FACT

FACILITATING ACCESS TO COORDINATED TRANSPORTATION

BUSINESS PLAN
2024-2029

Table of Contents

Executive Summary

The Business Plan, originally adopted in 2009 and updated annually is a working document that serves as a detailed orientation into FACT services and direction in the near term. The annual updates help with keeping the focus on the current priorities and those on the horizon. With major changes occurring in the transportation industry due to Covid related service disruption, inflation, and labor scarcity there have been significant impacts on FACT's brokerage, service volume and capacity, productivity, and personnel, which are included in this update. Several other impacts like the new AFA service, trips funded by the American Cancer Society, and the ongoing discussions regarding FACT's role in pupil transportation are indicative of a wider recognition of FACT's role and capabilities as the Consolidated Transportation Services Agency (CTSA) for San Diego County, and its vision of filling gaps in existing transportation services.

The lack of adequate infrastructure in San Diego County for providing on-demand wheelchair accessible rides to the public was highlighted recently due to major requests for procurement from San Diego County HHSA, SANDAG's Flexible Fleets program and SANDAG's Access for All program. As a general public paratransit provider and CTSA, FACT is working to propose options to meet these mobility needs in a collaborative and cost-effective manner. Part of this effort will be sharing twelve new FACT owned wheelchair accessible vehicles with service providers during 2023. These service proposals reflect a renewed emphasis on equity in the planning and delivery of mobility services.

Contracted services, which provide FACT with an independent revenue source, are poised for a major growth spurt if any of FACT's service proposals for the County or SANDAG are successful. Given the large volumes of service anticipated under the agreements that are under review, FACT will need to adapt the service model and mix by including new and non-traditional services and vendors in the brokerage as well as comply with new requirements. More collaboration with TNCs may be needed to be able to ramp up to higher levels of service demand. FACT is also working with the current and potential taxicab vendors in the brokerage to encourage them to invest in more capacity and help them lower expenses by reviewing insurance options and sharing FACT owned vehicles. Including on-demand ambulatory as well as accessible services in the brokered service mix will impact the rider experience and expectations in a major way.

Other transportation needs and priorities described in the plan derive from the San Diego Association of Governments (SANDAG) 2020 Coordinated Plan, which analyzes transportation needs through surveys, data, and stakeholder input.

To plan for and support the demand for services effectively, FACT and SANDAG are engaged in an effort to streamline funding and make the process more predictable and consistent from funding cycle to cycle.

Given the increased importance of sharing resources and collaboration in a post pandemic environment, FACT will continue to engage all transportation interests in San Diego County to reassess and reinvent ways in which we can provide more services more effectively.

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 all San Diego County residents should have access to affordable transportation. The agency's primary 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 through a competitive procurement process. It is a designation under State law with a mandate to coordinate transportation services. The CTSA agreement was updated in May 2019 to reflect scope of services more accurately.

> *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.*

Since 2012, FACT has operated under its DBA (Doing Business As) name, Facilitating Access to Coordinated Transportation.

1.2 Mission

"*Assist San Diego County residents with barriers to mobility to achieve independence through coordination of transportation services.*"

FACT provides services that assist San Diego County residents who do not have access to convenient and affordable transportation. FACT maintains a database of all transportation services in the County. The Mobility Coordinators assist callers with identifying the best travel option to suit their ability and needs. FACT meets the gaps identified by SANDAG in the regional transportation networks by operating a demand response service named RideFACT. RideFACT is primarily for seniors and people with disabilities due to the scope of the available funding. When possible, rides are offered to other demographic groups who are faced with mobility barriers – veterans, low-income individuals, students, and others. FACT also operates fee based contracted agency transportation services for municipal agencies, hospitals and other organizations that need cost effective transportation for clients. On June 1, 2023, FACT launched an on-demand accessible transportation service called RideFACTNow for persons with disabilities who are unable to use Transportation Network Companies (TNC) due to the lack of Wheelchair Accessible Vehicles (WAVs).

1.3 Service Highlights

The chart below provides a snapshot of FACT services and their development during the last 3 Fiscal Years (FY).

Fiscal Year Overview of FACT Services

Legend: ■ Referrals to Other Services ■ Web Hits ■ Total One-Way Trips
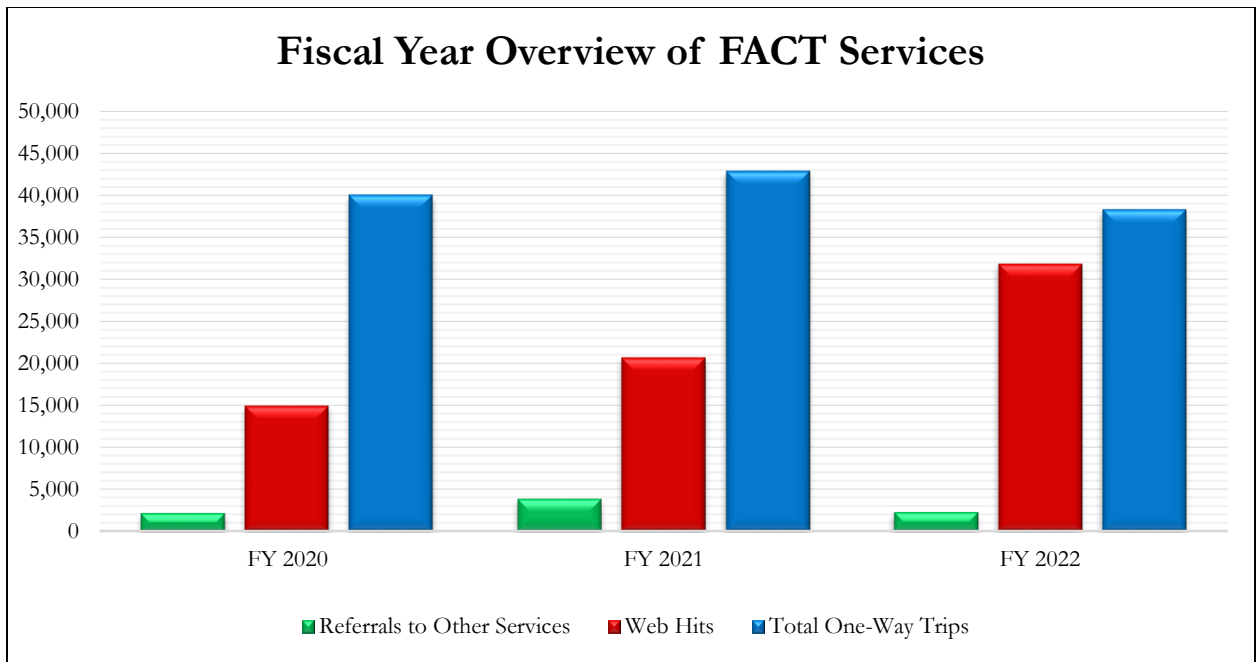
1.4 Governance

FACT is governed by a Board of Directors which seats up to eleven (11) regular as well as two (2) emeritus Board members. Currently the Board has nine (9) members; including one member who is appointed from the SANDAG Transportation Committee.

The Board appoints FACT's Executive Director, who administers the agency and reports to the Board. The Council on Access and Mobility (CAM) is an advisory committee to the FACT Board. The Board also appoints other advisory committees, such as the Finance Committee and Service Development Committee to handle specific matters. Figure 1.1 shows FACT's organization structure.

FIGURE 1.1 - FACT ORGANIZATION
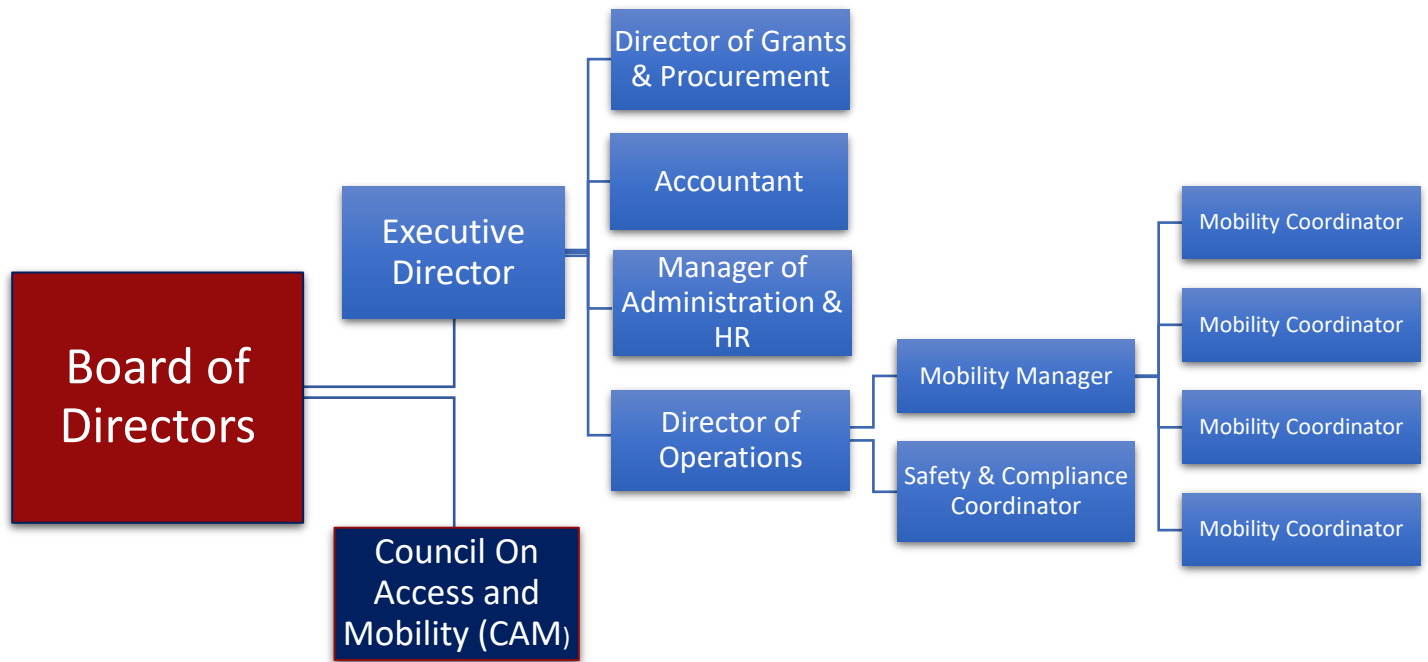
A) Board of Directors:

- Susan Hafner: *Board Chair* — Principal, Multimodal Solutions
- Hon. George Gastil: *Board Vice Chair* — City Councilmember, City of Lemon Grove
- Hon. Phil Monroe: *Board Treasurer* — former City Councilmember, City of Coronado
- LaVonna Connelly: *Board Secretary* — Service Coordination, The Salvation Army Silvercrest Senior Residence
- Hon. Bob Campbell (Emeritus) — former Councilmember, City of Vista
- Hon. Jewel Edson — City Councilmember, City of Solana Beach
- Hon. Kellie Hinze – City Councilmember, City of Encinitas
- Hon. Dave Roberts — former County Board Supervisor, District 3
- Hon. Corinna Contreras — City Councilmember, City of Vista

FACT Board of Director's meetings are held on the fourth Thursday of each month.

B) Council on Access and Mobility (CAM)

CAM's Mission is to *"Promote coordination of transportation resources and services in San Diego County".*

CAM represents a cross section of transportation interests in San Diego County. CAM's membership includes Government Agencies & Public Transit providers, Non-Profit Specialized Transportation providers, Private Sector Transportation providers & Consultants, Faith Based providers, Hospitals & Medical Center Transportation providers, and Rural Transportation representatives. Riders and other members of the public participate in meetings regularly. CAM typically meets on the second Tuesday of each month. There is a recent proposal from the Board which recommends the CAM Chair attend Board Meetings as an ex-officio member.

C) Staff

FACT is managed by the Executive Director who is responsible for FACT's programs, developing partnerships with other agencies, overseeing staff, and planning meetings of the FACT Board. The Executive Director manages a 10-member team including the Director of Operations, Director of Grants and Procurement, Manager of Administration & HR, Mobility Manager, Safety & Compliance Coordinator, 4 Mobility Coordinators, and a part-time Accountant.

Chapter 2: Specialized Transportation Needs

2.1 Regional Transportation Needs

FACT participates in SANDAG meetings, workshops, and surveys as well as provides input to the Regional Short-Range Transit Plan & Coordinated Public Transit-Human Services Transportation Plan (Coordinated Plan). The Coordinated Plan provides a five-year implementation plan for public transit and specialized transportation. It establishes a regional strategy to provide transportation to recognized transportation-disadvantaged groups, including seniors, individuals with disabilities, and persons with limited means. The plan also combines the regional requirement for a Short-Range Transit Plan with the federal requirement for a Coordinated Plan into one planning document. The Coordinated Plan includes priorities for funding and implementation related to federal and local grants available for specialized transportation projects.

On July 17, 2020, the SANDAG Transportation Committee adopted the Final 2020 Coordinated Plan. The Plan identified unmet transportation needs for urban, suburban, and rural areas of San Diego County. It evaluated existing transportation services, public, private, and social service providers, and prioritized strategies to provide transportation to sensitive population groups including individuals with disabilities, seniors, low-income individuals, and veterans. The following is a summary of the transportation needs.[1]

- **Individuals with Disabilities —** Individuals with disabilities are identified as any persons with physical, developmental, behavioral, mental, visual, and/or hearing impairments. According to the 2018 American Community Survey (ACS) 1-year Estimates, 9.8% of the residents within the San Diego region have a disability. The transportation needs vary based on each individual's impairment. In all cases, however, access to transportation is a necessity for individuals with disabilities to fulfill basic daily needs; access healthcare, education, and work; and maintain their mental and physical well-being. Individuals with disabilities often are at a disadvantage in that their impairment may impede their placement in the workforce as well as access to further education. This leads to higher rates of unemployment, undereducation, and poverty among individuals with disabilities. Providing appropriate transportation options, including paratransit to access medical, social, and work/education-related destinations is critical in addressing the needs of a population that most likely is either transit-dependent or reliant on other specialized transportation programs. Considerations for providing specialized transportation to individuals with disabilities include, but are not limited to, accommodations for mobility devices (e.g., wheelchairs, canes, scooters), service animals, and Personal Care Attendants; assistance with ride scheduling; sensitivity to long waits/long travel schedules and adverse weather conditions (as it may relate to medical conditions); and protective infrastructure.

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[1] *2020 Coordinated Plan. Chapter 4 "An Assessment of Transportation Needs"*

- **Seniors —** According to SANDAG estimates, seniors ages 65 years or older comprise 14.43% of the total population in San Diego, while those 85 and older make up 1.98% of the entire population and represent 12% of the senior population (ages 65 and older). Based on SANDAG Forecast data, the number of seniors ages 65 and older is expected to increase by more than double by 2050. The number of Seniors ages 85 and older is anticipated to nearly quadruple by 2050. Transportation needs of seniors include both emergency and non-emergency medical, nutrition-based, social (visiting family, seeing a play, etc.), and civic (volunteering, attending religious or community events, etc.) trips. Specific transportation needs for seniors, such as type and level of service, vary by individual.

- **Low-income Individuals —** Persons living at or below 200% of the poverty line are recognized as low-income. According to the 2018 ACS 1-year Estimates, 27.32% of San Diego County residents are low-income. One of the biggest challenges for low-income individuals is limited access to transportation. They often do not have access to a vehicle and/or rely on public transportation to meet their travel needs. Without adequate public transit, low-income individuals often spend disproportionate amounts of time and money to access education, jobs, and recreation, which can prevent them from climbing out of poverty. Low-income individuals require greater regional connectivity to ensure access to employment throughout the county.

- **Veterans –** San Diego County is home to over 208,000 veterans. Veterans may require access to healthcare, rehabilitative services, other independent living services, and job-related trainings. Veteran transportation programs should consider flexible and resource-efficient programs that meet the needs of this population.

2.2 Existing Transportation Services

San Diego County has public transit 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, complementary ADA Paratransit, light rail, and commuter rail services: the Coaster and Sprinter. Private and social service transportation providers also serve seniors, people with disabilities and persons with limited means through various programs, including volunteer driver programs, the traditional directly operated van services as well as subsidized taxi services. For a comprehensive list please refer to FACT's database of transportation programs at www.factsd.org.

2.3 Regional Transportation "Gaps"

The Coordinated Plan outlines regional transportation "gaps" for people with disabilities, persons with limited means and seniors[2]. These gaps reflect geographic areas lacking adequate public, private and social service transportation. Gaps were identified in the following cities/regions:

• Bonita	• La Mesa	• San Carlos
• Carlsbad	• Linda Vista	• San Marcos
• Carmel Mountain	• Mira Mesa	• Santee
• Carmel Valley	• Oceanside	• Scripps Ranch
• Chula Vista	• Otay Mesa	• Sorrento Valley
• Clairemont Mesa	• Otay Ranch	• South El Cajon
• Del Mar	• Poway	• Spring Valley
• El Cajon	• Ramona	• Tierrasanta
• Encinitas	• Rancho Bernardo	• Tri-City
• Kearny Mesa	• Rancho Penasquitos	• Vista
• La Jolla	• Rancho San Diego	• University City
• Lakeside	• Sabre Springs	

These gap areas have significant impacts on sensitive populations who are often dependent on transit for regional services. An overriding need in San Diego County is for regional and intercity transportation options, particularly for seniors and other transportation disadvantaged groups. Many suburban and rural sections of San Diego do not have conveniently located transit options. The taxicab type services are very limited or nonexistent in communities like Ramona and Fallbrook and very few offer WAV services. Since most transit and on-demand services are more readily available in densely populated regions of the County, it is expensive to serve the mobility needs in the gap areas. Other gaps pertain to limited or no availability of affordable services on weekends, during late hours and in real time (on-demand). FACT's services are aimed at closing these gaps.

