

2008 Pace Blue Ribbon Committee Report

1.0 Message from the Chairman

Chairperson Kwasneski and Pace Board Members,

It has truly been an honor for me to serve as Chairperson of the Blue Ribbon Committee on Paratransit Services. This committee has worked long and hard on the recommendations in this important report. In addition to our work together on various subcommittees, we heard testimony from numerous advocacy organizations representing Paratransit riders. It is interesting to note that the recommendations that resulted from the committee's hard work were similar to the recommendations of the organizations that submitted testimony on Paratransit services. We also had presentations on the law regarding ADA Paratransit services, the Trapeze software that schedules Paratransit rides and the Pace budget.

We divided the work of our committee into three subcommittees: Customer Service, Paratransit Operations and ADA Structure. Each subcommittee's recommendations were prioritized in order of importance.

Important areas that require serious consideration include but are not limited to:

- A review of the current system of zoning
- An ADA Advisory Committee that includes representation of the diversity of the riders that use Paratransit services.
- Disability awareness training of Paratransit carriers, Pace staff and administration.
- A customer-friendly complaint process.
- Independent monitoring system for Pace Paratransit service.

I sincerely appreciate all of the volunteer efforts of each member of the Blue Ribbon Committee to support and serve Paratransit riders. They include:

Rep. Kathy Ryg	Ann Ford	Rocio Perez
Tammy Duckworth	Grace Gallucci	Kathy Reeves
Commissioner, Karen Tamley	Darlene Hale	James Reynolds
Tony Arellano	Pam Heavens	Alva Rodriguez
Kelli Brooks	Leigh Ann Heenan	Sheila Romano
Ray Campbell	Kevin Irvine	Alice Segal
Diane Coleman	Matt Kenah	Janice Stashwick
Mary L. Donner	James Kesteloot	Marcia Trawinski
Eileen Durkin	Tim Knapp	Jim Watkins
Krista Erickson	Lorraine Kopczynski	Tony Zipple
Horacio Esparza	Sharon Lamp	
	Lynn O'Shea	

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1.0 Message from the Chairman

I especially appreciate the three Chairpersons of our subcommittee, Ray Campbell, Kevin Irvine and James Reynolds. I am indebted to Commissioner Karen Tamley for serving as my Vice Chairperson for guidance and counsel when needed. The consultants to our project Michael Zalewski and Jennifer Maley, were invaluable to the Blue Ribbon Committee's important work. Lastly, the efforts of the Pace staff were highly commendable, especially Susan Rushing whom I worked with on almost a daily basis.

Because of the short time frame, the Blue Ribbon Committee was not able to fully address all that we had hoped to do. That unfinished business now becomes the agenda for a new Pace ADA Advisory Committee.

I fully appreciate the confidence that Chairperson Kwasneski placed in me for this important role. I know that this report will be implemented as quickly as possible and shared with the riders of Paratransit services.

Sincerely,

Tony Paulauski

Chairperson

Pace Blue Ribbon Committee

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Blue Ribbon Committee (BRC) Organization

In June 2008, Pace Board Chairman Richard Kwasneski developed a Blue Ribbon Committee (BRC) seeking independent recommendations regarding service issues, governance of Pace's ADA committee, and new methods to improve communication with disabled riders. Members of the committee included consumers, executives and other representatives of advocacy groups, government leaders, and the chairs of the ADA committees for the RTA and the service boards. Tony Paulauski, Executive Director of The Arc of Illinois, served as Chairman of the BRC.

The BRC organized itself into three sub-committees to consider the areas of Customer Service, Operations, and the ADA Structure within Pace. In total, the BRC and its three sub-committees met 24 times to formulate recommendations that would be presented to the Pace Board of Directors on December 3, 2008 for their review and consideration. Noble World Communications assigned consultant, Jennifer Maley, to write the final report and committee recommendations. Pace staff was provided to support the committees in their work by providing data and securing accommodations at the Chicago Metropolitan Area Planning (CMAP) offices for meetings.

