elected officials may be good sources to collect information on subcontractors such as:

• Name of other service providers.
• Number of trips per provider.
• Number of persons served for each provider.

In addition to the data highlighted above, other pre-implementation operational data can be useful to monitor and evaluate the performance of
the shared ride system in light of the additional demand created by the PwD subsidy program. Much of this data is also required as part of Exhibit F of the Rural Transportation for Persons with Disabilities Program Expansion Projects Application Form. Examples of such data include:

- Total passenger trips
- Paid driver miles
- Vehicle miles
- Cost per trip/mile

3 Outcome

Analysis of the pre-and post-implementation data will allow the provider and PENNDOT to assess the success of the PwD subsidy program and identify any impacts that the additional demand may have on the shared ride system.

The data collection efforts serve as a monitoring and evaluation tool to justify service alterations that respond to the evolving needs of all shared ride users. Data collection efforts are simplified and streamlined through the use of the Microsoft Access Database, thereby limiting extra demands upon staff.
Section 5: Local Advisory Committee Formation and Structure

1 Overview

Each provider offering discounted fares to persons with disabilities is required to have a local advisory committee (LAC) including a cross section of service users. The LAC also may be organized to include a subcommittee focusing specifically on persons with disabilities. That subcommittee would report back to the overall LAC. For the PwD program, the LAC functions include:

- Providing insight to the service provider on service market and area coverage.
- Assisting with development of a marketing approach and implementation of marketing the overall awareness of the PwD Program.
- Assisting with registration and eligibility verification.
- General advice and input to the provider on service issues.
- Serving as a mechanism for the provider to share ridership and other related statistics, information on service planning, marketing, funding, etc.
- Note: the LAC is just that…an advisory body not directly responsible for any decision-making.

The local advisory committees served an important function during the Pilot providing the Pilot Providers with ideas, insights and new perspectives with respect to the transportation needs that exist in the region for persons with disabilities.

Initial meetings of any LAC will focus on introductions, getting to know each other, gaining an understanding of how the service operates, as well as developing an understanding of the expectations of the disability community. Committee members should be encouraged to candidly express their perception of public transportation—concerns, suggestions, unmet needs, etc. Identifying and addressing (sometimes correcting) customer perceptions and expectations early in the process contributes to mutual understanding and helps to create a direction for the group which will benefit future meetings. The roles, responsibilities and authority of an Advisory
Committee should be printed and explained at the first meeting. The following steps describe how to form an LAC as part of implementing the PwD Program.

2 Steps

- **Identify the size and composition of the LAC:** Providers should evaluate their current ridership and select current service patrons that are representative of the varied funding sources and trip purposes served in the system.
  - The LAC may also include subcontractors and local agency/advocacy organization representatives as well.
  - The provider should work with the local disability advocacy groups to include persons with disabilities on the committee.
  - The committee candidates should be expected to set aside a minimum of two hours every quarter for committee meetings.
  - Each committee member may also want to designate an alternate to attend in their absence.
  - Exhibit 11 is a checklist of potential committee members for consideration.
  - Subcommittees may be established to focus on specific issues or opportunities. Subcommittees should be given a charge by the entire committee to perform research and present findings or research results to the entire committee. Exhibit 12 provides a checklist of potential subcommittees.
  - The providers should make sure that the patrons on the committee are regular users and don’t just use the service 1 or two times per year.

- **Establish an LAC charter:** Upon creation, the local shared-ride provider may want to establish a set of expectations and roles/responsibilities for the LAC. A charter is just one way to provide a formal charge to the committee members. Exhibit 13 provides a template to consider in creating a charter for an LAC. The provider should manage the committee membership and meetings so that the meetings result in the constructive and candid exchange of information and positive results.

- **Conduct initial meeting:** The initial meeting should focus on committee organization, roles/responsibilities of members. A proposed agenda for the first meeting is included in Exhibit 14.