2.4 Social Equity

A major part of SANDAG's 2021 Regional Plan framework focuses on improving Social Equity in San Diego County. "Social equity" is a shorthand term SANDAG uses for an overarching goal that combines the concepts of environmental justice, the federal laws in Title VI of the Civil Rights Act, and various other federal and state laws intended to promote an equitable distribution of the benefits and burdens resulting from SANDAG policies, programs, and projects." SANDAG is working toward a transportation system that will improve air quality and provide access to basic needs, opportunities, and quality healthcare for our most underserved populations, including people of color, people of limited incomes, and seniors. SANDAG has highlighted the importance of diversity and inclusion in the planning and decision-making process, meaningful data collection, and that strategies are measurable to ensure outcomes are beneficial.

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[2] *2020 Coordinated Plan. Chapter 5 "Strategies and Projects to Address Transportation Gaps"*

This initiative coincides with FACT's mission. FACT follows all federal and state laws and as a subrecipient of FTA funds is required to have an ADA and Title VI Plan. (See Appendix 3 – Website Links for FACT's ADA and Title VI plan). Social equity takes it a step further by including seniors, people of limited income, and those living in areas disproportionally impacted by poor air quality. The Biden-Harris Administration created the Justice40 Initiative to confront and address decades of underinvestment in disadvantaged communities. The initiative will bring resources to communities most impacted by climate change, pollution, and environmental hazards. Grant applications for federal funding have incorporated questions and requirements regarding how proposed projects will serve Jusitce40 communities.

FACT is dedicated to improving equity and access in San Diego County's transportation system. This includes reducing FACT's carbon footprint by investing in low or zero-emission vehicles.

2.5 Closing Regional Transportation "Gaps"

Filling the gaps in transportation is identified as a high-level priority in SANDAG's Coordinated Plan. FACT addressed this regional issue by creating a transportation brokerage comprising local taxicab services, including some non-profit and TNC transportation providers. The brokerage created a readily available pool of services that are geographically diverse and can now serve any area of

> *FACT's priority is to coordinate with existing transportation services to serve areas that represent gaps in current services.*

the County cost effectively with real-time, or prearranged trips. The brokerage and supporting infrastructure created by FACT has made it possible to serve any community in the County, as well as scale the available transportation services according to the level of demand in any community. FACT is working with SANDAG and with various Cities and organizations to fund increased levels of services for residents in the gap areas.

FACT's grant funded vehicles have increased the WAV capacity to meet the needs of individuals with mobility challenges. Since inception FACT has shared 61 WAVs with brokerage vendors and regional partners to meet the demand throughout the county. The brokerage and vehicle sharing program has allowed FACT to close these gaps through in-house services like RideFACT and contracted services throughout the region.

Due to the shortage of accessible vehicles available through TNC services, such as LYFT and UBER, The California Public Utilities Commission (CPUC or Commission) created the TNC Access for All Program to implement Senate Bill (SB) 1376 (Hill: 2018), which directed the Commission to establish a program relating to the accessibility of TNC services for persons with disabilities, including wheelchair users who need a wheelchair accessible vehicle (WAV). FACT was awarded funding through this program to establish an on-demand WAV service. See section 3.3 for more information on this and other FACT services that help close gaps in our region's transportation system.

Chapter 3: FACT Services and Programs

3.1 Consolidated Transportation Services Agency (CTSA) for San Diego County

During FY 2018-19 FACT and SANDAG worked together to update the CTSA Services Agreement, including revising the scope and definition of CTSA services and adding deliverables/performance measures. The Annual Work Plan identifies the activities and includes a budget that conforms to FACT's TDA apportionment **(CTSA Work Plan, Appendix 1).**

The CTSA mandate includes coordination of services for low-income individuals, youth, and veterans, as well as other transportation disadvantaged populations, including persons with disabilities and seniors.

The updated CTSA Services Agreement prioritizes FACT's services that are recognized as CTSA activities as either Core, or other services. TDA funds may be used for "Other" services, including transportation after the Core service needs are met.

3.2 Core CTSA Services

A) Transportation Provider Database Management

FACT maintains a database of public, private, and social service transportation services available in San Diego County. FACT manages the database by updating provider information and incorporating new services. The database includes 184 transportation services; these include public, private, social service, and volunteer driver transportation programs. (**Link to List of Providers, Appendix 3**).

B) Telephone and Web Referrals

FACT's database of transportation providers can be accessed by visiting www.factsd.org. FACT's website features an online trip planner that identifies services based on the riders' trip specifications. FACT staff use the database to provide toll-free telephone referrals that match the appropriate transportation service with the specific needs of the customer. FACT continues to update the website to improve the functionality, appearance, and search visibility/site traffic.

FACT joined 2-1-1 San Diego's Community Information Exchange (CIE) in April 2020. The CIE is an ecosystem comprised of multidisciplinary network partners that use a shared language, a resource database, and an integrated technology platform to deliver enhanced community care planning. Care planning tools enable partners to integrate data from multiple sources and make bi-directional referrals to create a shared longitudinal record.

C) Maintain an Active Council on Access and Mobility (CAM)

As the CTSA, FACT manages an advisory council that serves as a forum for regional mobility and networking. The Council on Access and Mobility (CAM) meets monthly and covers a diverse range of agenda items during meetings:

- Legislative updates
- Transportation services
- Funding opportunities
- Service gaps
- Technical training
- Coordination opportunities
- CTSA services
- Emergency planning/response

D) Additional CTSA Mobility Management Activities

There are new tasks and projects associated with FACT's SANDAG STGP Cycle 11 STGP and 5310 funding allocation beginning in April 2022 and FACT's Cycle 12 5310 available following Cycle 11. These tasks build on FACT's current Mobility Management activities and add performance measures associated with FACT's allocation. Tasks include:

- Draft a regional plan on how to track referral outcomes
- Surveys: Customer (Referrals and Trips) and Technical Grant Assistants
- Provide a written summary of all Regional Representation and Coordination events (E.g., conferences, trainings)
- Assist SANDAG with outreach and planning regarding Shared Technology Platform Coordination
- Regional Research Services: Report on uniform Code of Conduct efforts and plan
- Monthly reporting on Brokerage, Referrals, Contracted Services, and Vehicle sharing program

3.3 FACT Transportation Services

FACT's transportation services have played a vital role in closing regional transportation "gaps" identified in SANDAG's Coordinated Plan, discussed in Chapter 2. FACT's subsidized RideFACT dial-a-ride service and contracted agency services have provided trips for people with disabilities, seniors, and persons with limited means in these geographic areas lacking adequate public, private and social service transportation.

FACT entered into an agreement for operations and call-center support with the non-profit agency Charitable Adult Rides & Services (CARS) in January 2020. CARS answers phones when FACT transportation services are operating outside of normal business hours or when all FACT agents are on the line with other callers. CARS service acts as back-up to FACT's call-center and CARS staff can respond to FACT's phone calls effectively and seamlessly.

A) Transportation Brokerage

In December 2011, FACT's Board of Directors approved the implementation of a unique in-house 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, social services transportation providers, and transportation network companies (TNC's). The brokerage model promotes sustainable, cost-effective transportation in all San Diego County. FACT uses the Brokerage to purchase trips for the RideFACT program and for contracted agency services. The Brokerage has service providers who are geographically dispersed and effectively cover all eighteen cities as well as numerous unincorporated and rural communities. FACT continues to encourage new vendors to join the brokerage to expand service capacity and maintain competitive rates. Inclusion of nonprofit vendors and FACT owned vehicles in the Brokerage has helped to reduce transportation expenses.

FACT has provided 300,000+ one-way trips through the Transportation Brokerage

FACT uses Ecolane software to dispatch rides to brokerage vendors. Vendors have access to an online portal to review trip requests and report service data. The software assists with trip scheduling, dispatching, tracking, invoicing, and reporting.

B) RideFACT

RideFACT is a dial-a-ride service for those seniors and persons with disabilities who have limited transportation options. RideFACT is predominantly funded by SANDAG's Specialized Transportation Grant Program (STGP). It is a shared ride service available 7 days a week from 7am – 8pm for any trip purpose. Reservations can be made Monday – Friday from 8am to 4pm. Riders pay a mileage-based fare between $2.50 and $10 per one-way trip. RideFACT is the only subsidized specialized transportation operating throughout San Diego County.

FIGURE 3-1 illustrates FACT's referral process. When no other services are available, FACT offers its RideFACT transportation service.

C) RideFACTNOW

RideFACTNOW implemented on June 1, 2023, is an on-demand Wheelchair Accessible Service (WAV) designed for individuals who are unable to access TNC services due to lack of accessible vehicles. The service is funded by SANDAG's Access For All (AFA) program. The goal of the AFA is to improve on-demand mobility for individuals with disabilities, including wheelchair users needing a wheelchair-accessible vehicle (WAV) in the region by meeting their accessibility needs through the expansion of service options and removal of existing barriers. The California Public Utilities Commission created the TNC Access for All Program to implement Senate Bill (SB) 1376 (Hill: 2018) which directed the Commission to establish a program relating to accessibility for persons with disabilities, including wheelchair users who need a wheelchair accessible vehicle (WAV).