The formal charge of the BRC was to make recommendations on ADA Paratransit Service as provided by Pace Suburban Bus and its transition to a region wide system. In order to formulate the recommendations contained in the report, the Pace Board of Directors posed the following questions to initiate a thorough and thoughtful review of Pace's Paratransit service to help the BRC with its work.

- Paratransit service issues
- Governance and structure of Pace's ADA advisory committee
- Customer feedback and communications

The BRC's recommendations, located in sections 2.2 through 2.5, took into account several critical areas including customer service, operations and the ADA structure within Pace. The BRC put forward a total of 28 recommendations. The recommendations represent a consensus of the thoughts and beliefs of a diverse group of individuals which make up the BRC and are listed below in order of priority of each subcommittee.

Customer Service Subcommittee Recommendations

1. We recommend that Pace work closely with its ADA Advisory Committee and others in the disability community to develop a curriculum for provision of disability awareness and cross cultural training to drivers, dispatchers, schedulers, customer service personnel, management (both within Pace and at each carrier) and other Pace staff who are involved in the provision of Paratransit service. We further recommend that individuals with disabilities and disability organizations be engaged to deliver this curriculum once it is developed. Names and contact

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information for those who can provide training must be furnished to the Paratransit carriers. The curriculum must be shared at public meetings with Paratransit riders before being adopted by Pace and there must be opportunities to provide comment. Once adopted, we recommend that this be the standard curriculum Paratransit carriers use to deliver disability awareness and cross cultural training and retraining, and that it be written into Paratransit contracts that this curriculum is delivered to new and veteran Paratransit drivers consistent with regular training and retraining. Going forward, we recommend that any changes to this standard training curriculum be approved by Pace after consultation with its ADA Advisory Committee and opportunities for public comment.

2. We recommend in all instances where Pace communicates with its customers, Pace at a minimum comply with Title II of the ADA. This means that customer communications be provided in accessible formats including but not limited to: large print, Braille, audio and electronic. We recommend that materials delivered in electronic format be prepared in compliance with the Illinois Information Technology Accessibility Act (IITAA) and its implementing standards and guidelines. We further recommend that Pace undertake an analysis of its website to ensure that it is in compliance with IITAA.

We further recommend that Communications be prepared in simple, plain language and that they be made available at a minimum in English and Spanish. We recommend that a clearly defined process be put in place for individuals to request that communications be delivered in other formats, as well as for requesting materials in the formats already listed. The recording space on each carrier's phone line is one means of delivering information to Pace customers. Other means include but are not limited to: presentations to organizations serving people with disabilities, press releases in local mainstream and disability-related media, and information displayed and handed out on Pace vehicles with drivers being required to read such information to those who cannot read it themselves and who request this accommodation. We also recommend that Pace maintain as part of its customer files the preferred format in which to communicate with each Paratransit rider.

3. We recommend that Pace strive to resolve Paratransit customer complaints within 10 business days of their being filed. Multiple means (telephone (voice, relay, TTY), written letter, e-mail) must be advertised to customers for the filing of complaints. We further recommend that Pace inform the customer if a response cannot be delivered within 10 business days of the reason why the response will be delayed. Such information should be provided to the customer within 10 business days of the complaint being filed. Per recommendation 2 above, all written responses from Pace must be provided in the customer's preferred format. We further recommend that responses to complaints include a re-statement of the complaint and specific actions which have been taken to address it within the limits of employee confidentiality.

Finally, we strongly recommend that the entire Pace complaint process be analyzed by an independent third party with recommendations for improvement being made to provide confidence to Paratransit customers that the process is credible and transparent.

4. We strongly recommend that Pace make no changes in Paratransit policy without first consulting with the ADA Advisory Committee regarding each change, and second, presenting these changes to riders in compliance with

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49 CFR Part 37.137, "Public Participation." If, through the public participation process there is significant opposition to any policy change, we recommend that Pace not implement it as proposed.