- **Establish regular duties/activities:** At the first meeting, the provider should hand out the expectations for the LAC. Exhibit 15
provides a set of activities that the LAC could concentrate on during the 1st year of the PwD Program to assist the provider.

- **Meet on Regular (at least quarterly basis):** The LAC should meet on at least a quarterly basis to provide input and feedback to the service provider

## 3 Outcome

At the end of this section, the prospective provider will have developed an LAC listing. The provider will have the tools to organize the first LAC meeting including an initial agenda and a proposed charter for the committee.
Section 6: PwD Planning

1 Overview

Once the self-assessment is conducted, a shared-ride provider must consider the impacts of integrating the PwD program with other existing services and determine the need for administrative and operational resources and adjustments to accommodate the integration. Prior to implementing the PwD program, you will need a plan for integrating the program with your existing system. At a minimum you will need to address the following:

- Review and document current policies and procedures.
- Estimate the market and demand for transportation for persons with disabilities.
- Determine current gaps in serving the identified market.
- Develop a plan to fill the gaps – this will include service planning, equipment, staff and driver deployment.

The PwD planning process should be used to help determine needs for the grant proposal to PENNDOT. The program ridership will grow over time; during the first six months of service you will be able to adjust your service plan to meet the actual service demand.

2 Steps

The key steps and consideration areas for this task are:

- **Data Collection and Analysis:** one of the first requirements to consider is data and analysis. Each provider considering this program must agree to collect and analyze service-operating statistics as the basis for assessing the system both before and after PwD program implementation. The Pre-implementation Data Collection section describes the data collection and analysis procedures and provides a database tool to help providers conduct the data collection analysis.

- **Management Plan:** Ultimately, service delivery and quality is the responsibility of the operator’s management team. The operating procedures for both office and on-road service delivery should be clearly
defined and communicated with staff so they can function efficiently and with the knowledge to handle day to day questions and service delivery situations. The self-assessment step will result in an overview of your current system procedures. Exhibit 16 presents considerations for a shared ride management plan. You should consider developing various tools to help organize and manage your system, such as the elements listed below:

1. Complaint and emergency procedures
2. Service standards
3. Management and organization structure with job descriptions
4. Standard operating procedures or job requirements for staff positions
5. Information sharing procedures
6. Frequently Asked Questions for Reservationists and directions for how to address regularly occurring situations.

- **Operations planning and service adjustments:** Public transportation is a constantly changing business. As development occurs, for example, the desired origins and destinations for travel change over time. As a provider, you should be aware of these shifts and have a method to evaluate when and how to make market based service adjustments. PwD implementation provides a good opportunity to evaluate how well your service satisfies the existing public transportation demand. The following steps should be considered to evaluate the potential demand for service by persons with disabilities:
  
  o Work with your local regional/county planning staff to obtain census mapping of the geographic concentrations of persons with disabilities in your service region based upon the 2000 Census.
  
  o Map your current service structure so you understand how your service is being delivered geographically in relation to the geographic concentrations of persons with disabilities.
  
  o Assess demand for transportation. Based on the Pilot experience, ridership associated with this program will be a relatively small percentage of overall system ridership--ranging from approximately 3% to 10% of total monthly trips. The Pilot Project Evaluation report includes an assessment of the eligible population for PwD service in each Commonwealth County based on 1990 Census figures. It also contains an estimate of the projected ridership, operating and capital costs for the implementation of the program in each County. These estimates provide a good base to plan for potential demand. To further refine or improve those estimates, you should consider the following:
- **(Optional – but recommended for those considering implementation beyond 02-03)** Conduct a targeted survey to help assess the local geographic demand for service. *(See Exhibit 17 for example from the original TAC Study)*

- Examine your current ridership base for persons with disabilities. Those with disabilities currently using the service will likely register to use the PwD program and will use this program for trips not funded/sponsored by another agency

- Work with your LAC or local advocacy/state agencies to identify service area gaps. It is a challenge to assess actual demand by geographic location. There is no good rule of thumb; as a provider you make judgments about the service demand that can be expected based on the information you subsequently collect and analyze. Over time these patterns of course will begin to develop.