The project includes service development such as purchasing vehicles, implementing a mobile booking app, marketing with an expert consultant, extending back up call center hours, hiring additional staff, establishing new contracting arrangements (e.g., Standby vehicles), and preparing for new program requirements. FACT contracted with Brokerage Vendors to provide Standby Vehicle Services at a daily rate as well as under per trips rate for any overflow not covered by the Standby Vehicles. Standby Vehicles are stationed throughout the county to ensure there is adequate coverage to respond to on-demand trip requests countywide. FACT will offer free transportation to kick off the service and then introduce a fare; $10 one-way, flat fare.

FIGURE 3-1 FACT TRANSPORTATION SERVICES MODEL
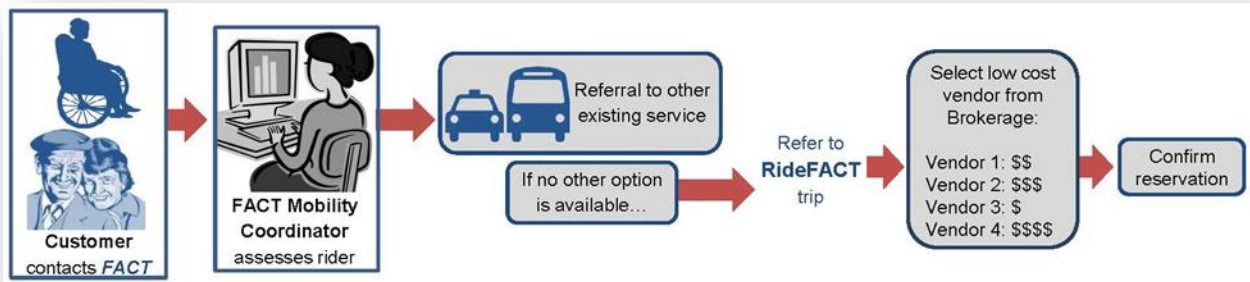
3.4 Contracted Agency Transportation Services

The services FACT provides as a contractor for Cities and agencies have helped reduce gaps in services in areas that were underserved. These services have improved mobility for seniors and people with disabilities and improved access to healthcare.

In 2019 Circulate San Diego prepared a report, "Leveraging FACT"- based on FACT's impact on mobility in San Diego County". According to the report, "By providing more rides with limited funding through the brokerage, as well as promoting consistent prices and policies across jurisdictions, local jurisdictions, hospitals, and even the private sector could benefit from cost effectively serving the growing senior population and people with disabilities."

A) ADA Paratransit Services: NCTD LIFT and MTS Access

ADA paratransit service required as per Americans with Disabilities Act (ADA) for persons with disabilities, for travel within the service area covered by the bus and rail services offered by North County Transit District (NCTD) and Metropolitan Transit System (MTS).

Beginning March 2014, FACT has provided trips for North County Transit Districts (NCTD) LIFT program as a subcontractor. This agreement has been inactive since November 2018. FACT has continued discussions with NCTD to begin a new same day pilot service for LIFT. In June 2023, FACT signed an agreement to provide same day transportation for NCTD clients through a 1-year pilot program. Riders who are eligible for NCTD LIFT may opt into the program. Trips up to 5 miles will

be subsidized and a $5 copay will be paid by the rider, trips longer than 5 miles will require a self-pay $5 per mile fee. Eligible riders will contact FACT's call center directly to request trips. In May 2023 FACT entered into an agreement with Metropolitan Transit District (MTS) to provide next day transportation for eligible MTS Access riders during their subcontractor driver strike. FACT will continue to work with MTS and NCTD to provide support services for ADA paratransit riders.

B) Tri-City Medical Center (TCMC)

FACT began providing on-demand rides for Tri-City patients in December 2016. FACT assists patients traveling from the hospital to their homes or to other medical facilities. Additional post-discharge transportation to pharmacies and treatments is also provided. FACT has provided 7,169 trips for Tri-City patients between December 2016 – January 2023.

C) The City of San Marcos

The City of San Marcos's Catch a Ride! Program provides transportation for eligible seniors 60+ within San Marcos city limits as well as for medical purposes outside of the city within a 20-mile radius. FACT has provided 7,555 trips between February 2018 – January 2023. FACT and the City recently signed Amendment 5 to extend the contract through June 2023 and added weekday lunch transportation to the agreement.

D) County of San Diego HHSA

This service provides trips for the County to non-contagious Tuberculosis patients from their residences to clinics for treatment. 891 trips have been performed under this contract between late November 2018 through January 2023. This contract term is through December 31, 2023. FACT provided emergency same day transportation to riders and pets during the Border 32 Fire on September 2nd. An amendment to the current contract was enacted to respond to the same day trip requests under special circumstances.

E) Scripps Health

FACT's service agreement with Scripps Health began January 15, 2020; 2,858 trips were provided through January 2023. FACT brokerage vendors are transporting discharged patients to pharmacies, their residences and/or to hospitals outside of San Diego County. FACT currently provides trips for 6 locations, Scripps Mercy Hospital Hillcrest and Chula Vista, Scripps La Jolla, Scripps Green, Scripps Acute Care Clinic and Scripps Vista Clinic. FACT signed a contract amendment expanding locations in August 2021.

F) City of Escondido

FACT provides transportation to/from the City of Escondido's senior lunch nutrition program Monday-Friday. Service began November 1, 2019. Trips were paused in mid-March 2020-May 2021 due to COVID-19. Service resumed on June 15th. FACT provided 19,193 trips between November 2019 and January 2023. This contract term was renewed through June 2023 with up to 3 renewal periods.

G) The Parkinson's Association of San Diego

The Parkinson's Association of San Diego (PASD) contracts with FACT to provide transportation for neurological medical appointments, support groups and Parkinson's Association related events for their clients.   Between June 2018 – January 2023, 251 trips have been provided. The program ended in March 2023 due to low ridership and a higher per trip cost.

H) 2-1-1 Cool Zones Transportation

211 reached out to FACT in 2021 to provide transportation for persons to/from Cool Zones established by the County of San Diego for relief from heat during the summer-early fall months. FACT was asked to receive direct referrals for this program through 211's Community Information Exchange (CIE) platform. A formal contract was signed in June 2022; FACT completed 20 trips since June.

I) SDG&E Public Safety Power Shutoffs (PSPS) Transportation

Trips for special needs clients affected by PSPS events are requested via the Community Information Exchange (CIE) portal through 211. A handful of trips have been provided to date under this contract. FACT was recently contacted to expand transportation service for planned and unplanned power shutoffs.

J) UCSD Shiley-Marcos Alzheimer's Disease Research Center

In summer 2022 staff from UCSD reached out via the FACT website regarding a need for patient transportation for participants of ongoing Alzheimer's clinical trials. The purchase order was completed in November and the trips began in January 2023; 4 trips were completed in the first month.

K) 2-1-1 & UCSD Health Pilot

FACT will participate in a 90-day pilot program to provide transportation for UCSD Health patients to primary care follow up appointments. Trips will focus on the Hillcrest and La Jolla medical campus areas. FACT will receive trip requests through 211's Community Information Exchange (CIE) platform and provide trip outcomes within the software. This service is expected to begin in the summer of 2023.

L) Past Agency Services Contracts: [3]

- Poway Adult Day Health Care Center
- Foster Youth Student Transportation (County Office of Education)
- Braille Institute
- ElderHelp Seniors-A-Go-Go Program
- St. Paul's P.A.C.E
- County of SD COVID-19 Transport
- The City of Oceanside Senior Transportation Van Service
- Gary Mary WestPACE

3.5 Grant Project Partnerships

FACT will continue to pursue grant project partnerships to secure additional funding and access grant funding not available to FACT as a subrecipient. FACT is not a direct recipient of FTA funds which limits its eligibility to apply for most FTA grants. FACT has partnered with direct recipients, such as SANDAG and Caltrans to submit applications. FACT has also partnered with other agencies, such as 2-1-1 and Tri-City Medical Center to apply for funding. In 2020 FACT partnered with NCTD, ARS, Vista Community Clinic, and Universidad Popular to apply for Sustainable Transportation Equity Project (STEP) funding, but the project was not awarded.

Past Grant Partnership Contracts

- VTCLI Grant Project
- Rides to Wellness Grant Project

3.6 Grant Funded Vehicles

FACT has been successful in acquiring funding to purchase wheelchair accessible vehicles (capital) through Caltrans's FTA Section 5310 and 5339 programs and SANDAG's STGP (TransNet SMG and FTA 5310) program. San Diego County has 2 wheelchair accessible private taxicabs, as per MTS taxicab administration. FACT has helped to increase the availability of accessible services using these vehicles.

A) Vehicle Sharing Program

FACT leases vehicles to taxicab services providers in its Brokerage who provide trips for FACT in exchange for the use of the vehicle. FACT also shares vehicles with non-profit and municipal agencies who serve seniors and individuals with disabilities. As of March 29, 2023, FACT's vehicle fleet includes 6 minivans and 2 bus cutaways. FACT has shared use agreements in place with 5 different agencies who operate and maintain the vehicles. Since inceptions FACT has shared 61 grant funded vehicles with partners.