5. We recommend that Pace re-institute policies allowing for same-day changes and will call reservations on Paratransit and that these policies be implemented system wide. These policies recognize that people with disabilities can run into situations where their plans change for various reasons.
6. We recommend that Pace and its carriers require and enforce, per existing policy, that schedulers ask if there are any special instructions the rider needs to have given to the driver at the time a trip is scheduled with pickup at a location other than a rider's routine origins. We further recommend that special instructions be included in the customer's file for trips originating at routine places such as a home and work address. This will facilitate the easy provision of these instructions to the driver via the manifest or Mobile Data Terminal. That way, drivers have no excuse for leaving riders simply because they did not know extra assistance was needed and expected.
7. We strongly recommend that Pace enforce its policies regarding rider reported emergencies. That is, encouraging riders to call 9-1-1 if they are able to do so in an emergency, and encouraging them to report emergency situations to Pace or carrier staff who will move immediately to get assistance to the scene to evaluate the situation and take appropriate action.
8. We recommend that Pace subcontract with an independent organization to conduct customer satisfaction surveys of Paratransit riders on a semi-annual basis in order to help improve service. Such independent surveys are valuable as they will provide Pace and the Paratransit riding public with confidence that an unbiased evaluation of Paratransit through customer feedback is routinely taking place. To that end, the survey results should be shared semi-annually with the ADA Advisory Committee and at least annually with Paratransit riders through a variety of means including but not limited to public meetings, presentations to organizations serving people with disabilities and dissemination in disability-related media.
9. We recommend that Pace work with Paratransit carriers to insert language into contracts and provide a mechanism for rider feedback which encourages the rewarding of Paratransit drivers, dispatchers and schedulers for providing exemplary service to Paratransit riders. We recommend that Pace reward their staff who provides exemplary service to the riders as well. Such reward programs should be comparable to those for drivers of fixed route service.
10. PRIVATE INFORMATION STAYS PRIVATE. We strongly recommend that Pace have in place stiff punishment, up to and including contract revocation for any carrier who knowingly gives Paratransit riders' private information other than their address to drivers. For example, dispatchers MUST NOT give customers' phone numbers out to drivers so they can call the customer when they arrive at their pickup address. Keeping customer information private also means drivers should not be discussing the customer's disability or trip purpose over public air waves or among each other.

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We recommend that Each of Pace's Paratransit carriers put in place a separate telephone number or menu option to handle ride cancellations, with the handling of a cancellation by a live operator. This will prevent those needing to cancel a trip from having to call into the regular number used to schedule rides and wait on hold. However, if a rider does call into the regular number to cancel a ride, the cancellation should be taken and logged in by the call taker. The cancellation shall be taken and logged, no questions asked about the reasons for canceling.

11. We recommend that Pace work with its ADA Advisory Committee to develop an incentive program to reduce no-shows and late cancellations by Paratransit riders. As the 2005 National Council on Disability Report on transportation shows such programs have been shown to reduce no-show and late cancellation rates in Paratransit systems where implemented.

Paratransit Operations Subcommittee Recommendations

1. RTA, in close collaboration with Paratransit users and the Pace ADA Advisory Committee, should reevaluate the Pace Paratransit zoning system and its reconstruction and /or deconstruction of the same, within a reasonable time period after the presentation of these recommendations to the Pace BOD. (Reasonable time suggestion is by the end of March 2009 to the extent feasible.)
2. Pace should work with its customers and the ADA Advisory Committee to establish a system to evaluate its Paratransit vehicles region wide to assess issues of vehicle configuration and features. Vehicle configuration and features include, but are not limited to issues of safety, ease of use, accessibility for a wide range of mobility devices of various sizes, ambulatory users, space constraints, suspension systems, securement/seat belts, seat height, clear floor space, customer comfort, color, markings, identification of carriers, fuel efficiency and compliance with all applicable laws.
3. RTA in close cooperation with customers and the ADA Advisory Committee should create an independent monitoring system for Pace Paratransit service. The system would monitor the customer experience from the first point of contact to trip completion on an ongoing basis. Components of this system should include randomly selected Paratransit secret shoppers, focus groups and other forms of input from users.