- **Equipment Needs:** Implementation of the PwD program will require you to examine your current office equipment and vehicle availability as well as future needs.

  1. **Vehicles:** Over 50% of Pilot trips were work related. Most if not all of those trips probably occurred during peak system service usage times in the AM and PM travel peaks. Work trips are time sensitive; for the program to be a success, work trips must be provided on time. In addition, one of the key PwD program objectives is to add trips without service degradation for existing users. Depending on your peak vehicle requirements, this may require your system to add vehicles and drivers to meet these trip demands. PENNDOT’s web site now has a vehicle specifications database you can use as a reference in identifying available vehicle options to meet identified needs. *(Exhibit 18 presents instructions for how to access the site).*

  2. **Office equipment:** The self-assessment tool includes questions on both phone and computer usage/capacity. If your phone and computer systems are limited in capacity, you may need to consider upgrading your phone system and/or adding additional computer equipment. The phone systems are your first line of customer service to insure that both current customers and additional customer segments will be able to contact you.

  3. **Staffing –** During the first year of the PwD program, additional administrative requirements will be required including collecting and verifying registration data, marketing the PwD program and training riders/answering questions about the service. You will need to have a good assessment of your current staff workload in
the self-assessment and determine your future office staffing needs. The staffing needs should be identified as short-term (first year) and long term. Additional drivers may also be needed if your current drivers are at capacity.

- **PwD Fare Planning** – Preparing for PwD Program implementation presents a good opportunity to evaluate your current fare structure related to trip length and geographic service coverage. The Pilot Providers had varying experiences with regard to average trip length for Pilot trips in comparison to the average trip length for all shared ride trips. Some providers had longer Pilot trips on average and others had shorter Pilot trips in comparison to the system average. You should review your current fare structure to make sure that you have an equitable fare for short and long trips. For example, if you have a mileage based fare structure with your longest trip cost capped at 10 miles you may need to adjust your fare structure upward to properly set fares for those longer trips. If a trip were 20 miles in this example, the person would pay the same amount as a trip that is 11 miles long. If trips are longer distance, then you may want to adjust your overall fare structure to make sure that people taking longer trips are paying their fair share. This is important to help reduce the need for an overall fare increase to cover trip expenses.

- **ADA Complimentary Fare vs. PwD Fare**: If your complementary paratransit fares are higher than 15% of the shared-ride fare, then you should establish the PwD Program fares to match the complimentary paratransit fare at a minimum to create equity in fare charges.

- **Service Coordination** – Prior to implementing the PwD Program, you should consider how the Program would be coordinated with other programs serving persons with disabilities in your region. The PwD Program is **The Funding Source of Last Resort**; as such you must consider all options to deliver a trip prior to assigning the trip cost to the PwD Program. At a minimum you need to consider coordination for the following:
  - **Funding sources**: Every other funding source must be considered prior to assigning a trip to PwD. For example if a person is eligible for Medical Assistance Transportation (MATP), then the person must use MATP for appropriate medical trips.
  - **ADA Complementary Paratransit Coordination**: If a trip can be delivered by ADA complementary paratransit, even if the service is not as convenient as that provided through shared ride, the trip must be referred to complementary paratransit service.
  - **Other Systems Coordination**: If there are other transportation providers in your region that provide discounted transportation for various trip types then you should refer a person to those providers for appropriate trips.
• **Develop or Explain Transportation Policies:** One of the key lessons learned from the Pilot Project was that many of the persons with disabilities that registered to use the program had never used shared ride before. This resulted in requests for “training” on how to use the service. Exhibit 19 presents a checklist of policies and procedures that you should consider in preparation to implement the PwD Program. During the Pilot, RabbitTransit and ATA developed a “users” guide explaining how the Pilot worked and how to use the shared ride system. Exhibit 20 provides a copy of those guides for your consideration and use in planning to implement the PwD Program. While planning to implement the PwD Program, each system is strongly encouraged to document all policies in writing for administrative staff as well.