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[3] See Business Plan 2021-2026 and prior plans for details.

B) Recently Awarded Vehicles and Funding Requests

FACT partnered with Caltrans to submit an FTA 5339 (b) application for cycles FY 2018 and FY 2019. FACT's FY 2018 project was awarded $312,027 and its FY 2019 project was awarded $466,883. Caltrans will purchase the vehicles on behalf of FACT through a state purchasing contract. FACT plans to purchase 10 to 12 vehicles depending on vehicle models and prices available on the State contract.

FACT hosted a Vehicle Sharing and Insurance Workshops to discuss the details of FACT's vehicles and vehicle sharing program in addition to insurance issues such as cost and policy constraints that prevent vehicle sharing amongst agencies. FACT will issue a Request for Proposals (RFP) to share the new vehicles and schedule a follow-up workshop once a clear timeline is established.

FACT will continue to apply for expansion or replacement vehicles as needed through Federal Transit Administration (FTA), Caltrans, SANDAG, and other grant programs.

C) Vehicle Safety Program

FACT hires a consultant to physically inspect all grant funded vehicles and all other vehicles used in FACT services annually. Vehicles funded by Caltrans and SANDAG are also inspected approximately every three years by the corresponding agency staff. FACT staff works with vendors to rectify any reported issues. In December 2021, FACT hired a Safety and Compliance Coordinator whose duties include, but are not limited to inspecting vehicles, maintaining vehicle and driver records, and ensuring FACT's vehicles are being operated safely.

D) Vehicle Retirement

Vehicles can be retired based on FTA's useful life standards. When a vehicle is retired FACT either continues to share the vehicle with brokerage vendors or community partners under an MOU, donates the vehicle to a local non-profit, or sells the vehicle for market value. FACT attempts to dispose of retired vehicles with high mileage to coincide with delivery timeframe of the new replacement vehicles and to avoid expensive repairs. In each scenario the vehicles continue to serve San Diego County residents with accessible transportation well beyond FTA useful life standards.

E) Fleet Transition Plan - Electric and Alternative Fuel Vehicles

Industry trends and regulations are pushing transit agencies to replace retired gasoline powered vehicles with electric and alternative fuel vehicles. FACT's recent Caltrans awarded project to purchase vehicles was for gasoline powered vehicles, but grant applications are increasingly promoting and prioritizing projects that reduce greenhouse gas emissions. Many FTA Programs are focused on modernizing bus fleets and bus facilities across the country, including helping transit agencies purchase or lease low- or no- emission vehicles that use advanced technologies to help improve air quality and combat climate change.

Due to charging and fueling barriers for battery electric and alternative fuel vehicles, fast evolving technology, reliance on public charging stations, and limited small accessible vehicle options for

specialized transportation, FACT is cautiously transitioning to battery electric vans, but has a plan to be fully electric by 2035. FACT applied for 10 battery electric accessible vans in April 2023 through FTA's 5339 program. If awarded FACT's Zero Emissions project will begin this transition.

3.7 Coordinated Outreach

FACT works with numerous transportation affiliated groups and is a member of the San Diego County Volunteer Driver Coalition, Alliance for Regional Solutions (ARS), Women in Transportation Seminar (WTS), Circulate San Diego, and SANDAG committees. FACT is also a member of the American Public Transportation Association (APTA) and the California Association for Coordinated Transportation (CalACT). FACT staff participates in Metropolitan Transit System (MTS) and North County Transit Districts (NCTD) ADA review meetings. Staff attends City Council Meetings, County Board of Supervisor Meetings, and other regional planning meetings as needed.

Since 2013, FACT has been a partner organization in the County of San Diego's Live Well Program. In early 2020 FACT joined the web-based Community Information Exchange (CIE) managed by 2-1-1 of San Diego, which allows FACT to coordinate and exchange data seamlessly with all CIE members in San Diego who are mostly social services providers, including 2-1-1. Meagan serves as Chair of SANDAG's Social Services Transportation Advisory Council (SSTAC). In 2023 Arun was appointed to the Mobility Working Group (MWG), a subcommittee of the SANDAG Transportation Committee (TC)

Chapter 4: Potential Services and Programs

FACT will continue to pursue partnership opportunities that will improve connectivity and accessibility, consolidate resources, help with sustaining essential services to meet regional needs, and generate additional revenues.

FACT is in the process of reaching out to all medical service providers, Cities and agencies that need transportation to assist clients. These transportation services are priced based on the brokerage rates available to FACT and in general a markup is applied to the cost to account for expenses.

4.1 SANDAG's 5 Big Moves and Flexible Fleets

SANDAG's Transportation Vision - the 5 Big Moves includes the following: Complete Corridors, Transit Leap, Mobility Hubs, Flexible Fleets, and the Next OS. Due to the nature of FACT's Brokerage, FACT is positioned to provide most services included under Flexible fleets. SANDAG considers the following features as Flexible Fleets:

- **Micromobility**: FACT's brokerage has a variety of vehicle types and could accommodate microtransit in future.

- **Rideshare**: Current services offered by FACT use shared rides and our contracts promote ridesharing due to price and fare-based incentives.

- **Microtransit**: FACT has had preliminary discussions with NCTD and City of Encinitas regarding proposed microtransit services and has the capacity and management skills needed for these operations. FACT has experience with operating shuttle services for agency clients.

- **Ridehailing**: One of FACT's priorities is to introduce a ridehailing/booking app into the service mix.

- **Last Mile Delivery**: A brokerage based last mile service is a cost effective and efficient way to address this connectivity with fixed route or rail.

FACT plans to develop its brokerage and services to support SANDAG's vision of Flexible Fleets including but not limited to embracing new technology, developing real-time services, and accommodating regular multi-passenger shuttle services. In 2022 FACT partnered with private

companies to respond to a SANDAG RPF for a bench contract to provide services including microtransit and ride hailing. The proposal was selected. Implementation is awaiting.

4.2 Integrated and Shared Technology

One of the 5 Big Moves is Next OS, the digital platform that will help transform the San Diego region's current transportation system into a world-class network. A digital platform is not a single piece of technology, but rather a set of multiple technologies that are connected to create information-sharing opportunities for businesses and public agencies and better outcomes and value for users. At minimum, a digital platform often includes data management, analytics, communication, and engagement.

FACT is a partner in 2-1-1 San Diego's Community Information Exchange (CIE) and will continue to coordinate with 2-1-1 to integrate new technologies with the CIE. A CIE is an ecosystem comprised of multidisciplinary network partners that use a shared language, a resource database, and an integrated technology platform to deliver enhanced community care planning. Care planning tools enable partners to integrate data from multiple sources and make bi-directional referrals to create a shared longitudinal record. By focusing on these core components, a CIE enables communities to shift away from a reactive approach to providing care toward proactive, holistic, person-centered care.

In early 2022 FACT teamed up with Caltrans' California Integrated Travel Project (CAL ITP), Visa, Felix, and Brokerage Vendors to pilot a contactless card fare collection system. The program allows riders to pay fares via Visa or Mastercard through Payment Acceptance Devices (mobile phone). Open-loop payments allow people to instantly pay for transit by tapping their contactless bank card or smart device on a Payment Acceptance Device (PAD). FACT provided mobile phones free of charge for the pilot, which were used by brokerage vendors to accept rider payments. The pilot began mid-2022 and conclude by the end of the year. FACT staff reviewed the progress for this project at the 6 months mark. There was involved troubleshooting and feedback provided to Felix from the Operations Team regarding the use of the technology and vendors were not able to obtain completed transactions. Due to this as well as limited funding due to the sharp increase of inflation on trip costs latest updates on funding, low-rider count and more generally the customer-base that FACT works with, many of whom did not have contactless credit card capabilities, the partners decided to end the project.

In June 2022 FACT was awarded an FTA Innovative Coordinated Access and Mobility (ICAM) grant through Caltrans to fund research and development of a mobile application (app) that will allow riders to schedule trips and pay fares contactless through a card-based payment solution. The app will share trip requests and client information between specialized transportation programs to ensure riders get immediate service and are using the best service for their needs. The app will interface with Ecolane, Community Information Exchange (CIE), and other systems. This will enhance operations by enabling applications to exchange data and functionality easily and securely. The project will be launched after the completion of the grant agreement. In late 2022 FACT was awarded Access For All (AFA) program funding, which includes a budget for developing and

implementing the mobile booking app, software integration, and vehicle equipment (e.g., cameras, GPS).

4.3 Access for All (AFA) Cycles

SANDAG issued a call for projects in late March 2022 for the first call for projects under the AFA grant program. FACT was the only applicant who qualified for this competitive grant. FACT was awarded the full amount available for Cycle 1 for its on-demand WAV service, RideFACTNOW. SANDAG is working on the Cycle 2 call for projects. The budget included funding for administration, operations, and capital purchases.

