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Executive Summary

FACT updates its Business Plan annually to maintain the plan as a current reference, and to comply with the requirement of the CTSA contract with SANDAG. This is the fifth update to the original Business Plan adopted in 2009, which provided a comprehensive review of FACT’s purpose, the business environment, the community and stakeholders.

This plan addresses the current status of all the service and collaborative proposals. It prioritizes projects by readiness with respect to funding as well as other practical considerations, including readiness of partnering agencies to engage in the projects. Projects are classified as “short term” or “long term” priorities or “potential new programs currently unfunded”. This Plan Update also reviews all FACT revenues and funding sources as well as makes recommendations for changes to the way FACT is funded in order to provide more sustainability in the future. The transportation needs described in the plan were derived from the San Diego Association of Governments (SANDAG) 2014-2018 Coordinated Plan, which analyzes transportation needs through surveys, data, and stakeholder input.

Significant updates in the proposed 2016-2021 Business Plan Update include:

**FACT Services:**
- Section 3.4 FACT Transportation Brokerage
- Section 3.7 Compliance Program & Title VI Plan

**Contracted Services:**
- Section 3.8 Poway Adult Day Health Care Center Transportation
- Section 3.9 Oceanside Senior Transportation Van Service
- Section 3.10 Foster Youth Student Transportation (SDCOE)
- Section 3.11 LIFT Paratransit Service (NCTD/First Transit)
- Section 3.12 ElderHelp (Seniors-A-Go-Go)

**Coordinated Transportation Services:**
- Section 3.13 Donating Paratransit Vehicles to Local Non-Profits
- Section 3.14 Leasing FACT-owned Vehicles to Service Providers
- Section 3.15 Purchase of 5310 Vehicles.

**Projects Implemented - during FY 2014-15:**
- Section 3.3 FACT and 2-1-1 Resource Database Integration
- Section 4.1.9 Veterans’ mobility initiatives – coordination with SANDAG and 2-1-1

**Proposed Short Term Services (1-2 Years)**
- Section 4.1.2 Trip Management Software Procurement
- Section 4.1.8 MTS Access Paratransit Service

**Proposed Long Term Services (3-5 years)**
- Section 4.2.1 Medical/Dialysis Transportation Coordination
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- Section 5.2.1 Agency Contracts
- Section 5.2.4 Small Grant Programs and Awards

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Chapter 1: FACT – An Overview

1.1 Background

Full Access & Coordinated Transportation, Inc. (FACT) was formed in 2005 due to the efforts of community advocates who believed that many San Diego residents did not have access to affordable transportation. The agency’s goal was to develop a coordinated transportation system for San Diego County to fill gaps in transportation services. FACT was incorporated as a non-profit public benefit corporation in 2006, and designated the Consolidated Transportation Services Agency (CTSA) for San Diego County by SANDAG. SANDAG selected FACT through a competitive procurement process.

FACT’s CTSA contract with SANDAG is renewed annually for an unspecified term (CTSA Work Plan, Appendix 1). The CTSA status enables FACT to claim State TDA 4.5 funds and gives FACT the potential to be a direct grantee of the United States Department of Transportation (USDOT). The CTSA’s are mandated by California State law to coordinate and consolidate human services transportation.

CTSA activities include mobility management and coordination, free information referrals, and transportation services. The brokerage helps FACT provide cost effective transportation services. The CTSA mandate includes services for low income individuals, youth, veterans, as well as other transportation disadvantaged populations, including persons with disabilities and seniors.

FACT provides transportation in communities where other local and regional services are not available or unable to accommodate a person’s mobility needs.

In 2012, FACT updated its business name to Facilitating Access to Coordinated Transportation after filing a DBA (Doing Business As) Application.

In 2013, FACT updated its mission with respect to the definition the program’s intended recipients to better align with its core values and objectives.

1.2 Mission & Vision

FACT’s Mission is to assist San Diego County residents with barriers to mobility to achieve independence through coordination of transportation services.
FACT does the following:

1. Coordinate transportation resources and services
2. Act as mobility manager for San Diego County
3. Advocate on behalf of the transportation disadvantaged
4. Educate stakeholders about transportation needs
5. Identify and secure funding for services
6. Operate transportation efficiently & under agency contracts
7. Manage transportation brokerage

**FACT’s Mission is to assist San Diego County residents with barriers to mobility to achieve independence through coordination of transportation services.**

1.3 Highlights

![Year-by-Year Overview of FACT Services](image)

1.4 Governance

FACT is governed by a Board that seats up to eleven (11) regular positions as well as two (2) ex-officio positions. Currently the Board has 7 members; new members are appointed by the Board with the exception of one member who is a representative from the Transportation Committee – an advisory committee of the SANDAG Board of Directors.

The FACT Board has appointed 2 advisory committees - the Council on Access and Mobility (CAM) and the Technical Advisory Committee (TAC). The Board also appoints FACT Executive Director, who administers the agency. The Executive Director, TAC, and CAM report to the Board.
BOARD OF DIRECTORS
Hon. Dave Roberts Chair
Bob Campbell Vice Chair
LaVonna Connelly Secretary
Susan Hafner Treasurer
Hon. John Aguilera
Hon. George Gastil
Phil Monroe
Norine Sigafoose

TAC
Technical Advisory Committee
5 members

Executive Director
Arun Prem

CAM
Council on Access and Mobility
30 members

Grants Management Analyst
Oswaldo Perez

Service Development Manager
Meagan Schmidt

Mobility Coordinator
Leticia Corona

Mobility Coordinator
Noah Minner

Mobility Coordinator
Dorothy Harris

Mobility Coordinator
Jonathan Albarran

Office Manager
Budd Anderson
1.4.1 Board of Directors:

- Honorable Dave Roberts — Board Chair — County Board of Supervisors, District 3
- Bob Campbell — Board Vice Chair — former Councilmember, City of Vista
- Susan Hafner — Board Treasurer — Principal, Multimodal Solutions
- LaVonna Connelly — Board Secretary — Ramona Transportation Action Committee
- Honorable John Aguilera — Councilmember, City of Vista
- Phil Monroe — former Councilmember, City of Coronado
- Honorable George Gastil — Councilmember, City of Lemon Grove

The FACT Board meets primarily on the fourth Thursdays of each month at Encinitas City Hall at 9:00 a.m.

1.4.2 Technical Advisory Committee (TAC):

TAC participates in Board meetings and meets with staff to review programs and projects.

1. Janelle Carey, MTS
2. Kim Thorp, NCTD
3. Lois Knowlton, Friends of Adult Day Health Care Centers
4. Danielle Kochman, SANDAG
5. VACANT

1.4.3 Council on Access and Mobility (CAM)

CAM has 30 seats, 25 of which are currently occupied. Members include service providers, planning agencies, consultants, and community members. CAM represents a cross section of transportation interests in San Diego County. CAM meets every other month, alternately in North County and in the City of San Diego. CAM’s Mission is to “Promote coordination of transportation resources and services in San Diego County.”

CAM Membership Structure:

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>SEATS</th>
</tr>
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<tbody>
<tr>
<td>Regional Agencies/Public Transportation Providers</td>
<td>5</td>
</tr>
<tr>
<td>Specialized Transportation Providers</td>
<td>8</td>
</tr>
<tr>
<td>Private Sector Service Providers/Consultants</td>
<td>8</td>
</tr>
<tr>
<td>Faith Based Transportation Providers</td>
<td>2</td>
</tr>
<tr>
<td>Hospitals/Medical Transportation Providers</td>
<td>2</td>
</tr>
<tr>
<td>Tribal Agency</td>
<td>1</td>
</tr>
<tr>
<td>Rural Transportation Representative</td>
<td>1</td>
</tr>
<tr>
<td>Open Seats</td>
<td>3</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>30</strong></td>
</tr>
</tbody>
</table>
1.4.4 Staff
FACT is managed by an Executive Director who is responsible for managing FACT’s programs, developing partnerships with other agencies, and overseeing staffing and planning meetings of the FACT Board. The Executive Director supports 5.6 full time equivalent staff at this time, including a Service Development Manager, two full time and a part time Mobility Coordinator, a full time Grants Analyst, and an Administrative Assistant.

Chapter 2: Specialized Transportation Needs

2.1 Regional Transportation Needs
The 2012-2016 Coordinated Plan developed by SANDAG identified unmet transportation needs for urban, suburban and rural areas of San Diego County. The plan evaluated existing transportation services, public, private and social service providers, and prioritized strategies to provide transportation to sensitive population groups including individuals with disabilities, persons with limited means, veterans and military families, and seniors. The following is a summary of the transportation needs.¹

- **Individuals with Disabilities** — There are approximately 300,000 persons with disabilities in San Diego County according to the Census 2010. For persons with disabilities, Medical, Religious, School, Recreation/Leisure and Other trips totaled un-served trip percentages over 30 percent. The data reflects that transportation for persons with disabilities is most lacking for medical and quality of life trips.

- **Person with Limited Means** — The Coordinated Plan states that there are approximately 170,000 persons living below the 150 percent poverty threshold who presumably need transportation to and from various destinations. SANDAG has identified densely populated areas where low income individuals live and work. The data analysis revealed that a quarter of the work related trip needs were un-served. Medical and recreation/leisure trips were the most underserved.