• **Eligibility and Registration:** Exhibit 23 presents the eligibility and registration forms that must be used to register and determine eligibility of potential PwD Program participants. The Access Database program has a section for the provider to enter and track persons with disabilities who are registered to use the PwD Program.

• **Develop Project Budget:** As part of your application to PENNDOT you must develop a proposed project budget for both Capital and operating expenses. Exhibit 24 is a template for developing your proposed budget for the PwD Program implementation.

• **Develop Implementation Action Plan:** In addition to the elements discussed in this section, you may identify other specific gaps that your system needs to address prior to implementing the PwD Program. Exhibit 25 is an action plan template that you may want to consider using to track all of the tasks that need to be performed.

### 3 Outcome

Upon completion of these steps, the provider will have a general PwD implementation action plan and budget with identified strengths and challenges as well as the projected service changes needed prior to PwD implementation.
Section 7: Grant Application Development

1 Overview

PENN DOT developed a grant application for operators who wish to apply for inclusion in the Rural Transportation for Persons with Disabilities Program. The application can be found in Exhibit 2. The application can also be accessed from the PENNDOT website. Exhibit 26 presents the directions to access the application from PENNDOT’s website. It requires the grant applicants to demonstrate program readiness—readiness in terms of having accurate baseline information on their current system and on current local transportation services for persons with disabilities, and having analyzed what is necessary to adequately address an additional demand for service when discounted fares are offered to persons with disabilities. The implementation guide steps and tools are designed to assist each provider in gathering the necessary information to complete the Grant Application.

A selection committee will evaluate the completed grant applications. The basic task for this part of the implementation guide is to complete the application.

The following items should be considered in completing the grant application:

1. Is our system ready this year or can we be ready this year to implement this program effectively? -- The Go-No/Go Checklist presented in the first part of this implementation Guide (Exhibit 4) should be followed as the basis for answering this question.

2. Develop an outline for each section of the application – Prior to developing each section of the application, you should prepare an outline that will help to guide the application development. The outline also provides you with the opportunity to capture key ideas that should be highlighted in your application.

3. Complete a draft of the application – the application requires numerous attachments; each attachment must be completed and be supported with appropriate documentation. Focus on providing concise, accurate and complete sections.

4. Proofread and review the application draft for accuracy and completeness: This is a key step to make sure that the application is...
clear and complete in all parts. Exhibit 27 is a review and editing checklist that can be used to make sure that the application has been thoroughly reviewed.

5. Review the draft application with the Local Advisory Committee (LAC) – the LAC can review the draft application to make sure it is not only reflective of the current system but that it also is reflective of the service users. The LAC should be involved during the application development process to provide input into the self-assessment and service planning steps as well.

6. Present draft application to Board of Directors/decision makers for approval – The application should be approved by the appropriate decision-makers at a local level before submission. That approval must be indicated in the submission.

7. Submit the locally approved application (original and three copies) with supporting materials to PENNDOT for consideration by September 6, 2002.

2 Outcome

The key outcome of this task is a complete application submitted to PENNDOT by the designated deadline.
Section 8: Prepare for PwD Start-up

1 Overview

In developing your grant application to become an expansion system, you will need to have a Program implementation plan developed and in place. This section of the implementation guide identifies the major areas that will need to be addressed by your system in preparation for PwD Program start-up. This start up includes all aspects of the service planning implementation, equipment procurement, and marketing material development. The system is encouraged to develop an implementation action plan and submit the action plan to the Department. Before actually beginning service delivery, the system should submit a final action plan showing the completion status of each program implementation activity. It is expected that the program will be fully implemented within 3 to 6 months from the time that Grants are awarded depending on completion of start up activities.