FACT plans on applying for Cycle 2 funding to leverage the progress of Cycle 1 and further develop RideFACTNOW. FACT staff participated in SANDAG workshops and surveys to help guide the Cycle 2 criteria. To plan for and support the demand for on-demand WAV services effectively, FACT and SANDAG are engaged in discussions regarding streamlining AFA funding and making the process more predictable and consistent from funding cycle to cycle.

4.4 Expanded Services for Rural and Underserved Areas

Using SANDAG's Coordinated Plan data FACT will continue to help serve identified areas lacking adequate public, private and social service transportation. Rural communities face challenges in accessing safe, affordable, and reliable methods of transportation. The main barriers to transportation in rural areas include Distance and low Population Density. Lower population density in rural areas often leads to lower ridership for fixed transit routes and a smaller tax base to fund maintenance and repair of transportation systems. Rent and home prices have pushed many residents further into rural areas further away from public transit routes and ADA services.

Serving rural area communities efficiently is challenging due to the sparse demand and distance in relation to Brokerage vendors' locations and deadhead miles involved, resulting in a high cost per trip. Due to the challenges of providing transportation in rural areas, there are no low-cost services and very few services in general serving these communities. As a result, income is a barrier to accessing affordable transportation in rural 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 have continued to expand serving additional areas including Fallbrook, Bonsall, Camp Pendleton, and Lakeside, as well as the nonurban (rural) areas of Valley Center, Rainbow, Alpine, and Jamul.

SANDAG administers the FTA 5310 Urban funding and Caltrans administers the FTA 5310 Rural funding for San Diego County. To serve rural areas, FACT applies for 5310 funding through Caltrans. FACT also applies for FTA 5310 funding and FTA 5339 (b) funding to replace retired vehicles and expand its vehicle fleet to serve rural areas. FACT will continue to develop the brokerage, coordinate with rural area communities, and pursue other funding sources to better serve rural communities.

4.5 Technical Assistance Workshops

FACT will continue to host workshops and regional mobility forums. The workshops will assist specialized services operators and stakeholders in planning for the transportation needs in the region. Staff collects CAM member feedback and develops a list of workshop topics prioritized according to the feedback. Most CAM meetings include a speaker/s who provide training and education related to mobility.

4.6 Medical Transportation Coordination

Transportation for healthcare has played a major role in FACT's operations. In FY 2022 66% of trips were provided for medical purposes.

FACT has been working with healthcare providers, hospitals, and dialysis centers to engage them in the process of coordinating services to reduce their expenses and optimize the impacts of their services for customers. The medical transportation services predominantly assist seniors and persons with disabilities. FACT service contracts are discussed in detail in section 3.4. Partnerships include Tri-City Medical Center, UCSD, Scripps Health, County of San Diego, Parkinson's Association of San Diego, and others. During the COVID-19 pandemic FACT temporarily offered free transportation to all essential workers including those in medical field. FACT was awarded funding from the American Cancer Society (ACS) to provide transportation for individuals traveling to cancer related appointments. FACT will continue to pursue grants and contracting opportunities that support access to healthcare.

FACT was approved to claim reimbursement for Medi-Cal Administrative Activities (MAA) for arranging and providing Non-Emergency Medical Transportation (NEMT) and Non-Medical Transportation (NMT) to Medi-Cal covered service facilities. Due to changes in State law reimbursement is no longer feasible.

4.7 Emergency Transportation Coordination

A) Coordination with OES

FACT has been collaborating with the County Office of Emergency Services (OES) to assist with emergency response transportation. Staff participates in OES's monthly Access and Functional Needs (AFN) Working Group. FACT created a working document to develop an inventory of agency vehicles in San Diego County that could possibly be utilized for emergency response transportation. FACT submitted a bid in mid-July 2022 in response to OES's RFP for As-Needed Emergency Transportation Services. The bid was unsuccessful.

B) Pandemic Response

In late 2019 and early 2020 the Novel Coronavirus (COVID-19) pandemic changed the way San Diego County operated services. Shelter in place, social distancing, and essential business orders issued by the government resulted in a decrease in trip demand for RideFACT passenger and contracted services but created a need for non-traditional services such as grocery and food delivery. Due to the unprecedented circumstances, there was very little preparation and planning in place. The outbreak also led to a shortage of required supplies to keep services running safely based on CDC guidelines.

This included a lack of supplies such as face masks, disinfectant cleaner and soap, hand sanitizer, and gloves.

The community came together to share resources and adapted services to meet the needs of riders during the changed environment; the situation highlighted the importance of proactive emergency planning and increased coordination. FACT coordinated with 211 San Diego and the County of San Diego to provide meal deliveries, trips to testing and vaccination sites, and trips for essential workers. FACT utilized the Community Information Exchange (CIE) platform to receive direct referrals for meal deliveries. FACT continued to offer passenger trips, but with limited ridesharing due to social distancing guidance. FACT suspended fares to prevent social interaction and help individuals financially impacted by the pandemic with transportation. FACT offered similar assistance to cities and local agencies. FACT held weekly virtual conference calls with CAM members to stay connected, share agency updates and best practices, and discuss important issues related to the novel coronavirus outbreak.

FACT will continue to engage CAM members, OES, and other transportation stakeholders regarding proactive emergency planning in general as well as in response to pandemics specifically.

C) ADA Paratransit Services During Driver Strikes

In June 2023 FACT entered into an agreement with MTS to provide service for ADA paratransit riders during their subcontractor driver strike. FACT has provided over 1,000 one-way rides to date under this agreement. FACT will continue to work with transit agencies to support their paratransit services as needed.

4.8 ADA Paratransit and Other Public Transit Contracting Opportunities

FACT has performed ADA paratransit trips for North County Transit District's (NCTD) LIFT program as a subcontractor. In June 2023 a new MOU for a pilot same day on-demand paratransit service was implemented with NCTD. FACT will pursue ongoing contracting and subcontracting opportunities with NCTD and MTS as they arise.

4.9 Lyft Transportation Service for Carlsbad Tourism Business Improvement District

FACT was included in Lyft's proposal to provide flexible rideshare or defined route transportation to/from tourist destinations within the City of Carlsbad. Lyft specifically plans to utilize FACT for accessible trips if selected to provide this service.

4.10 Other Potential Service Contracts

- **Encinitas Circulator Service**
  An unsolicited proposal for 4 local circulator routes was submitted to the City of Encinitas during May 2016. FACT's proposal did not elicit a response. During January 2021 staff at Encinitas resumed discussions regarding a potential community circulator or microtransit service and reviewed FACT's services and capacity. Encinitas staff plan to stay in contact with FACT as the plans for the service move forward.

- **City of Vista Medical Trips**
  The City of Vista contacted FACT staff regarding trips to medical facilities outside of the City of Vista boundaries. The proposal is currently under review by Vista.

- **Carlsbad Lyft**
  Lyft Transportation Service for Carlsbad Tourism Business Improvement District – FACT was included in Lyft's proposal to provide flexible rideshare or defined route transportation to/from tourist destinations within the City of Carlsbad. Lyft specifically plans to utilize FACT for accessible trips if selected to provide this service.

4.11 Projects Deferred for Future Consideration

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

- **Centralized Dispatch Center and Maintenance Program**
  A centralized maintenance facility for FACT vendors and partners would be a benefit. FACT is working with local agencies to assess the potential for a coordinated maintenance program. FACT's brokerage vendors present a ready market for a reasonably priced and centrally located maintenance facility or program. In August 2017 FACT distributed a survey to gauge transportation stakeholder interest in partnering on a centralized vehicle maintenance program. FACT has discussed the program with CAM participants and local businesses. Currently FACT has not identified any funds or organization that is qualified, has resources, and is willing to establish a coordinated maintenance program for local transportation providers.

- **Volunteer Driver Program Resource Allocation**
  FACT does not have flexible or operating funds to aid the volunteer driver programs as envisioned during the early years.

The following projects are available through other organizations and are currently not being considered by FACT:

- **Travel Training**
  Due to other regional services offering specialized services to seniors, this project has been prioritized lower. Travel training is the professional practice of teaching people to travel independently on public transportation. Travel training is most often provided for older adults or for people who have cognitive or physical disabilities other than blindness or low vision.

- **Older Driver Wellness Program**
  Older driver wellness trainings in San Diego County are available through the AARP CarFit program.

- **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.

Chapter 5: Funding

5.1 Current Revenue Sources

A) Grants

FACT is not a direct recipient of FTA funds, which limits its eligibility to apply directly for most federal transportation funds. To access funding through FTA competitive grant programs FACT has to apply through a direct recipient grant program or apply for a grant in partnership with a direct recipient. The most significant sources of

funding for FACT are FTA Section 5310 and SANDAG TransNet Senior Mini-Grant (SMG) grants. 5310 funds are discretionary and awarded through a competitive process administered by Caltrans for rural funding and by SANDAG for urban funding. Senior Mini Grant (SMG) funds, administered by SANDAG, are also competitively awarded. FACT has successfully funded its service operations, mobility management services, and capital purchases (vehicle) through these sources, but the funding is not guaranteed. The amount of funding available each cycle through the SMG and 5310 programs fluctuates and competition for these funds has significantly increased. These programs also have a cap on the amount of funding that can be awarded to a project and/or organization.