- **Seniors** — the aging population in San Diego County is projected to increase 125 percent by year 2030. Transportation to and from medical services (non-emergency) is one of the most important needs among seniors.

- **Veterans and Military Families** - San Diego County is home to over 228,000 veterans. While a significant number of older veterans already reside in San Diego, an influx of newly discharged service members is projected to further add to the population. With the expected increase in post-war service individuals, an inevitable rise in assistive services (especially medical-related) will need to be planned in the future.

2.2 Existing Transportation Services
San Diego County has public transportation services that are operated by Metropolitan Transit System (MTS) and North County Transit District (NCTD). MTS serves Central, Eastern, and Southern areas of the county, and NCTD serves North and Northeastern parts of the county. The two agencies together provide fixed-route services, ADA Paratransit, light rail, and two commuter rail services, the Coaster and Sprinter. Private and social service transportation providers also serve seniors, individuals with disabilities and persons with

¹ 2014-2018 Coordinated Plan, Chapter 4 “An Assessment of Specialized Transportation and Public Transit Needs”, and Chapter 7 “Priorities for Project Funding”
limited means through various programs, including volunteer driver programs, the traditional directly operated van services as well as subsidized taxi services. Maps of specialized transportation providers funded by the FTA Section 5310 and TransNet Senior Mini-Grant programs can be found in Appendix 2. For a comprehensive list of these programs please refer to FACT’s database of approximately 150 transportation programs at www.factsd.org. A short list of programs is shown in Appendix 3.

2.3 Regional Transportation “Gaps”

The Coordinated Plan outlines regional transit “gaps” for individuals with disabilities, persons with limited means and seniors. These gaps represent geographic areas lacking public, private and social service transit. Some of the gaps represent the following cities/regions:

- Carlsbad
- Carmel Valley
- City Heights
- City of San Diego
- Coronado
- Encinitas
- El Cajon
- Escondido
- Fallbrook
- Grossmont
- Hidden Meadows
- Imperial Beach
- Lakeside
- Lemon Grove
- Mira Mesa
- National City
- North Park
- Northeast Oceanside
- Oceanside
- Ocean Hills
- Mira Mesa
- National City
- North Park
- Northeast Oceanside
- Oceanside
- Ocean Hills
- Poway
- Rancho Bernardo
- San Marcos
- Scripps Ranch
- South Carlsbad
- Spring Valley
- San Ysidro
- Tierrasanta
- Vista

These gap areas have significant impacts on sensitive populations who are often dependent on transit for regional services. The Coordinated Plan states that medical, employment related, religious and other destinations are the most underserved for these sensitive populations. An overriding need in San Diego County is for regional and intercity transportation options, particularly for seniors and other transportation disadvantaged groups. Many of FACT’s services are aimed at filling this gap since it was identified as a Coordinated Plan priority that is not addressed by any other agencies. For a complete list of the gap areas please refer to Appendix M of the Coordinated Plan.

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2Appendix M — Regional Transit and Social Service Transportation Gaps, Coordinated Plan, p. M-1—M-18
2.4 Meeting Regional Needs

FACT’s priority is to coordinate with existing transportation services to serve areas that represent gaps in current services. FACT operates as mobility manager by identifying the needs of callers and referring them to an existing, appropriate service. FACT maintains a database of transportation resources which can be accessed directly via www.factsd.org or via telephone by calling staff. Staff corroborates the caller’s data to define the transportation gaps.

Chapter 3: FACT Services – Current

3.1 Transportation Provider Database and Website Referrals

FACT maintains a database (www.factsd.org) of public, private and social service transportation programs throughout the County. The database and web based referral system (formerly known as STRIDE) was established by SANDAG in 2001 through New Freedom funds and is supported by numerous transportation providers. It was transferred to FACT along with the CTSA designation in 2006. FACT offers free online referrals with comprehensive information about specialized transportation providers. The database includes approximately 137 transportation services; these services include public, private, social service and volunteer driver transportation programs (for a short list of providers in the database, see Appendix 3).

The database allows riders to search programs that meet their criteria, for example programs that service seniors or low income individuals, or certain zip codes. The FACT website also features an online trip planner that suggests programs based on the riders’ trip origin and destination and specific needs (wheel chair accessible, ambulatory, non-ambulatory, etc). In 2014, the FACT website generated an average of 1,470 web hits per month.

3.2 Telephone Referrals

FACT’s Mobility Coordinator provides toll free telephone referrals that match the appropriate transportation service with the unique needs of the customer. In 2014, FACT provided an average of 148 monthly referrals to other existing transportation services for clients in San Diego County.

3.3 FACT and 2-1-1 Resource Database Integration

In 2014, FACT provided transportation resource data to 2-1-1 San Diego to be combined into a consolidated database. FACT and 2-1-1 also conducted outreach to providers to update and expand countywide transportation resources. This updated inventory of transportation is funded through Veterans Transportation Community Living Initiative (VTCLI) funds.

3.4 FACT Transportation Brokerage

In 2012, FACT established a pool of transportation vendors to procure trips competitively. These vendors comprise the Brokerage, which includes for-profit, non-profit and social services transportation providers. The brokerage model promotes sustainable and cost-effective transportation in San Diego County.
FACT’s Board of Directors appointed the Software & Service Development Committee to collaborate with FACT staff on policies and service planning for the RideFACT service. Committee members included Board Members as well as CAM membership. It has played a strategic role in the development and implementation of the RideFACT program.

FIGURE 3-1 RIDEFACT SERVICE MODEL

This service model is funded by Senior Mini Grant, New Freedom, and TDA 4.5 funds. Service operates Monday through Friday between 7 a.m. and 8 p.m. Reservations are accepted through the FACT Call Center on a first come first served basis from 9 a.m. – 4 p.m., Monday – Friday, up to 7 days before the trip.

RideFACT provided approximately 20,206 trips in 2014. The average cost per trip in 2014 was $19.49/trip, a 7% increase in average cost from 2013. The increased cost is largely due to the increased demand for wheelchair accessible trips, which are typically more expensive in dial-a-ride/demand-response services. However, FACT is still providing trips at a cost much lower than the national average cost ($29.30) for a paratransit trip (ADA Paratransit Services, GAO-13-17, 15 November 2012). The average trip length was 12 miles. The average cost per mile in 2014 was $1.62.

FIGURE 3-2 RIDEFACT STATISTICS (2014)

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>One way Trips in 2014</td>
<td>20,206</td>
</tr>
<tr>
<td>AVERAGE Cost of one-way trip in 2014</td>
<td>$19.49</td>
</tr>
<tr>
<td>AVERAGE Cost per Mile in 2014</td>
<td>$1.62</td>
</tr>
<tr>
<td>% of Trips for Seniors in 2014</td>
<td>93%</td>
</tr>
<tr>
<td>% of Trips for Medical purposes in 2014</td>
<td>60%</td>
</tr>
</tbody>
</table>
FIGURE 3-3 MONTHLY RIDEFACT TRIPS (JULY 2012 – JANUARY 2015)

3.5 Countywide Implementation of RideFACT Pilot

In January 2012, FACT implemented a pilot senior transportation service called RideFACT. It provided general purpose trips to seniors (60+) in Escondido, Rancho Bernardo, and Poway areas. In June 2012, RideFACT expanded to all cities in San Diego County as well as Ramona, Country Estates, and Spring Valley (FACT Service Area map - Appendix 4).

RideFACT and FACT contracted services have provided over 45,000 one-way trips to-date.
RideFACT is a subsidized, demand response curb-to-curb transportation service. It is offered to seniors when FACT is unable to find them other suitable transportation. FACT procures RideFACT trips through a brokerage.

3.6 Safety Program

FACT hired a consultant to conduct on-site inspection of FACT’s brokerage vehicles as well as driver and vehicle records. The consultant developed a comprehensive safety and maintenance program, identifying any findings and developing recommendations on the safety and maintenance of the vehicles operating FACT trips. A report was issued in April 2013. It identified all the deficiencies in the brokerage vehicles that were observed during field inspections. FACT staff worked with brokerage vendors to rectify all reported issues.

3.7 Compliance Program & Title VI Plan

FACT’s comprehensive compliance program and Title VI plan includes the following elements:
- Title VI Notice to the Public
- Title VI Complaint Procedures
- List of Title VI investigations, complaints, and lawsuits
- Public Participation Plan, including information about outreach methods to engage minority and limited English proficient populations (LEP), and summary of outreach efforts
- Language Assistance Plan for Limited English Proficient (LEP) persons with a four-factor analysis

The final Compliance Program and Title VI Plan (Appendix 5) was adopted by the FACT Board of Directors on May 29, 2014 and approved by Caltrans on June 9, 2014. Per federal requirements, the Plan will be updated and submitted every three years, next due in May 2017.