2 Steps

The following general steps should be followed to prepare for PwD start-up. Each provider will need to further define individual actions that will need to take place depending on individual system needs.

1. Develop an implementation action plan – an action plan template has been provided as an attachment to this section. The action plan should at a minimum contain work steps or actions, target dates for completion, individual responsibility and a status column for status reporting and tracking. The action plan should contain categories such as:
   - Procure equipment
     - Define Vehicle Specs
     - Obtain Approvals for Vehicle Specs
     - Procure the equipment
   - Prepare marketing materials
   - Hire additional staff if needed
- Conduct staff training.
- Implement service planning changes (if needed)

2. Conduct at least one service planning meeting with the local advisory committee prior to implementing the program.

3. Prepare a press release and implement advance marketing at least two weeks before the program starts.

4. Conduct a workshop including written staff guidance with staff to review the Program objectives and requirements. Exhibit 28 presents a sample agenda for that meeting.

5. Ensure that data collection procedures are in place.

6. Conduct other outreach beyond the LAC including but not limited to service organizations, chambers of commerce and regional planning organizations. Exhibit 29 presents a checklist of organizations for this outreach.

7. Upon completion of the preparation to implement the PwD discounted fare and PENNDOT approval, begin serving PwD trips.

3 Outcome

At the end of this task, your system will be fully prepared to implement the PwD subsidy and begin serving PwD trips.
Section 9: Marketing Plan

1 Overview

Marketing is essential to effectively communicating the availability of transportation services. A marketing plan is especially important for providers who are implementing the PwD subsidy program. The PwD subsidy program applies to a population that previously could not avail themselves of discounted transportation (with the exception of services based programs), and therefore may be unaware of the new mobility opportunities.

2 Steps

The Rural Transportation Program for Persons with Disabilities Marketing Toolkit includes comprehensive information for providers to develop and deploy a marketing campaign. The major topic areas are briefly described below. Please consult the toolkit for more detailed information on each area.

- **Customer Service** – Assists providers in organizing their staff and transportation service to meet and exceed customer expectations for the PwD subsidy program.

- **Public Relations** – Identifies methods such as websites, brochures, and logos that can be effective media for disseminating information on the PwD subsidy program.

- **Public Outreach** – Suggests techniques to gather public input on the PwD subsidy program that can be used to improve service and related public perception.

- **Attracting New Riders** – Reviews strategies to familiarize new customers with the service so that a comfort level can be achieved that contributes to high levels of ridership and ultimately word of mouth marketing.

- **Promotions** – Outlines promotional strategies such as “Buddy Days” or group trips that can further increase interest in the service.
3 Outcome

A successful marketing program performs four important tasks for transit providers:

• Establishes a customer-oriented focus for service delivery.

• Provides information on the PwD subsidy program throughout the community via a variety of media that reaches as many potential riders as possible.

• Incorporates public comment on the service via public outreach events.

• Conducts regularly scheduled promotions that help to attract new riders while maintaining the existing customer base.
Section 10: Management and Monitoring Process

1 Overview

Shared ride service in the Commonwealth is diverse, with numerous funding programs and users, including the general public. This diversity of funding sources and programmatic purpose underscores the need for continuous service monitoring. It also speaks to the importance of program evaluation as the key to maintaining funding integrity and to best meet the transportation needs of its patrons.

Providers should develop a local management and monitoring process that allows for a structured approach to this ongoing assessment. The analysis of system performance information is at the core of program management and monitoring. Figure 1 in Section 2 of this guide (Implementation Process), illustrates the management and monitoring process. The steps below explain the basic cycle for managing/monitoring shared ride service using the tools presented throughout this implementation guide.

2 Steps

A sound management and monitoring process includes four basic steps that are described below.

1. Implementation – Providers may follow the process outlined in this users guide to implement the PwD Program. Operational implementation, such as new equipment and service planning, should be accompanied by administrative implementation, which includes elements such as staff training and policy development.