Quarterly monitoring reports will be made public and readily available and accessible to all. The system will include regular and ongoing interaction with customers.

4. Pace should implement a region wide centralized scheduling system that would allow customers to call one toll-free # region wide to arrange all trips. Until which time a centralized scheduling system is in place, we recommend that one toll-free # be established for reservations region wide.

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5. Pace should have a conflict mediator available through a toll-free number during all hours of operation to immediately address conflicts as they occur between Paratransit personnel and passengers/riders with a goal of increasing safety and preventing escalation of conflict.

ADA Structure Within Pace Subcommittee Recommendations

1. We recommend the formation of two new ADA Advisory Committees, one serving the City of Chicago and another serving Suburban Cook County and the five collar counties. We recommend that the two committees interface with one another regularly, via regular communication between the leaders of the two groups and/or convening both groups together periodically to share ideas and shared experiences, such as those of riders that use both city and suburban Paratransit service.
2. Each of the two committees would be comprised of 15 members. Despite concerns about the size of these groups, we feel this presents the best opportunity for diversity and a wide range of ideas and experiences.
3. Committee members would serve staggered terms. Although the duration of terms has not been decided upon, we support the notion that no more than roughly half of the committee should see its term end on the committee at any one time. We feel it's important to bring in new people and new ideas regularly, but to also maintain a core of members that have been working on various discussions or initiatives in order to ensure progress isn't halted because of turnover among group members.
4. Both committees should strive for diversity. This includes, but is not limited to, varying income levels, neighborhoods, ages, races, and types of disabilities.
5. The committees should remain consumer-driven and comprised of riders.
6. The subcommittee recommends that two set locations be devised as meeting places. Meetings would rotate between the two locations in order to preserve equity between those living north and those living south.
7. The initial five members of each committee would be selected by the Pace Board Chairman, and those five would then be tasked with selecting the remaining 10. The five initial members would be free to solicit the input and recommendations of any outside group or individual they choose.
8. We recognize the accomplishments and duration of service of the existing Pace ADA Advisory Committee and appreciate their efforts. Our subcommittee concluded that while the co-chairs on the existing Pace ADA Advisory Committee are encouraged to seek placement on the new committees, we are recommending that the current co-chairs are barred from serving in a leadership role on the new committees for two years. We hope to encourage new voices via new leadership to discuss the issues affecting Paratransit service.

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9. We recommend that the chairs of the two Pace ADA Advisory Committees provide a report to the Pace Board of Directors at a Pace Board meeting on a quarterly basis. The report should indicate current activities and discussions, an overview of recent meetings, and other topics of interest. Their report should be presented to and received the approval of committee members prior to presentation to the Pace Board.
10. The new Pace ADA Advisory Committees should develop their own by-laws. It had been recommended that the new committees could begin their work operating under the by-laws of the existing Pace ADA Advisory Committee, and then amend them over time as needed. Although we suggest that the new committees request copies of the by-laws of the existing committee and those of other ADA advisory committees for review and as a potential model, the new committees should develop their own by-laws under which they are comfortable operating and that meet their goals and ideals.
11. Our committee spent all of its time developing these recommendations concerning the development of the new ADA Advisory Committees. As such, we did not reach a conclusion on the issue of current ADA enforcement practices such as appeals or mediation. We believe that this important issue should be assigned to the new committees for their review and recommendations.

Pace Operations

The greatest question to be answered is how can Pace improve its operations and maximize its effectiveness in a fiscally responsible manner. In the past, Pace has been recognized for its service to the Suburban Paratransit rider. In 2005, as the Chicago Transit Authority (CTA) struggled to maintain services to the Paratransit community, CTA found itself in a budget shortfall. CTA was facing a budget crisis throughout its entire fixed-route service system and was in jeopardy of massive cuts across the board. Budget concerns and the future of mass transit for the city of Chicago was brought to the Illinois General Assembly, which voted to remove Paratransit service from the CTA and turn it over to the management of Pace.