3.8 Poway Adult Day Health Care Center Transportation

In January 2013, FACT and Poway Adult Day HealthCare Center (PADHCC) entered into an agreement to provide recurring trips to a small group of riders attending PADHCC. This service began as a pilot project in order to assess FACT’s ability to group trips effectively, as well as assess the contractor’s ability to handle the requirements of grouped rides. With the brokerage implementation proving to be a success, PADHCC has opted to rely on FACT for their future transportation needs. PADHCC pays an administrative fee to FACT to provide the resources needed to accommodate PADHCC trips. The PADHCC transportation service accounts for an estimated 400 trips per month.

3.9 Oceanside Senior Transportation Van Service

In September 2013, FACT was awarded a contract by the City of Oceanside for senior on-demand transportation services, under the Oceanside Solutions for Seniors on the Go program. Seniors who are eligible to ride the Van Service are preapproved by City of Oceanside staff through a registration process. The program requires a 3-7 day advance reservation, verification of client eligibility, and providing call center support as well as transportation through the brokerage. There are roughly 1,000 seniors approved to ride the service at this time. The service area includes Oceanside as well as medical centers in the neighboring cities of Encinitas, Carlsbad, San Marcos and Vista. Approximately 6-8 one-way trips are delivered daily through this service.
3.10 Foster Youth Student Transportation
In December 2013, FACT was awarded a contract for foster youth transportation by the San Diego County Office of Education. The purpose of the transportation program is to provide safe, reliable, professional transportation for foster youth students to and from their school of origin. FACT is currently using two (2) of the brokerage vendors to provide the transportation.

3.11 LIFT Paratransit Service (NCTD/First Transit)
In March 2014, FACT entered into an agreement with First Transit to provide trips for NCTD’s LIFT program. LIFT is a specialized paratransit service required as per Americans with Disabilities Act (ADA) for persons with disabilities, for travel within the service area covered by NCTD’s bus and rail services. Under this agreement, FACT would provide curb to curb transportation for NCTD clients as a subcontractor to First Transit, the contractor for LIFT service. The term of the service agreement is unspecified and may continue through the end of the contract between First Transit and NCTD, which has a 3.5 year term. Demand for LIFT services goes through several peaks and valleys throughout the year. During peak demand, FACT would dispatch 40-50 LIFT trips on average per day.

3.12 ElderHelp (Seniors-A-Go-Go)
In March 2015, FACT began administering service to assist ElderHelp clients in its Seniors-A-Go-Go program. Elderhelp is seeking approximately 20 one way trips per week to supplement the transportation they already provide. The trips are in the south San Diego County, including City of San Diego. FACT would provide individual rides from clients’ homes to their destinations and back. Occasional grouped rides may also be accommodated by FACT.

3.13 Coordinated Outreach
FACT administers the Council on Access and Mobility (CAM), an advisory committee to the FACT Board that meets bi-monthly to discuss transportation and coordination issues. FACT also works with other transportation groups, including the San Diego County Volunteer Driver Coalition, Ramona Transportation Action Committee (RTAC), and is a member of SANDAG’s Social Service Transportation Advisory Council (SSTAC and the Alliance for Regional Solutions (ARS).

Since 2013, FACT has been a partner organization in the County of San Diego’s Live Well Program. The Live Well San Diego initiative is a long-term plan to advance the health, safety, and overall well-being of the region. It is built with community involvement in three parts: (1) Building Better Health; (2) Living Safely; and (3) Thriving. The four major strategies of the Live Well initiative are to build a better service delivery system, support positive choices, pursue policy and environmental changes, and improve the culture within. Through this partnership, FACT collaborates and shares information with the County of San Diego in support of the Live Well program.
A video highlighting FACT services and data pertaining to FACT services will be presented to stakeholder and decision-making groups across the region including NCTD, MTS, SANDAG Transportation Committee, and city councils, among others as recommended by the FACT Board.

3.14 Donating Paratransit Vehicles to Local Non-Profits

In April 2015, MTS and FACT collaborated to donate 10 retired vehicles from the MTS Access fleet to local non-profits. A review committee assisted with the selection of recipients. Four local non-profits received donated vehicles: BEZSAM Inc./Coordinated Fleet Services, Renewing Life, New Vision Christian Fellowship, and Passion 4 K.I.D.S.

3.15 Leasing FACT-owned Vehicles to Service Providers

In December 2014, FACT leased ten (10) vehicles purchased with Federal Transit Administration (FTA) Section 5310 Program funds. The vehicles provide transportation to elderly persons and persons with disabilities in areas where public mass transportation services are otherwise unavailable, insufficient, or inappropriate. Four (4) minivans and two (2) small buses were leased to City Link Foundation (4), three (3) minivans were leased to AAA Transport Inc., and one (1) minivan was leased to Renewing Life. The vehicles provide roughly 25 passenger trips/day.

FACT’s solicitation/outreach process for selecting recipients of leased vehicles was adopted by the Board in September 2014. FACT also participates in a pool of agencies, comprised of current 5310 recipients, which are notified when underutilized vehicles become available in San Diego County. FACT will continue to solicit interest from local vendors to lease vehicles as they become available.

3.16 New Vehicles

In February 2015, FACT was awarded twelve (12) new minivans, which it applied for during the Section 5310 grant program cycle in 2013. The minivans will seat up to 5 ambulatory passengers/2 wheelchair passengers. In June 2015, FACT will issue a RFEI and, if sufficient interest is generated, a RFP per the outreach/method of solicitation policy approved by the Board.

Chapter 4: FACT Services – Proposed

4.1 Proposed Short Term Services (1-2 Years)

4.1.1 FACT Brokerage

In December 2011, the FACT Board approved the implementation of an in-house transportation brokerage model. Since then, the brokerage has expanded with providers covering the 18 incorporated cities and several unincorporated communities. It was the foundation for the success of the RideFACT program and the contracted services. The brokerage currently has 10 members.

4.1.2 Trip Management Software Procurement

In spring 2015, FACT, as part of an RFQ for its joint Veterans Transportation Community Living Initiative (VTCLI) project with 2-1-1 San Diego, issued a Purchase Order for brokerage software to assist staff with
trip reservations and dispatching trips. The software will allow FACT to share trip requests with service providers, dispatch trips, negotiate trip costs, and report data on trips.

The VTCLI RFQ also contains purchase orders for a Customer Relationship Management module as well as interactive kiosks. These technologies will be shared between FACT and 2-1-1 San Diego, and will provide comprehensive tools for mobility managers to provide referrals and schedule trips.

4.1.3 Expansion of FACT Services to Nonurban Areas

In January 2012, the RideFACT service began providing trips to seniors in Escondido, Rancho Bernardo, and Poway. In June 2012, RideFACT was expanded to all cities in San Diego County and Ramona, the Country Estates, and Spring Valley. FACT services will be further expanded to include Fallbrook, Bonsall, Camp Pendleton, and Lakeside, as well as the nonurban (rural) areas of Valley Center, Rainbow, Alpine, and Jamul. Appendix 4 shows the FACT existing and proposed expanded service areas.

4.1.4 What’s in a name? MedRIDE & MedAccessRIDE now RideFACT

MedRIDE is a TransNet (Senior Mini Grant) and New Freedom grant funded project which was approved in February 2011 for a two year period. MedRIDE was implemented as RideFACT in 2013.

MedAccessRIDE is funded primarily by a New Freedom and Transnet (Senior Mini Grant) grant approved in February 2011 for one year. MedAccessRIDE transportation will be provided through a public private partnership involving FACT and Sol Transportation. FACT will procure three accessible minivans which will be leased to Sol for providing transportation to individuals with disabilities who wish to access medical services (non-emergency) only. Approximately 1,300 one way vehicles trips will be provided over the term of the project.

MedRIDE and MedAccessRIDE will remain the operational names of the services described above for grants management purposes. However, all transportation brokerage services provided through FACT moving forward will be integrated into the RideFACT service umbrella for marketing, outreach, and promotional purposes. Customers (existing and potential) are growing increasingly familiar with the RideFACT name as the safety-net transportation option in San Diego County. Marketing new services as an expansion of eligibility to RideFACT will ease the customer service experience and customers will only need to familiarize themselves with a singular RideFACT service.

4.1.5 WorkRIDE (unfunded project)

WorkRIDE was a Job Access and Reverse Commute (JARC) grant proposal to provide transportation from designated group homes, shelters, training centers and other programs sites to and from employment related destinations.

In 2010 and 2011, FACT and the Alliance for Regional Solutions (ARS), a coalition of social service agencies, jointly applied for JARC funds. However, the project was not ranked high enough for funding. FACT did not reapply for funds in 2012. As of 2014, the JARC program merged with FTA Sections 5307 and 5311 (formula grants) and non-profits are no longer eligible recipients. FACT will continue to explore future funding opportunities for this project.
4.1.6 Enhanced Customer Assistance and Outreach

In 2013, a four-student team from California State University, San Marcos (CSUSM) conducted a study of customer satisfaction and industry benchmarking. The purpose of the project was to:

- Test and implement customer surveys for FACT customers
- Research the industry and benchmark comparable transportation coordination and brokerage systems
- Develop recommendations to improve the customer service experience.

The report, titled “FACT: Report of Customer Surveys and Benchmarking”, found that 92% of riders surveyed were satisfied overall with the FACT services they received. The study included interviews with FACT employees, riders, observations by the student team and research of peer services.