- Identify Performance Objectives and Measures—as part of implementation planning the operator should also define some key performance objectives and the way in which progress will be measured. This can rely upon the data formally collected through the reporting requirements, other locally developed measures, or a combination of the two. The fundamental point is that the operator should define its short and longer-term program and service objectives and determine a way to track and measure progress toward meeting those objectives or standards. Performance measurement
can also include more qualitative metrics such as customer satisfaction levels (as determined through surveys or focus groups) and changes in those levels over time.

Customer surveys do provide an excellent means for gauging satisfaction and identifying issues or concerns that might not surface otherwise. Exhibit 30 shows the customer satisfaction survey that was used during the Pilot. Expansion providers should feel free to adapt it for their own particular information needs.

2. **Collect Data** – Once the PwD subsidy program is in operation, data should be collected on its operational characteristics and service quality. At minimum, the following data elements should be tracked by the provider:
   - Passenger trips categorized by primary sponsor and age.
   - Vehicle miles
   - Live vehicle miles
   - Paid driver hours
   - Live vehicle hours
   - Average trip time
   - Trip responses
   - Formal complaints
   - LAC input (through meetings or other efforts to include the LAC in the evaluation process).

3. **Evaluate / Analyze** – Providers should evaluate and analyze the collected data on a monthly basis. Major trends, quality concerns, or service anomalies should be closely monitored. The Microsoft Access Database can assist in accurately performing data collection and analysis. The table below provides a summary of the required measures. Each is listed, defined in terms of its use and importance and interpretive data tips are provided that represent common Pilot experiences with the data. Exhibit 6 in Section 4 of this Guide provides PENNDOT definitions for the basic data collection terms.

<table>
<thead>
<tr>
<th>Performance Measure</th>
<th>Definition &amp; Importance</th>
<th>Interpretative Tips/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live Hours/veh Hour</td>
<td>A ratio of hours that riders are on the vehicle to the total number of hours the vehicle is operated.</td>
<td>An increase in this ratio indicates higher productivity. This measure can be used to evaluate the overall productivity of a specific route in comparison to the system. If this measure is low for a particular route, there may be opportunities to redeploy the vehicle geographically or examine the schedule for opportunity to make the route...</td>
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### Shared Ride Performance Measures Overview