Discussion surrounding the quality of service provided to Paratransit users was highlighted during the BRC evaluation. Recommendations have been made to improve the quality of service in the areas of Operations, Customer Service and the Structure of the ADA within Pace.

A conversion from a manual system to one that is automated takes a minimum of six months to become effectively operational and up to one year to work through many operating details that may not have been addressed in the initial roll-out. The previous statement is not meant to overshadow or distract from the needs and concerns as voiced by Paratransit users. The recommendations put-forward by the BRC represent valid concerns of the Paratransit user and deserve to be reviewed for future Pace operating procedures.

Pace has operated suburban fixed-route and suburban Paratransit services since 1982. Pace operates the largest demand-response public transit service in the world. In order for Pace to succeed, it will need to address significant challenges of the present and the future and make changes to its operating structure to meet those

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demands. Change on any level is difficult. When individuals are directly impacted by the outcome emotion becomes part of the decision making process. Our nation's thirty-fifth President, John F. Kennedy, once said, "Change is the law of life. And those who look only to the past or present are certain to miss the future." It is the directors to ensure that both Paratransit users and the taxpayers, who fund a significant portion of Paratransit services, have confidence that Pace is responsibly serving the needs of all.

The following set of principles looks at where Pace is today and what it needs to consider:

1. Better communication.
2. Improved customer service.
3. Ongoing training for Paratransit staff and riders.
4. Continued development of infrastructure to increase access, mobility and sustainability.
5. Working to improve operations.
6. Understanding the role of Pace within the disabled community.
7. Auditing Pace website for accessibility.

A presentation by Zalewski on the Federal requirements as documented in the Code of Federal Regulations, Title 49. Transportation, Part 37. Transportation Services for Individuals with Disabilities (ADA) was provided for informational purposes to the BRC and a summary of those requirements can be found in section 3.0 through 3.1.

Based upon multiple discussions, including the Pace Operations Sub-Committee on August 27, 2008 regarding Pace policy, monitoring, emergency response systems, training and retraining, public hearings, and scheduling, Maley requested further documentation from Pace. The documents that were provided in response to Maley's request can be found in section 5.0 through 5.7.

Conclusion

The most prominent results were problems with zoning and the need for better communications and training. It will be upon Pace to implement the recommendations as set forth. Some may require structural reorganization that could fundamentally be fixed by changing or altering current procedures. Other recommendations should be prioritized first by need and second by funding. It should be noted that changes to Pace operations may not be immediate. As with any re-structuring process, change will take time. However, Pace should take action on set-forth recommendations in a timely manner looking at priorities as spelled out by the BRC. The recommendations should be reviewed for qualitative and quantitative improvements. An understanding of the fiscal responsibility, imposed upon Pace by the Illinois State Legislature, for receipt of state funding as approved by the RTA, should be attached to any call for action.

Open lines of communication would relieve the feeling shared by riders that Pace is not forthcoming in its actions. A communications audit to review all collateral materials, written correspondence, and any other method of communicating with Paratransit users should be conducted to assess consistency in messaging and

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methods of distribution. Ongoing communication on the state of the budget, lobbying efforts and the future goals of Paratransit service will improve transparency and build trust.

The leaders of Pace must press to understand what has changed, what can change and what new opportunities are presenting themselves that can benefit both the rider and Pace.

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1.2 Evolution of Pace

Pace has operated ADA service in the suburbs since 1982 and in the Chicago service area since July 1, 2006. Pace has been working to transition the ADA Paratransit service delivery system to a region wide service that includes Chicago and the six collar counties since its inception.

It is the duty of Pace to provide a demand responsive, origin to destination, Paratransit service, in compliance with FTA and ADA regulations, throughout the RTA's six county region.

On March 28, 2008 Pace transitioned the City of Chicago to a new service model, which included new technology built on the Trapeze software scheduling system.