Two percent of five percent of regional TDA funds for Community Transportation Services are committed to FACT as per the CTSA contract with SANDAG. TDA funds vary based on the status of tax revenues. FACT's CTSA (TDA) funds are not indexed for growth. One of the requirements of the CTSA contract is to look for revenue to implement or increase services. Due to the short-term and uncertain nature of discretionary grants, FACT is not able to plan for long range programs. According to the FY 2016-18 Triennial TDA Performance Audit of SANDAG, "the action to identify and pursue additional funding sources to support CTSA activities is on-going by both agencies and remains to be implemented".

In response, SANDAG and FACT staff worked together to identify additional and sustainable funds. SANDAG staff proposed allocating a percentage of Specialized Transportation Grant Program (STGP) funding to FACT. This recommendation was reviewed and recommended by the TransNet Independent Taxpayer Oversight Committee and SANDAG Transportation Committee. In July 2020, the SANDAG Board of Directors approved an allocation of 25% of available STGP Cycle 11 funding to the Consolidated Transportation Service Agency for mobility management (See Table 5-1, Mobility Management, and Cycle 11 for funding amount). There have been discussions with SANDAG on continuing this allocation indefinitely with at least 25% of STGP funds. For STGP Cycle 12, FACT was awarded $790,758 in FTA 5310 funds; SANDAG plans to amend TransNet ordinance during 2023-24 to allow for a minimum of 25% STGP funds to be set aside for FACT, during future cycles.

The California Public Utilities Commission (CPUC or Commission) created the transportation network company (TNC) Access for All Program, which created a new funding opportunity for FACT. SANDAG administers the AFA program through an annual competitive grant process. FACT was awarded 100% of Cycle 1 funding and will apply for Cycle 2 as well as future cycles.

TABLE 5-1: SOURCES AND STATUS OF FACT FUNDING[4]

TDA 4.5

Grant	Program/Service	Total Funding	Status
TDA 4.5 2022-2023	CTSA Activities	$188,798	ACTIVE
TDA 4.5 2023-2024	CTSA Activities	$195,019	CLAIM SUBMITTED

Capital

Grant	Program/Service	Total Funding	Status
FTA Section 5310 FY 13 -14	Transportation for Individuals with Disabilities *(7 accessible vehicles)*	$257,349.95	ACTIVE
Senior Mini-Grant FY 16-17		$60,000	
FTA Section 5339 (b)	Accessible Vehicle Replacement and Expansion in San Diego County (5 mini-vans and 1 Bus Cutaway)	$312,027 (match will be covered by toll credits)	AWARDED
FTA Section 5339 (b)	Accessible Vehicle Replacement and Expansion in San Diego County (8 mini-vans and 2 Bus Cutaway)	$466,883 (match will be covered by toll credits)	AWARDED
FTA Section 5339 (b) & (C)	Accessible Vehicle Replacement and Expansion in San Diego County (10 minivans and 10 EV Vans)	$1,868,871 (match will be covered by toll credits)	APPLIED

Mobility Management

Grant	Program/Service	Total Funding	Status
FTA Section 5310 (Cycle 11, Y1)	25% allocation of Cycle 11 STGP funding for Mobility Management CTSA activities	$519,035	ACTIVE
Senior Mini Grant (Cycle 11, Y1)		$402,113	ACTIVE
FTA Section 5310 (Cycle 11, Y2)		$535,309	ACTIVE
Senior Mini Grant (Cycle 11, Y2)		$418,637	ACTIVE

[4] See Business Plan 2023-2028 and prior plans for past funding.

FTA Section 5310 (Cycle 11, Y1)	25% allocation of Cycle 12 5310 funding. FACT was competitively awarded SMG funds as a match to fully fund the CTSA MM CTSA activities.	$790,758	AWARDED
Senior Mini Grant (Cycle 11, Y1)		$790,758	AWARDED
Caltrans 5310	Rural Area CTSA activities	$355,737	CLOSED
Caltrans CRRSAA	Rural Area CTSA activities	$32,929	CLOSED
Caltrans 5310	Rural Area CTSA activities	$375,000	ACTIVE

Operating

Grant	Program/Service	Total Funding	Status
Senior Mini Grant (Cycle 11, Y1)	RideFACT Trip Reimbursement	$200,000	ACTIVE
FTA Section 5310 (Cycle 11, Y1)		$200,000	ACTIVE
Senior Mini Grant (Cycle 11, Y2)		$200,000	ACTIVE
FTA Section 5310 (Cycle 11, Y2)		$200,000	ACTIVE
Senior Mini Grant (Cycle 12, Y1)	RideFACT Trip Reimbursement	$400,000	NOT AWARDED
FTA Section 5310 (Cycle 12, Y1)		$400,000	
Access For All (AFA) – Cycle 1	On-demand wheelchair accessible Service	$2,520,004	ACTIVE
SDG&E Community Assistance	Trips for underserved areas and populations	$1,000,000	NOT AWARDED

Small Grants

Grant	Program/Service	Total Funding	Status
American Cancer Society	NEMT for Cancer related appointments	$5,000	CLOSED
San Diego Foundation	Trips in South San Diego County - Gaps	$30,000	CLOSED
American Cancer Society	NEMT for Cancer related appointments	$10,000	ACTIVE

Planning

Grant	Program/Service	Total Funding	Status
Caltrans FTA ICAM	Technology dev.	$240,000	AWARDED

B) Contracted Agency Services Revenue

FACT has undertaken several contracted agency service initiatives to secure sustainable revenues to meet long range goals and to provide additional services. Current contracts are identified in section 3.4 Contracted Agency Transportation. FACT's brokerage has made it possible to purchase trips at a low cost for other agencies' needs. FACT seeks to establish service contracts with agencies to increase the efficiency of its brokerage and ensure its sustainability. FACT charges an administrative fee for contracted agency services.

5.2 Potential Funding Sources

A) Mobility Management Services

FACT will continue to work with regional service providers and others to promote cost effective contracted agency transportation services. FACT will assist the 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.

B) Small Grant Program Awards

FACT continues to pursue small grant opportunities to support larger projects and cover expenses not funded by other grants. Examples of smaller grants include the California Teleconnect Fund, County of San Diego Community Enhancement (CE) and Neighborhood Reinvestment program (NRP), American Cancer Society – Community Transportation, and San Diego Foundation – Age Friendly Communities. FACT has used these sources to purchase equipment, fund small projects such as reports or printing, and help fill gaps in funding or to expand services. These projects trips are essentially performed on RideFACT, but with different eligibility and data tracking requirements based on the funding source.

C) Sales Tax Measures

During a March 29, 2019, meeting with SANDAG Executives FACT was advised that it would be considered for inclusion as a designated recipient in the SANDAG local tax-based funding measure. This proposal is consistent with actions taken by several counties in support of CTSA services. FACT will participate in the process and advocate for inclusion in future tax measures.

D) Fundraising

Historically FACT has relied on grant funding and contracted service revenue to support staff and operate services. Staff have begun pursuing fundraising opportunities and networking with philanthropy, foundation, and other donor organizations. In May 2023 staff responded to a Yield Giving Call for projects. The Yield Giving Open Call is a $250 million open call focused on elevating organizations working with people and in places experiencing the greatest need in the United States: communities, individuals, and families with access to the fewest foundational resources and opportunities.

Chapter 6: Deliverables and Managing Demand

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.

FACT will continue providing referrals to ensure riders utilize all available transportation services. FIGURE 6-6 shows projected services in one-way trips and other service units (web hits, referrals, research, etc.), as well as projected funds for operating 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 developing the transportation brokerage and generating additional revenue to support FACT's services. In 2013, ridership for RideFACT and contracted services jumped to 14,462 trips in FY 2013, 22,286 in FY 2014, and 24,803 In FY 2015. In FY 2016 total ridership experienced its first decrease with 20,733 trips, but In FY 2017 total ridership increased significantly with a record of 29,045 trips. In FY 2018 FACT provided a total of 37,334 trips**.** Ridership in FY 2019 remained stable, slightly increasing to 37,392 total trips. FACT ridership has continued to grow with 40,061 trips in FY 2020 and 42,861 trips in FY 2021.

At first the Covid-19 pandemic disrupted operations and led to a sharp decline in ridership. FACT began working closely with the County of San Diego and 2-1-1 to meet the new need for meal deliveries related to stay at home health orders. FACT extended service to all residents impacted by COVID-19 traveling for essential purposes. As a safety precaution, FACT temporarily eliminated rider fares and discouraged ridesharing to limit social interaction. The demand for meal deliveries and essential transportation was significantly higher than anticipated. Higher demand, increased safety protocols, and limitations of other services related to pandemic led to higher-than-normal ridership and an increased cost per trip. To safely keep up with demand, FACT's cost per trip and monthly billing increased dramatically. During COVID-19 several brokerage vendors scaled back operations and one vendor shut down business limiting FACT's trip supply. Driver shortages and increasing expenses such as salaries and insurance have led to increased vendor rates and less capacity.