FIGURE 4-1: CSUSM STUDENT REPORT RECOMMENDATIONS

<table>
<thead>
<tr>
<th>SHORT-TERM RECOMMENDATIONS</th>
<th>FOLLOW-UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dedicated 24-hour cancellation phone line</td>
<td>Seek input from Service Development Committee; discussion with 2-1-1</td>
</tr>
<tr>
<td>Update internet and marketing info.</td>
<td>Review with Service Development Committee</td>
</tr>
<tr>
<td>Create a comprehensive services description for marketing to medical /senior centers</td>
<td>Service Development Committee for review and input</td>
</tr>
<tr>
<td>Change to policies regarding confirmation of trips</td>
<td>Staff to discuss feasibility</td>
</tr>
<tr>
<td>Follow-up on referrals</td>
<td>Staff and CAM to discuss feasibility</td>
</tr>
<tr>
<td>Offer more flexibility (for short notice changes)</td>
<td>Staff to discuss feasibility</td>
</tr>
<tr>
<td>Additional training for mobility coordinators</td>
<td>Sensitivity training and role-play to address challenging customer interactions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LONG-TERM RECOMMENDATIONS</th>
<th>FOLLOW-UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policies and Procedures Manual and/or “Rider’s Guide”</td>
<td>Seek input from Service Development Committee; discussion with 2-1-1</td>
</tr>
<tr>
<td>Establish relationships with referral programs to offer 3-way connections</td>
<td>Review with Service Development Committee and CAM</td>
</tr>
<tr>
<td>Extended hours of operation</td>
<td>Service Development Committee for review and input, 211</td>
</tr>
<tr>
<td>Change to policies regarding confirmation of trips</td>
<td>Staff to discuss feasibility</td>
</tr>
<tr>
<td>Share information with other San Diego County organizations</td>
<td>Ongoing</td>
</tr>
</tbody>
</table>
In August 2014, with a grant from the County of San Diego Neighborhood Reinvestment Program, hosted a Travel Connections outreach event in County Supervisorial District 3, and developed an updated FACT Rider’s Guide.

In 2015, FACT will explore improvements to the Mobility Management Center which will provide additional personalized assistance with accessing other services. FACT staff will guide individuals through the eligibility procedures for regional transportation related services – for example, if requested, staff will provide assistance with:

- making reservations with other services on behalf of riders, or
- helping with completing ADA eligibility paper work, or
- scheduling transfer rides between systems

FACT will offer enhanced outreach to service providers who are not currently in the service provider database. FACT’s Mobility Coordinators will contact existing services for program updates as well as research new programs in the county. FACT will also market our services through CAM, TAC and other councils to encourage all service agencies to partner with FACT.

### 4.1.7 Technical Assistance Workshops

FACT plans to host 6 workshops and one regional Mobility Forum in the next 2 years. The workshops were approved as part of a New Freedom 2010-11 grant. The workshops will assist specialized services operators and stakeholders in planning for the transportation needs in the region. The mobility forum will engage service planners and stakeholders in a dialogue to promote coordinated service planning. Staff has surveyed CAM members and developed a list of workshop topics prioritized according to the feedback.

In October 2013, FACT hosted the first workshop. Twenty-eight (28) transportation professionals from several states participated in a two-day National Transit Institute (NTI) workshop on Managing Community Mobility. The remaining workshops are in the various stages of planning.

In 2015, FACT and 2-1-1 San Diego will host Veterans Mobility Forums to solicit input and feedback on a mobility survey and address barriers to mobility. While the forums are geared towards veterans’ mobility issues, the forums will be publicly announced and all audiences are welcome to attend.

### 4.1.8 Contracted Services

FACT has continued to work with partners on specific proposals in response to procurement initiatives and outreach efforts.

In January 2013, FACT and Poway Adult Day Health Care Center (ADHC) entered into an agreement for transportation services to and from Poway ADHC. Additional partnership proposals are in the works with agencies including AmeriCare Adult Day Healthcare Center, and the San Diego Regional Center.

In September 2013, the City of Oceanside awarded FACT a contract to provide Van Transportation Service as part of its Solutions for Seniors on the Go program. There are roughly 1,000 seniors approved to ride the service at this time. The service area includes Oceanside as well as medical centers in the neighboring cities of Encinitas, Carlsbad, San Marcos and Vista. Approximately 6-8 one-way trips are delivered daily through this service.
In December 2013 NCTD’s ADA paratransit contract was transitioned from ALC to First Transit. First Transit approached FACT for a proposal to broker a portion of the ADA paratransit (LIFT) service. In March 2014, NCTD & First Transit contracted with FACT to provide up to 6.8% of their LIFT trips, approximately 11,900 trips, per year. FACT expects to receive 40-50 one-way trips per day under this service agreement. This contract has nearly doubled FACT’s productivity in providing trips through the brokerage. As a result, FACT hired two additional Mobility Coordinators to provide assistance with coordinating transportation requests and referrals.

**MTS Access Paratransit Service**

FACT discussed the possibility of assisting MTS with the Access paratransit service at some point in the future. Currently, there are no plans for a service contract between MTS and FACT. While FACT has experienced some success with NCTD/First Transit for the LIFT program, the volume of trips has been inconsistent and the level of success was below projections. While FACT will seek more stability with a continuation of the LIFT program, it will continue to monitor progress of a potential service contract with MTS.

### 4.1.9 Veterans’ Mobility Initiatives - Coordination with SANDAG and 2-1-1

FACT was recently awarded a VTCLI grant for veterans’ mobility services in partnership with 2-1-1 San Diego and SANDAG. The project will improve veterans mobility through an enhanced directory of transportation resources, a one-click transportation website, 24/7 live telephone service, a free mobile app, 20 interactive information kiosks, etc.

The 36-month project commenced in 2014 and includes 3 phases: Short term planning and contracting activities (Months 1-12), midterm integrating and implementing activities (Months 13-24), and long term evaluation and reporting activities (Months 25-36).

In January 2015, FACT and 2-1-1 jointly released a Veterans & Military Families Transportation/Mobility Survey. The purpose of the survey is to better understand needs to improve access to information and transportation options for Veterans and their families, as well as the public at-large. Two types of surveys designed and distributed to known transportation and veteran/military organizations to gather community input on the top needs, challenges, gaps in services and opportunities for improvement in the mobility of veterans and military:

1. Organization/Provider Survey to be completed by a representative of the organization or program
2. Customer Surveys to be completed by persons served by the organization or program

In 2015, FACT and 2-1-1 will collect and analyze survey responses. Additionally, FACT and 2-1-1 will participate in Mobility Forums to gather input from attendees. Forums will utilize existing venues (CAM, United Veterans Council, San Diego Veterans Coalition) to gather feedback from the community to incorporate into the mobility assessment. Other known community data available on the mobility of veterans and military will be incorporated. All of the feedback gathered through the surveys, outreach, and forums will be developed into a comprehensive report demonstrating the successes, challenges and opportunities to improve the mobility of veterans and military in the community.
4.2 Proposed Long Term Services (3-5 Years)

4.2.1 Medical/Dialysis Transportation Coordination

FACT is in the process of reviewing transportation services offered by major hospitals/medical services providers. Several hospitals including Veterans hospitals (V.A. La Jolla, Balboa Navy), Scripps and SHARP offer varying levels of transportation services to support their programs, however they are not coordinated with other providers and the cost and operating structures are inconsistent.

Dialysis transportation has been a boon to RideFACT’s positive quality of life impact throughout the County. In 2014, FACT performed 3,906 trips to dialysis centers, accounting for approximately 35% of RideFACT trips in that year. In 2013, dialysis trips accounted for roughly one-fourth of RideFACT trips. Projections indicate that dialysis trips will continue to grow and will inevitably tighten FACT’s limited resources. Chapter 6 (Service Projections & Demand Management) further explains this issue and outlines demand management strategies that FACT is exploring.

FACT has been working with dialysis centers and hospitals to engage them in the process of coordinating services with other providers in order to reduce their expenses and optimize the impacts of their services for customers. The medical transportation services predominantly serve seniors and persons with disabilities.

Health Navigation Program

2-1-1 San Diego currently has a Health Navigation Program that provides needs assessments, care coordination, insurance information, and advocacy. FACT and 2-1-1 plan to discuss a special project to connect riders to the health navigation program. An optional insurance assessment through the health navigation program may benefit riders by determining other options for financing their transportation that may be available to them. FACT and 2-1-1 will research insurance companies and policy information to explore any potential benefits that may support transportation.

4.2.2 MediCal/MEDICAID Transportation Provider

FACT is working with HHSA staff, hospitals, dialysis centers, as well as 2-1-1 San Diego to understand the dual eligible clients for Medicaid and Medicare services to coordinate services provided to those individuals, including potentially, brokered transportation.