The new service model includes five carriers in the Chicagoland area, up from three carriers under the old system. One carrier is assigned to each geographically determined service area. Two additional carriers were contracted to handle subscription and certification trips. The new service model was structured to provide customers with service from carriers centrally located in accordance with their origination location. Prior to March 28, 2008, riders could call any of the three carriers to schedule a trip without regard for the proximity between carrier base location and the origination of the rider.

Riders developed a preference for certain carriers. CDT became the carrier of choice for many users. When carrier phone lines opened at 6:00a.m., phone capacity constraints resulted in people having to call two, three or four times to get through to schedule a trip. By 10 a.m. availability of carriers would fall and callers would then be forced, in a round-robin fashion, to call alternate carriers until they could find an opening.

Pace divided the city of Chicago into three zones. Riders were required to call the service carrier in the zone of their origination. By dividing the city into three zones, Pace hoped to reduce call surges, evenly disperse call flow, and reduce on-hold times. Trips are still required to be scheduled for the next day between the hours of 6:00a.m. and 8:00p.m. Newly added was a voice logging system that records all calls for quality assessment and training purposes.

The Trapeze software system used by Pace in the suburbs was implemented in the city on March 28, 2008. The Trapeze system records pick-up and drop-off times, which are electronically time stamped when drivers enter information into the data terminals installed in all vehicles. AVL technology, much like the well known GPS tracking device, provides real-time information on the vehicles' location and also guards against false recording. If a driver enters an incorrect arrival time it is flagged in the computer tracking system as incorrect. Carriers are able to view and locate vehicles in real-time anywhere.

According to a presentation by Deputy Executive Director of Pace Revenue Services, Melinda Metzger, on June 27, 2008 the new contracts, with the following guidelines were implemented on March 28, 2008, however, not everything was in place then.

- Pace's vehicle fleet was increased gradually from 440 when Pace took over the service from CTA in July of 2006 to 660 with the advent of new service contracts in March of 2008.

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1.2 Evolution of Pace

Under the new service contract on March of 2008:

- 50% of the vehicle fleet is new
- 25% of the vehicles are scheduled to be replaced on an annual basis.
- DriveCam cameras are mounted in vehicles to record erratic driving for safety and security.

According to Pace's records, on-time performance from May 1, 2008, through June 25, 2008 is 90%. In 2007 it was 87%. The average number of trips per weekday is 6,100 trips. This is an increase of 300 trips per weekday over previous levels. See appendix iii for details.

Based on public feedback, Pace expanded the Chicago service area (See section 5.6 for a list of Public Hearings Prior to Policy Changes.) Service on the south side has been expanded from approximately the City border down to Sibley (147th Street). On the southwest side service is extended along 1st Avenue to include service to Lyons, Summit and Burbank. Service on the northwest side has been expanded into additional western areas in Skokie and Morton Grove. High traffic areas include River Oaks Shopping Center, Chicago Ridge Mall, Brookfield Zoo, Golf Mills Shopping Center and Lutheran General Hospital.

Suburban-to-suburban trips still require riders to book with a suburban carrier. It is not anticipated that this will change until Pace implements its regional dispatch system.

Pace has stated that the designation of zones is the first step to implementing a regional ADA service and a centralized dispatch system that services the entire transit region. Pace has stated that the transition has resulted in improved on-time performance for riders.

The transition to the Trapeze computerized scheduling and dispatching system was meant to increase efficiency, reduce costs, add accountability and oversight of service quality, and increase service productivity.

The Federal requirements for service providers are as follows:

- Service area – Service must be provided within $\frac{3}{4}$ of fixed route service.
- Response time – Service must be taken at least one day in advance of the requested service date.
- Fares – The ADA fare must be comparable to the regular fixed route fare. Specifically, the ADA fare cannot be more than twice the regular fixed route fare.
- Trip purpose restrictions – There can be no restrictions or priorities based on trip purpose.
- Hours and days of service – Service must be available during the same hours and on the same day that fixed route service is available.
- As defined by the ADA, there can be no capacity constraints in terms of trip denial, patterns of late pick-ups and/or excessively long trips. Trip length as defined by the ADA must be comparable to fixed-route travel times.