<table>
<thead>
<tr>
<th>Performance Measure</th>
<th>Definition &amp; Importance</th>
<th>Interpretative Tips/Comments</th>
</tr>
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<tbody>
<tr>
<td>Live Miles/Total Vehicle Mile</td>
<td>A ratio of miles that riders are on the vehicle to the total number of miles the vehicle is operated</td>
<td>Similar to Live Hours/Paid Hour, an increase in this ratio indicates higher productivity. This measure can be used to evaluate the overall productivity of a specific route in comparison to the system. If this measure is low for a particular route, there may be opportunities to redeploy the vehicle geographically or examine the schedule for opportunities to make the route more productive. At a system-wide level, trends for this measure can be developed over time to be able to evaluate the system’s productivity over time.</td>
</tr>
<tr>
<td>Passenger Trips</td>
<td>The number of passenger trips during the reporting period.</td>
<td>This measure can be used on a per route basis for comparison to the system average to help identify opportunities to adjust the geographic distribution of the vehicle fleet as well as to measure productivity. If your system has vehicles of various sizes, you may use this measure to assist in determining the appropriate size vehicle to serve any given route.</td>
</tr>
<tr>
<td>PwD trips as % of total trips</td>
<td>The number of PwD trips expressed as a percentage of total trips provided</td>
<td>This ratio provides an indicator of the levels of driver assistance needed and may assist the provider in assigning drivers to particular routes. In addition, this measure can be used to assess the impact of the PwD Program on individual routes and on the system as a whole.</td>
</tr>
<tr>
<td>Passenger Miles Per Trip</td>
<td>The total passenger miles by trip provides a measure of productivity and efficiency.</td>
<td>This measure can assist in determining cost recovery for a particular route in relation to your existing fare structure. If a route has relatively high passenger miles per trip in comparison to the system average, then the route should be generating higher revenues to help cover or offset the cost of the longer trips.</td>
</tr>
<tr>
<td>PwD Trips/Month</td>
<td>The trips made by persons with disabilities per month</td>
<td>Over time this measure will provide a growth trend in rides provided by the PwD program.</td>
</tr>
<tr>
<td>Passengers/Paid Driver Hour</td>
<td>The number of passengers per paid driver hour.</td>
<td>This ratio can be used to assess cost recovery and productivity. Over time, a trend will emerge. An increasing ratio over time indicates improving productivity. If the ratio decreases over time, service adjustments may be warranted to reduce the number of paid driver hours. Remember that new programs require sufficient start up time and it may be premature to make any conclusive</td>
</tr>
<tr>
<td>Performance Measure</td>
<td>Definition &amp; Importance</td>
<td>Interpretative Tips/Comments</td>
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</tr>
<tr>
<td>Passengers/Live Hour</td>
<td>The number of passengers per hour that riders are in the vehicle</td>
<td>This ratio in combination with Passengers/Paid Driver Hour can be an additional indicator of productivity.</td>
</tr>
<tr>
<td>Average Trip Length</td>
<td>Average passenger miles per trip</td>
<td>The average trip length measure helps to “normalize” the system pattern by giving a better indicator of the mean trip length rather than the extremes at either end of the trip length spectrum. When calculated on a per route basis, this measure can help identify opportunities to improve productivity. If trip lengths for a particular route are longer than the average, or are longer than your longest trip in your fare structure, cost recovery on the route may become a problem.</td>
</tr>
<tr>
<td>Cost Per Trip</td>
<td>The average fare charged per trip.</td>
<td>Allows for comparisons over time. Also useful to compare cost per trip by funding program type.</td>
</tr>
<tr>
<td>System Average Speed</td>
<td>The average speed for the overall system expressed in Miles Per Hour per trip.</td>
<td>This measure can provide a gauge of operational impacts of service modifications or current scheduling.</td>
</tr>
</tbody>
</table>

All of the indicators presented in the table above are indicators that can help you better analyze your system. These indicators will not provide you with the answers to problems in your system; you must consider all of these indicators in the context of your local service delivery and local conditions.

4. **Reporting** – The data and analysis should be presented to the following organizations. (Note: Data Collection and Analysis must be submitted to PENNDOT)
   - Local Advisory Committee
   - Board of Directors
   - Local Elected Officials
   - PENNDOT.

The purpose is not presentation per se, but to gain additional perspectives on the data meaning and fundamentally to advance an ongoing dialogue regarding program start up and ongoing performance. Data reporting has an end, an objective, and a purpose—that is to provide good management information for purposes of decision-making and service monitoring. Decisions may be to make no changes or to
simply continue monitoring. But often, the data may suggest that adjustments should be made. It is for that reason that those with a stake in the program should be familiar with the data findings. Elected and appointed officials will be more likely to support a program they are familiar with and decisions based on well documented and analyzed financial and operating data.

5. **Adjustments** – The provider should adjust the operational and administrative elements of the shared ride service to respond to the data collection and analysis findings. Potential adjustments could include:

- Route modification / service addition (in terms of hours of service – earlier start, later finish, additional drivers/vehicles during peak periods and in terms of service area.)
- Staff training and awareness efforts
- Adding more staff
- Purchasing new equipment
- Fare structure changes

Once adjustments have been identified, they should also be implemented and evaluated through the process outlined above—i.e., changes should be evaluated as part of overall program evaluation.

### 3 Outcome

The management and monitoring process allows the PwD subsidy program and the shared ride system as a whole to evolve over time. The cyclical process allows for the collection of data that can be used as an indicator for needed service adjustments. Service adjustments are implemented and monitored in the same fashion to insure that the shared ride service provides customers with an acceptable level of service quality and reliability.