In 2014, FACT began exploring healthcare developments related to the Affordable Care Act (ACA) and how it affected FACT as a non-profit transportation provider. While the ACA itself did not provide transportation services, other programs such as Cal MediConnect could potentially be more viable options. Cal MediConnect is a program that promotes coordinated health care delivery to seniors and persons with disabilities who are dually eligible for MediCal and Medicare. The program moves patients into a managed care plan for their long term service needs. Care management services are deemed responsible for taking care of transportation needs for beneficiaries. Patients enrolled in a Medicare Advantage Plan (Part C) may be covered for some non-ambulance transportation to dialysis centers and doctors (Source: http://www.medicare.gov/people-like-me/esrd/dialysis-information.html).

Legal Aid Society of San Diego has recently been designated as the health consumer assistance organization to coordinate health care delivery activities statewide. In December 2014, Gregory Knoll, Esq., Executive Director
and Chief Counsel for Legal Aid Society of San Diego, presented at FACT on Non-Emergency Medical Transportation (NEMT) and Non-Medical Transportation (NMT) Services in Medi-Cal and Cal MediConnect.

FACT is exploring ways for dialysis transportation to qualify for both NEMT and NMT for Medi-Cal and Cal MediConnect assistance. FACT is also exploring opportunities to partner with managed care plans as a source for compensating dialysis trips and possibly other non-emergency medical trips.

4.3 Proposed Long Term Services (3-5 Years)

4.3.1 Coordinated Maintenance Program

FACT is working with local agencies to develop a coordinated maintenance program. The program would serve the maintenance needs of the brokerage at reasonable rates. It would also be a resource for all non-profits in San Diego that need maintenance services.

4.3.2 Projects Deferred for Future Consideration

Due to FACT’s present budgetary constraints, the following projects are being deferred for future consideration:

- **Mobility Management for Seniors with a Diversity of Needs** – Due to other regional services offering specialized services to seniors, such as NCTD’s Transit Buddy Travel Training program, this project has been prioritized lower.

- **Volunteer Driver Program Resource Allocation** - FACT does not have flexible or operating funds to provide assistance to the volunteer driver programs. FACT has provided advertising for volunteer driver recruitment on its website and in future we will plan for FACT training workshops that would be a benefit for volunteer drivers and transportation providers. Due to ongoing concerns with sustainable funding for FACT and available funding earmarked for specific purposes, it is unlikely that this project will be funded.

- **Highway 5 Mitigation Measures** - FACT will pursue funding or services as mitigation measures for the expansion of highway 5. In 2010, FACT submitted comments to Caltrans stating that FACT’s coordinated services are environmentally friendly and should be considered as mitigation to the environmental impacts of the expansion.

The following projects are available through other organizations and/or no longer being considered by FACT in the long-term:

- **Older Driver Wellness Program** – Older driver wellness trainings in San Diego County are available through the AARP CarFit program, an educational program that offers older adults the opportunity to check how well their personal vehicles “fit” them. The CarFit program also provides information and materials on community-specific resources that could enhance their safety as drivers, and/or increase their mobility in the community. The program is designed to keep seniors driving safely and help them build awareness of their own capabilities and knowing when to “give up the keys.”

**Guaranteed Ride Home Program** – The regional Guaranteed Ride Home (GRH) program is a service provided by iCommute, the regional commuter services program, and sponsored by SANDAG. The regional GRH program provides an unscheduled ride home for commuters who carpool, vanpool, bike, walk, use the COASTER, or MTS Premium Express Bus service (Routes 50/150, 210, 810, 820, 850, 860, 870, 960) to get to work at least three times per week. To be eligible, the individual must register with iCommute.
Chapter 5: Funding

5.1 Current Funding Sources

5.1.1 Grants

FACT’s funding is comprised of dedicated State Transportation Development Act Article 4.5 (TDA 4.5) funds as well as discretionary sources that include USDOT and County grants.

TDA funds comprise an ongoing source of funds that are annually committed as per the CTSA contract with SANDAG. TDA funds vary based on the status of tax revenue; FACT’s 2014 allocation is approximately $120,514. FACT’s CTSA (TDA) funds are not indexed for growth and fluctuate according to sales tax receipts. One of the requirements of the CTSA contract is to look for revenue to implement or increase services.

The most significant source of funding for FACT has been FTA New Freedom grants. New Freedom program funds are discretionary and awarded through a competitive regional process. Most of FACT’s New Freedom awards were earmarked for mobility management, which does not cover service operations or contracted transportation services. Although New Freedom funds may be used for operations, FACT does not have the means to match operating grants at the higher matching rate (50%). In addition, FACT receives TransNet grants (Senior Mini Grant) that are also based on local tax revenues and are awarded through a competitive process. Due to the need for specialized transportation services in San Diego, there has been significant demand for FTA and TransNet funds.

Due to the short-term and sporadic nature of discretionary grants, FACT is not in a position to plan for long range programs or contracts. FACT is looking at several initiatives to secure additional sustainable funds in order to meet long range goals and to provide services in a cost effective manner.

TABLE 5-1: SOURCES AND STATUS OF FACT FUNDING

<table>
<thead>
<tr>
<th>Capital Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>State 5317 New Freedom FFY 11-12 (Caltrans - Cycle 6)</td>
<td>Capital vehicle and equipment for rural area service</td>
<td>$115,000</td>
<td>Active</td>
</tr>
<tr>
<td>FTA Section 5310</td>
<td>Transportation for Individuals with Disabilities (7 accessible vehicles)</td>
<td>$315,000</td>
<td>Active</td>
</tr>
<tr>
<td></td>
<td>Transportation for Individuals with Disabilities (13 accessible vehicles)</td>
<td>$598,000</td>
<td>Active beginning Fall 2015</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Capital (cont.) Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTA Section 5310</td>
<td>Transportation for Individuals with Disabilities (7 accessible vehicles)</td>
<td>$240,000</td>
<td>Active beginning Winter 2016</td>
</tr>
<tr>
<td>Senior Mini-Grant FY16-17</td>
<td></td>
<td>$60,000</td>
<td></td>
</tr>
<tr>
<td>New Freedom 2010</td>
<td>MedAccessRIDE</td>
<td>$36,000</td>
<td></td>
</tr>
</tbody>
</table>
### Mobility Management

<table>
<thead>
<tr>
<th>Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Freedom 2006</td>
<td>Mobility Management</td>
<td>$107,007</td>
<td>CLOSED</td>
</tr>
<tr>
<td>New Freedom 2007</td>
<td>Mobility Management</td>
<td>$519,632</td>
<td>CLOSED</td>
</tr>
<tr>
<td>New Freedom 2008</td>
<td>Mobility Management</td>
<td>$450,686</td>
<td>CLOSED</td>
</tr>
<tr>
<td>New Freedom 2010-11</td>
<td>Mobility Management (MedAccessRIDE) Year 1</td>
<td>$224,000</td>
<td>Active</td>
</tr>
<tr>
<td>Senior Mini Grant 2010</td>
<td>Mobility Management (MedAccessRIDE) Year 2</td>
<td>$56,000</td>
<td>Active</td>
</tr>
<tr>
<td>CTSA TDA 4.5</td>
<td>Mobility Management (MedAccessRIDE) Year 2</td>
<td>$179,523</td>
<td>Active</td>
</tr>
<tr>
<td>State 5317 New Freedom FFY 11-12</td>
<td>Mobility Management – Enhance Service in Rural Areas</td>
<td>$160,000</td>
<td>Active</td>
</tr>
<tr>
<td>Toll Credits</td>
<td></td>
<td>$40,000</td>
<td></td>
</tr>
<tr>
<td>State 5317 New Freedom FFY 11-12</td>
<td></td>
<td>$160,000</td>
<td>Active beginning February 2015</td>
</tr>
<tr>
<td>Toll Credits</td>
<td></td>
<td>$40,000</td>
<td></td>
</tr>
<tr>
<td>State 5317 New Freedom FFY 11-12</td>
<td></td>
<td>$160,000</td>
<td>Pending (January 2016)</td>
</tr>
<tr>
<td>Toll Credits</td>
<td></td>
<td>$40,000</td>
<td></td>
</tr>
<tr>
<td>Veterans Transportation and Community Living Initiative (VTCLI)</td>
<td>Veterans mobility admin.</td>
<td>$52,778</td>
<td>Approved</td>
</tr>
<tr>
<td>FTA Section 5310 FY 13-14</td>
<td>Admin of Medical/Dialysis Transportation (MM)</td>
<td>$400,000</td>
<td>Approved</td>
</tr>
<tr>
<td>Senior Mini-Grant FY 16-17</td>
<td>Admin of Medical/Dialysis Transportation (MM)</td>
<td>$285,151</td>
<td>Approved</td>
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</tbody>
</table>

### Mobility Management (cont.)

<table>
<thead>
<tr>
<th>Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Freedom 2012</td>
<td>Sustain Mobility Management (FY 14)</td>
<td>$120,000</td>
<td>Approved</td>
</tr>
<tr>
<td>Senior Mini-Grant FY 14</td>
<td></td>
<td>$30,000</td>
<td></td>
</tr>
<tr>
<td>Senior Mini-Grant FY 15</td>
<td>Sustain RideFACT Brokerage (FY 15)</td>
<td>$63,505</td>
<td>Approved</td>
</tr>
<tr>
<td>New Freedom 2012</td>
<td>Sustain Mobility Management (FY 14)</td>
<td>$50,000</td>
<td>Approved</td>
</tr>
<tr>
<td>New Freedom 2012</td>
<td>Expand RideFACT Brokerage (FY 14)</td>
<td>$50,000</td>
<td>Approved</td>
</tr>
<tr>
<td>CTSA TDA 4.5 (Match)</td>
<td>Expand RideFACT Brokerage (FY 14)</td>
<td>$12,500</td>
<td>Approved</td>
</tr>
<tr>
<td>New Freedom 2012</td>
<td>Expand Mobility Management (FY 15)</td>
<td>$200,000</td>
<td>Approved</td>
</tr>
</tbody>
</table>
### Operating

<table>
<thead>
<tr>
<th>Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Mini Grant 2009</td>
<td>RideFACT</td>
<td>$125,000</td>
<td>CLOSED</td>
</tr>
<tr>
<td>Senior Mini Grant 2010</td>
<td>MedRIDE (2 Years)</td>
<td>$400,000</td>
<td>Active</td>
</tr>
<tr>
<td>New Freedom 2010</td>
<td></td>
<td>$100,000</td>
<td></td>
</tr>
<tr>
<td>Senior Mini-Grant FY 15</td>
<td>RideFACT Trip Reimbursement</td>
<td>$125,000</td>
<td>Active</td>
</tr>
<tr>
<td>New Freedom 2012</td>
<td></td>
<td>$125,000</td>
<td></td>
</tr>
<tr>
<td>Senior Mini-Grant FY 16-17</td>
<td>RideFACT Trip Reimbursement</td>
<td>$400,000</td>
<td>Approved</td>
</tr>
<tr>
<td>FTA Section 5310 FY 13-14</td>
<td></td>
<td>$360,000</td>
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</table>

### Small Grants

<table>
<thead>
<tr>
<th>Grant</th>
<th>Program Name</th>
<th>Total Funding</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Enhancement (County)</td>
<td>Travel Connections outreach event in District 3</td>
<td>$2,000</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>Veterans Mobility Training; promote expansion of FACT services in non-urban areas; staff support</td>
<td>$2,000</td>
<td>Active</td>
</tr>
<tr>
<td>Neighborhood Reinvestment Program (County)</td>
<td>Telecommunications upgrades; produce a FACT Rider’s Guide</td>
<td>$3,500</td>
<td>CLOSED</td>
</tr>
<tr>
<td></td>
<td>IT upgrades; produce FACT video</td>
<td>$9,000</td>
<td>CLOSED</td>
</tr>
</tbody>
</table>

### 5.1.2 Agency Contracts

FACT’s brokerage has made it possible to purchase trips at a low cost for other agencies. FACT seeks to establish service contracts with other agencies to increase the efficiency of trips and ensure the sustainability of projects. FACT charges an administrative fee for this service. The administrative fees will supplement funds to sustain FACT services and projects.

FACT has had discussions with County HHSA to create awareness of the potential for providing services as well as for leveraging County funds against FACT resources. Since 2013, FACT has established agency contracts for the following services and partnerships:

2013
- Poway Adult Day Health Care Transportation
- Oceanside Senior Transportation Van Service
Foster Youth Student Transportation.

2014
- LIFT Paratransit Service (NCTD/First Transit)

2015
- ElderHelp (Seniors-A-Go-Go)

5.2 Potential Funding Sources

5.2.1 Extended Mobility Management Services
FACT will continue to work with County HHSA and medical transportation service providers including Scripps, Sharp and Palomar Pomerado Health and others to promote cost effective transportation services.

FACT will assist the medical service providers in assessing the effectiveness of their current transportation services and work with them in exploring other options that would meet their business objectives as well as promote greater mobility for the consumers. Currently, dialysis trips are roughly 25% of the current volume of RideFACT service. FACT is working with dialysis centers to encourage them to share the cost of transportation.

5.2.2 NEMT (Non-Emergency Medical Transportation)
FACT is currently working with CalTrans in order to fund a Non-Emergency Medical Transportation (NEMT) White Paper to document the benefits of coordinated transportation system utilizing all modes of public transportation for providing trips for preventive care and routine medical appointments. Many of the Medicaid funded trips could be performed by public transportation services or community based services which are typically much less expensive than Medicaid approved private service providers.

The white paper would create a basis for action at the County and State level to encourage greater coordination of transportation resources for medical transportation.

5.2.3 Small Grant Program Awards
In 2013, FACT was awarded a California Teleconnect Fund, cutting its telecommunication expenses in half. FACT is eligible to participate in the CTF program and receive discounts on eligible telecommunications services. FACT also received small grants from the County of San Diego Community Enhancement and Neighborhood Reinvestment programs. These County grants provide funding for a Travel Connections outreach event in County Supervisorial District 3, telecommunication upgrades, and developing a FACT Rider’s Guide.

In 2014 and 2015, FACT was awarded County Neighborhood Reinvestment Program funds for IT upgrades, production of an updated FACT video, and printing of a FACT Annual Report.

5.3 Potential Long-Term Funding Sources

5.3.1 Quality of Life Initiative
FACT has been active in the Stakeholder Working Group (SWG) that was appointed by SANDAG to identify the scope of programs that will be included in the Quality of Life (QoL) tax initiative, which is in process. QoL has identified coordination of transportation services for seniors and persons with disabilities as a part of the public transportation component that is included in the initiative as a funding priority.
In public comments before the QoL SWG as well as communications with SANDAG staff, FACT has requested that the CTSA be included in the initiative as the entity that would receive some funds to coordinate social services transportation for seniors and persons with disabilities. As the agency competitively designated as the CTSA by SANDAG, FACT is already tasked with coordination of such services in San Diego County.

### 5.3.2 Regional Plan

FACT will work with SANDAG and other stakeholders to prioritize regionally coordinated services for persons with disabilities, seniors, and veterans in the next iteration of the Regional Plan, which will be a combination of the former Regional Comprehensive Plan (RCP) and Regional Transportation Plan (RTP). FACT provides service statistics to SANDAG as baseline data to create awareness about the demand for specialized transportation services.

### 5.3.3 Contracted Services

**Poway Adult Day Health Care Transportation**

In January 2013, FACT and Poway Adult Day HealthCare Center (PADHCC) partnered to provide recurring trips to a small group of riders attending PADHCC. This service began as a pilot project in order to assess FACT’s ability to group trips effectively, as well as assess the contractor’s ability to handle the requirements of grouped rides. Due to recent successes of the program, PADHCC has opted to rely on FACT for their future transportation needs. PADHCC pays an administrative fee to FACT to provide the resources needed to accommodate PADHCC trips. The PADHCC transportation service accounts for an estimated 400 trips per month, roughly ¼ of the total RideFACT trips provided per month. Projected revenues from this contracted service are shown in Table 6.1.

**Oceanside Senior Transportation Van Service**

In September 2013, FACT was awarded a contract (valued at $66,150) by the City of Oceanside in response to a competitive procurement for Senior on-demand transportation services. Seniors who are eligible to ride the Van Service are preapproved by City of Oceanside staff through a registration process. The program requirements include a 3-7 day advance reservation, verification of client eligibility, and providing call center support as well as transportation through the brokerage. There are roughly 1,000 seniors approved to ride the service at this time. The service area includes Oceanside as well as medical centers in several neighboring cities including Encinitas, Carlsbad, San Marcos and Vista. Approximately 6-8 one-way trips are delivered daily through this service. Projected revenues from this contracted service are shown in Table 6.1.

**Foster Youth Student Transportation**

In December 2013, FACT was awarded a contract for foster youth transportation services by the San Diego County Office of Education. The purpose of the transportation program is to provide safe, reliable professional transportation for foster youth students to and from their school of origin. FACT proposed to use two (2) transportation providers in the Brokerage to operate the service. Projected revenues from this contracted service are shown in Table 6.1.

**NCTD/First Transit LIFT Service**

In December 2013 NCTD’s ADA paratransit contract was transitioned from American Logistics Company (ALC) to First Transit. First Transit approached FACT for a proposal to broker a portion of the ADA paratransit (LIFT) service. In March 2014, NCTD & First Transit contracted with FACT to provide up to 6.8% of their LIFT trips,
approximately 11,900 trips, per year. FACT expects to receive 40-50 one-way trips per day under this service agreement. Projected revenues from this contracted service are shown in Table 6.1

Chapter 6: Service Projections & Demand Management

FACT has developed service projections to guide funding requests and plan for future years. Overall demand for transportation services is expected to increase throughout the region in response to growing rates of population, housing, and economic growth, as well as changes in demographics and travel behavior. The availability of social services and medical facilities relative to where people live will be a key factor in determining future demand. Service availability is based on funding commitments and revenue projections.

FACT will continue providing referrals assistance to ensure riders utilize any available transportation services in their area. Table 6.1 shows projected services in one-way trips and other service units (web hits, referrals, and people trained), as well as projected funds for operating, capital, and mobility management projects.

Demand Management

RideFACT has experienced rapid growth since its countywide implementation in June 2012. Ridership reached 2,623 trips by the end of calendar year 2012. Since 2013, FACT’s contracted services have played an increasingly important role in its brokered transportation services. In 2013, ridership for RideFACT and contracted services jumped to 14,462 trips. In 2014, ridership for RideFACT and contracted services increased to 20,206 trips. Despite the surge in ridership, FACT’s operating funds for subsidizing trips have remained relatively constant over the past few years. FACT is exploring means to effectively manage resources to meet demand for trips as well as lessen the cost burden of providing its brokered transportation services. Contracted services have helped in this regard by providing an opportunity for FACT to partner with agencies to provide transportation on their behalf for a small administrative fee that offsets a portion of the actual cost of trips.

Among the various trip purposes FACT accommodates, individuals seeking non-emergency medical transportation to dialysis centers have accounted for the most trips. Figure 6.2 shows the 3 major dialysis center organizations in San Diego County that FACT provides transportation. From January-December 2014, 97% of dialysis trips were to Fresenius facilities (includes former Renal Advantage facilities). In 2014, FACT performed 3,906 trips to dialysis centers (Fresenius and Davita), accounting for approximately 35% of RideFACT trips in that year. In 2013, dialysis trips accounted for roughly one-fourth of the overall number of trips performed by RideFACT during that year. Demand for trips to dialysis centers continues to grow, and FACT is exploring ways to manage that demand. A few options have already been discussed by the Service Development Committee for future consideration:

- Enforce a cap on the number of miles a rider can travel using FACT within a given month. The current mileage cap is set at 150 miles per rider per month to be enforced as needed.
- Negotiate arrangements with dialysis centers to financially support the growing trip volume to their respective facilities.

Growth Management

Growth management is essential for FACT to sustain its services. FACT will continue working with other transportation providers to streamline the referrals process to improve the customer experience. Agency contracts have allowed FACT to charge administrative fees, providing additional financial support for transportation services.
Vehicle purchases through grants are absorbing much of this growing demand while keeping down FACT’s purchase cost per trip. Caltrans recently awarded FACT thirteen (13) new minivans to address demand for senior/disabled trips.
**FIGURE 6.1 – RideFACT, MOBILITY MANAGEMENT, CAPITAL, AND CONTRACTED SERVICE PROJECTIONS**

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<thead>
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<tbody>
<tr>
<td><strong>RideFACT OPERATING GRANTS + ADMIN REVENUES (Oceanside &amp; Poway)</strong></td>
<td></td>
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<tr>
<td>Projected Funds</td>
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<td>One-way passenger trips</td>
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<td>25,841</td>
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<td>Avg. Cost per Trip¹</td>
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<tr>
<td><strong>CAPITAL GRANTS</strong></td>
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<tr>
<td>No. of vehicles²</td>
<td>11</td>
<td>32</td>
<td>24</td>
<td>19</td>
<td>12</td>
<td>7</td>
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<td>Total One-way passenger trips</td>
<td>8,284</td>
<td>25,084</td>
<td>18,364</td>
<td>15,960</td>
<td>10,080</td>
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<tr>
<td>Average cost per trip³</td>
<td>$24.00</td>
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<td>$24.00</td>
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<td>$24.00</td>
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<tr>
<td><strong>MOBILITY MANAGEMENT GRANTS</strong></td>
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<td>Projected Funds</td>
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<td>Service Units⁴</td>
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<td>Avg. Cost per Service Unit</td>
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<td><strong>CONTRACTED SERVICE REVENUES</strong></td>
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<td>Poway Adult Day Health Care (PADHCC)⁵</td>
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<td>Trips</td>
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<td>Oceanside Senior Van Service⁵</td>
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<td>SDCOE Foster Youth Transportation</td>
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<td>Trips</td>
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<td>NCTD/First Transit LIFT</td>
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<td>$225,092</td>
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<tr>
<td><strong>FACT Total one-way passenger trips</strong></td>
<td>38,312</td>
<td>55,984</td>
<td>47,075</td>
<td>18,358</td>
<td>10,080</td>
<td>5,880</td>
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</table>

¹ Average cost per trip in 2014-15 is based on the purchase price FACT pays to a provider in the brokerage or taxi service for a RideFACT trip. 2.5% projected increase in average purchase cost for future years.

² Number of awarded vehicles to FACT expected to be in active service; each vehicle is leased out to a third-party contractor in the brokerage for a

³ Average cost per trip for Capital Grants is based on projected trips from vehicles to be procured and in active service. Costs per trip using leased vehicles are drawn down from the purchase or market value of the vehicles.

⁴ Service units include referrals to other services, referrals to RideFACT service, web hits, workshops held, workshop attendees, and persons trained.

⁵ Poway and Oceanside contracted services are shown here as information only; trips and admin revenues are counted with RideFACT to determine FACT’s purchase price (Avg. Cost per Trip).

Note: This service and revenue forecast is intended to serve only as a guide and is subject to change. This table does not reflect any future funding requests or contracted services.
FIGURE 6.2 – DIALYSIS TRIPS PERFORMED ON RideFACT: JANUARY – DECEMBER 2014

DIALYSIS TRIPS JAN - DEC 2014: 3,906

- **RENAL ADVANTAGE**
  - 3,779

- **DAVITA**
  - 127

**DAVITA**

**RENAL ADVANTAGE**
Appendix 1 – CTSA Work Plan

Full Access & Coordination Transportation, Inc. (FACT)
Consolidated Transportation Services Agency (CTSA) for San Diego County

Work Plan for Fiscal Year 2015-2016

As defined in the Social Services Transportation Improvement Act (AB 120), the CTSA is a public entity responsible for improving transportation services required by social service recipients by promoting the consolidation and coordination of social service transportation services. The scope of CTSA activities include being the regional broker of social service transportation information, centralized administration and dispatching, identification and consolidation of funding sources, coordinated and consolidated training programs and combined purchasing of vehicles, supplies and equipment. The CTSA works to create dedicated transportation services for people with disabilities, senior citizens, social service agencies, health care providers, various organizations and individuals within that particular service area. The CTSA is also the planning representative of the social service transportation community and works with the region to develop updates to the Coordinated Plan. The CTSA has begun the process to update the Business Plan (2016-21 Business Plan Update) that forms the planning foundation for organizational development and the expansion of coordinated services in the region.

Expenses:

One-call/one-click Mobility Center

Maintain FACT website
  o Maintain FACT to keep content current, optimized for searching
  o Use website for marketing and outreach

Maintain transportation provider database
  o Update content of the provider database on an ongoing basis
  o Conduct outreach with potential new providers
  o Optimize website travel planner for finding suitable transportation

Telephone Referrals

Respond to telephone requests for transportation information. Educate callers about transportation options from database. Offer RideFACT transportation as appropriate.

Provide enhanced in-person customer service where necessary to assist with ADA application process or take reservations for other providers, etc.

Brokerage

Transportation brokerage was established in 2012:

Maintain provider contracts
Recruit new transportation providers
Manage rates to ensure optimum pricing for purchased trips
Increase the capacity of the brokerage by offering assistance to vendors
Purchase and implement brokerage management software

RideFACT transportation
  • Manage referrals to RideFACT if no other options are found
  • Manage reservations, scheduling and delivery of trips
• Manage timely reporting, invoicing, payments
• Manage timely inspections of vehicles and records and customer service records to ensure safety
• Manage compliance with all grants related and other applicable regulations
• Develop parameters for new services for persons with disabilities and veterans

**Regional Coordination**

**Administer Council on Access and Mobility (CAM)**

• Conduct Council on Access and Mobility (CAM) meetings bimonthly.
• Continue outreach to providers to fill all 30 available seats. 25 are currently filled.
• Represent CAM during level three or higher emergencies in the Emergency Operations Center and coordinate disaster response as needed
• Coordinate information provision and involvement of CAM members with the County EOC to ensure effective preparedness planning and to compliance with new State and Federal requirements

**Support for grantees**

• Provide letters of support to agencies applying for grants after verifying coordination efforts.
• Assist applicants in finding coordination opportunities
• Form partnerships to apply for grants where appropriate
• Offer compliance related information to grantees

**Training workshops**

Coordinate training and workshop opportunities for human service transportation providers in such areas as Federal and State funding requirements (e.g. 5310), driver training, vehicle inspection, insurance, Regional Emergency Preparedness Requirements, State and Federal regulations, safety, funding opportunities, coordination, vehicle acquisition etc.

Initiate coordinated programs in areas of training (e.g. insurance, maintenance, vehicle inspections) that are pertinent based on interest / commitments of involvement from CAM members

**Coordinated Planning**

• Work with SANDAG and the community to develop the locally developed Public Transit and Human Services Transportation Coordinated Plan.
• Provide ongoing technical assistance and support to human service transportation providers and all other interested parties to find solutions to overcome identified barriers to coordination, consolidation and collaboration
• Coordinate and conduct surveys, and assessments, both formal and informal, to determine stakeholder transportation needs, vehicle and other relevant resources and barriers to coordination
• Make presentations to stakeholder groups

• Evaluate coordinated programs for pilot projects leading to regional deployment
• Work with 211 San Diego and SANDAG to administer and implement VTCLI grant

**CTSA Activities**

• Disseminate quarterly CTSA FACT Newsletter to ensure ongoing awareness of current related events
• Maintain the CTSA Mailing List
• Coordinate Annual Strategic Business Planning for FACT/CTSA
• Maintain an inventory of resources in San Diego County
• Participate in Triennial TDA Audits
• Complete all required reporting

• Annually update the business plan for FACT covering the following areas: governance, regional needs assessment, integration of current CTSA work activities, technical assistance and coordination planning, information and marketing initiatives, service contracting and operations programs, policy development and advocacy, trip demand estimation and utilization projections, funding and financial projections.
• Serve as liaison between public transportation providers and human service agencies
• Build a base of cooperation and coordination between constituencies, including public transportation providers, human service agencies, and other community-based organizations and agencies
• Provide technical assistance, information, and education programs to transportation providers
• Develop a regional training program for human service agencies and clients and consumers in partnership with public transit operators
• Maintain the FACT Board Technical Advisory Committee (TAC), which currently includes Janelle Carey (MTS), Danielle Kochman (SANDAG), and Lois Knowlton (Friends of Adult Day Healthcare Center), with one vacant seat.
• Market services through press releases, pamphlets, brochures, e-mail, newsletters, special informational pieces, newspaper articles, special events, workshops, and community training sessions
• Participate in regional disaster preparedness planning
• Present a regional Mobility Forum

**Management of CTSA Activities**

Maintain FACT’s staff to ensure capacity to support ongoing programs and services and expansion as per the approved Business Plan.

**Administration**

• Maintain memberships in State and National organizations committed to coordinated transportation and non-profit corporation development:
  o Community Transportation Association of America (CTAA)
  o California Association for Coordinated Transportation (Cal-Act)
  o American Public Transportation Association (APTA)

**Contracted Services**

• Accounting services
• Legal assistance
• Payroll services
- Audit services

Other Expenses
- Registration Fees
- Liability, D & O, Umbrella Insurance
- Workers’ Comp Insurance

Grant Support
- Provide local match support to Federal Transit Administration (FTA) New Freedom, Section 5310, Senior Mini-Grant, and other grants.

Training and Travel
- Conference/Travel

All TDA 4.5 funding for the fiscal year 2015-2016 will be used for core CTSA activities. FACT will continue to look for supplemental finding for CTSA activities from other sources.
Appendix 2 – Specialized Transportation Providers Maps

Survey Sample of Available Specialized Transportation Providers throughout San Diego County*

Number of Surveyed Providers By zipcode

- 0 - 5
- 6 - 10
- 11 - 15
- 16 - 20
- Above 20

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the providers located in San Diego and does not account for all available services.
Survey Sample of Available Senior Specialized Transportation Providers throughout San Diego County*

Number of Surveyed Providers
By zipcode

0 - 5
6 - 10
11 - 15
16 - 20
Above 20

*MAnalysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Survey Sample of Available Disabled Specialized Transportation Providers throughout San Diego County*

Number of Surveyed Providers
By zipcode
- 1 - 3
- 4 - 6
- 7 - 8
- 9 - 10
- Above 10

*Analysis is based on the responses from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Survey Sample of Available Low-Income Transportation Providers throughout San Diego County*

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
### Appendix 3 – Service Providers in FACT Database

#### Transportation Services for the General Public

- 24-7 Taxicab
- A Better Solution In Home Care Transportation
- AAA Transport, Inc.
- Ability Center Accessible Vans (Rent/Buy)
- Alpha Project Outreach Program
- Alta Golden
- American Cancer Society's Road to Recovery
- At Your Home Familycare Transportation
- Care 4U Mobility Non-Emergency Transportation
- Care A Van
- Carlsbad West Taxi Company
- CCSA - Clairemont Service Center
- CCSA - Joyce Snyder Center
- City of Vista Senior Nutrition Program
- CommConnect
- Community Mobile Connections
- Courtesy Cab
- Daily Patient Transport, Inc.
- DMCC Dial A Ride
- DMCC Shuttle
- Escondido Senior Center Transportation
- Fallbrook Taxi
- FISH Service Volunteer Driver Program
- Fun, Love & Care Transportation
- Golden Health Transportation
- Heritage Senior CareTransportation/Escort Program
- Hostelling International - San Diego - Downtown
- Hostelling International - San Diego - Point Loma
- iCommute Guaranteed Ride Home
- Joan's Journey Senior Transportation Program
- Lake San Marcos Kiwanis Club CARE Drive Program
- Love 2 Live Care Services
- National Runaway Home Free Program
- National Runaway Switchboard
- No Vacancy Transportation Program
- Paradise Valley Hospital Guest Transportation Serv
- Project CARE Taxi Voucher Program, San Marcos
- Reliable Transportation for Medical Appointments
- Ride With Emilio
- Rides by Right At Home
- Ryan White CARE Act
- Scripps La Jolla Mobile Shuttle
- Scripps Mercy Shuttle
- SD COMMUTE (MTS)
- SD COMMUTE (NCTD)
- Senior Service Council of Escondido
- Sharp Health Care Transportation
- Sol Transportation, Inc.
- Solana Beach Presbyterian Church Transportation
- Super Shuttle
- Tender Nursing & Home Care Transportation Service
- TLC Medical Transport
- Transit Van Shuttle
- Travel Training (Mobility Management Program)
- Travelers Aid Soc. - Family Reunification Program
- Travelers Aid Society of San Diego
- Tri-City Patient Transport Express
- UPLIFT Triple Cross
- Yellow Cab of North County
- Yellow Radio Service of San Diego

#### Transportation Services Only for Individuals Enrolled in the Program

- Adult Protective Serv Adult Day Healthcare Program
- Alliance for African Assistance Transportation
- ALS Association Transportation
- AmeriCare ADHC Transportation
- aNeededRide
- Blind Comm. Center Transportation for Craft Class
- Boys & Girls Clubs Chula Vista Transportation
- Boys & Girls Clubs North County Transportation
- Boys & Girls Clubs of San Diego
- Boys & Girls Clubs San Marcos Transportation
- Braille Institute Student Transportation Program
- Camp Pendleton Y-Shuttle
- Carlsbad Senior Center Transportation Services
- Casa de Salud Center
- CET - San Ysidro Student Shuttle Bus
- Charles Cheneweth Foundation ADHC Transportation
- City Link Foundation
- City of San Marcos Senior Center Transportation
- City of San Marcos Taxi Voucher Program
- College Ave. Nutrition Transportation
- Disabled American Veterans
- DMCC Volunteer Drivers
- Don Allen Parentcare Family Recovery Center
- Employment and Community Options
- Encinitas Senior Center Nutrition Lunch Program
- Fallbrook Senior Center Nutrition Program Transp.
- International Rescue Committee Transportation
- Kimball Senior Center
- La Maestra Family Clinic Transportation
- Lenora's Homecare Services Transportation
Transportation Services are Only for Individuals Enrolled in the Program (cont.)

- LIFT Transportation, ADA Paratransit Service
- LivHome Client Transportation Program
- MAAC Project Head Start Program
- Mountain Health Transportation Prog. Campo Clinic
- Mountain Shadows Commun. Homes Transportation Prog
- MTS Access
- National MS Society Pacific South Coast Chapter
- Neighborhood House ADHC Transportation
- Neighborhood House Senior Center Transportation
- New Entra Casa Transportation
- Noah Homes Transportation
- North County Inland Center
- Oceanside - Solutions for Seniors on the Go
- Oceanside Senior Nutrition Transportation
- On The Go
- Out & About Encinitas
- Out & About Peninsula
- Out & About Vista Senior Shuttle
- Out & About Vista Volunteer Drivers
- Paradise Senior Health Center
- PCI Global - Client Only Transportation
- Poway Adult Day Health Care
- Poway Senior Center Transportation
- Presbyterian Urban Ministries
- Redwood Club Transportation
- Redwood Elderlink Adult Day Healthcare
- Rides4Neighbors/Discount Taxi Program
- Rock Cancer CARE
- Rock Church Elderly Ministry
- S.D.Y.C.S. Storefront Teen Shelter
- Salvation Army Senior Nutrition Program
- Samahan Senior Center
- San Diego American Indian Health Center Outreach
- San Diego Center For The Blind-Transportation
- San Diego Regional Center
- Seniors-A-Go-Go
- Sharp Senior Health Ctr Downtown Patient Van Serv.
- Solana Beach Dial-A-Ride Taxi Voucher Program
- St. Madeleine Sophie's Center Day Programs
- The Care Van, Fallbrook
- Transit Buddy Program
- TransMed
- University City Older Adult Center
- UPLIFT Senior Partners Plus
- Uptown Faith Community Service Center
- VA Transportation Network Patient Travel
- Vista Community Clinic Transportation
Appendix 4 – FACT Service Area Map
Appendix 5 – FACT Title VI Plan & Non-Discrimination Program

FACT Equal Employment Opportunity (EEO), Title VI Complaint Procedures, and Non-Discrimination Program
http://www.factsd.org/non-discrimination-policy/

FACT Title VI Plan

FACT Title VI Plan Approval Letter from Caltrans