These market conditions have increased FACT's average per trip cost accessed through the brokerage model. This has led to a decrease in the number of rides FACT can afford under the Cycle 11 RideFACT budget. Despite increased costs, contracted services trip numbers have remained relatively stable. In

FY 2022 FACT provided 38,303 trips total: 23,119 RideFACT trips and 15,184 contracted service trips. Figure 6-1 shows FACT's ridership from July 2020 to March 2023. FACT's average trip length has remained stable (FIGURE 6-3), but the average cost per trip has increased as shown in FIGURE 6-4

FIGURE 6-1 RIDEFACT AND CONTRACTED TRIPS (July 2020– March 2023)
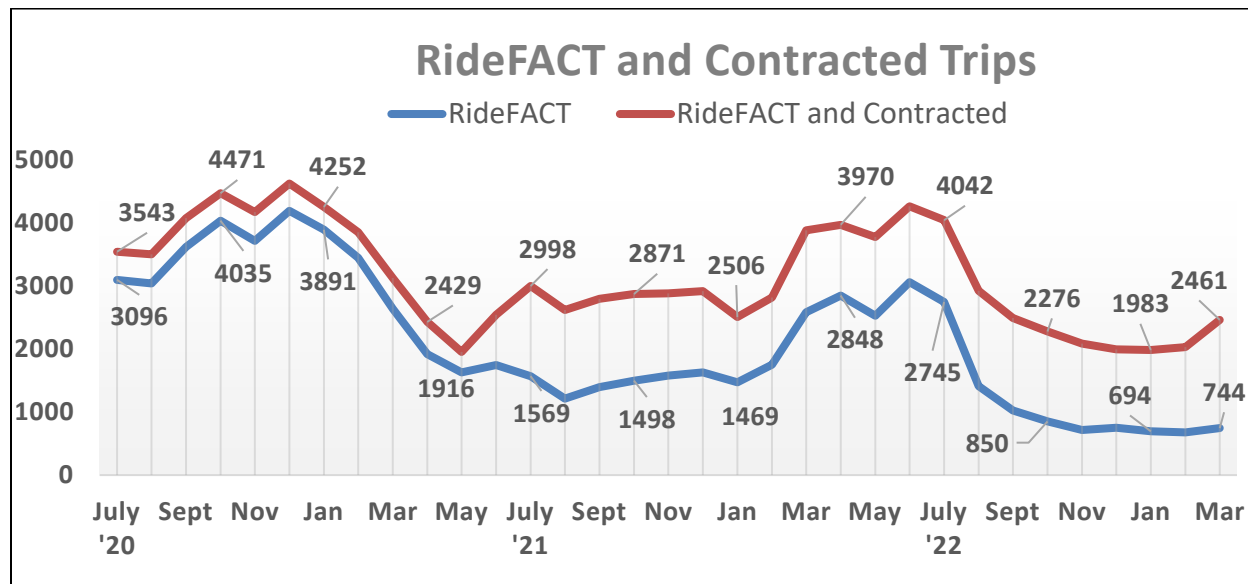

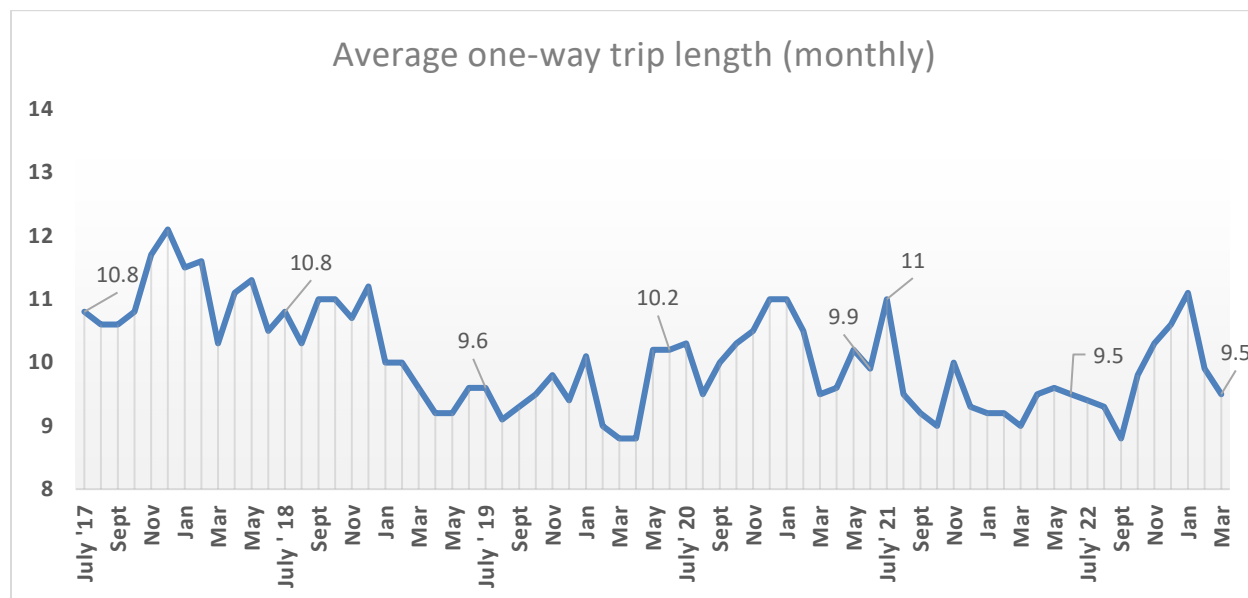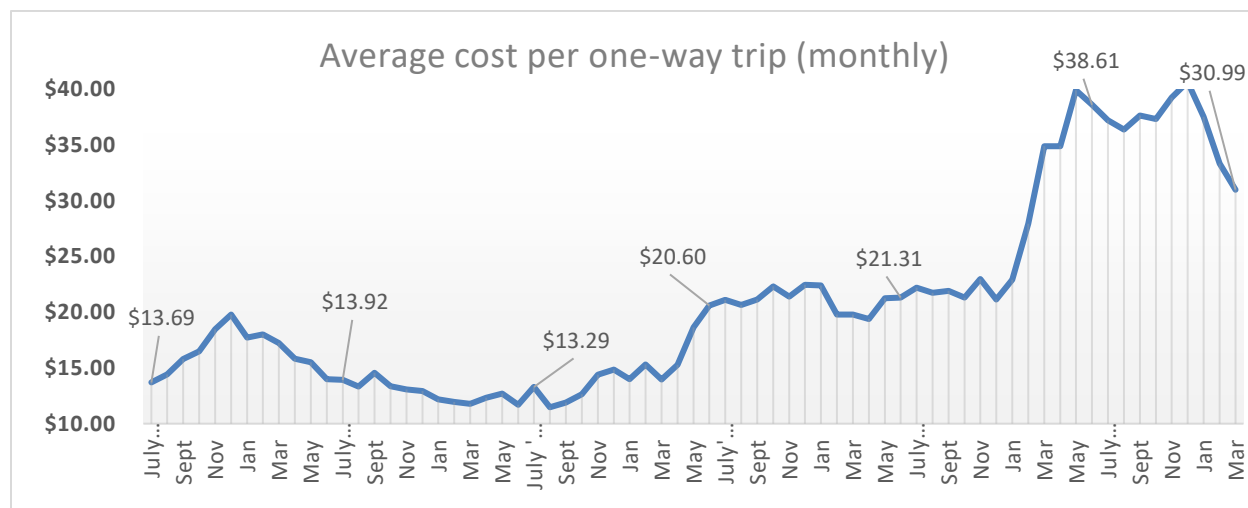FIGURE 6-2 MONTHLY AVERAGE TRIP LENGTH (July 2017 – March 2023)

FIGURE 6-3 MONTHLY AVERAGE COST (July 2017 – March 2023)

Average cost per one-way trip (monthly)

In general FACT's operating funds have remained relatively constant over the past few years. Based on available operating funds, demand, and increased trip costs FACT may need to limit the number of trips available per day. For example, in 2018 FACT opted to limit RideFACT service to 100 trips per day based on first come first serve basis over a 12-month period to maintain service throughout the funding timeframe. From September 2022 to June 2023, FACT had to limit ridership to 30 trips per day to make funds last until additional funds were obtained. FACT has pursued other sources of funding including County of San Diego Community Enhancement Grant program, Caltrans and SANDAG CRRSAA 5310 programs, and State of California Relief Grant Program. Contracted services have helped by providing an opportunity for FACT to partner with agencies to provide transportation on their behalf for a small administrative fee that offsets the cost of trips and generates net revenue for FACT.

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 outcomes and the customer experience. Agency contracts have allowed FACT to charge administrative fees, providing additional financial support for transportation services. Managing the supply side of trips through the brokerage has been a challenge due to the taxicab industry declining due to competition from services like Uber and Lyft. Operating expenses have increased for brokerage members causing them to increase their per trip rate (see FIGURE 6-5, AVERAGE Purchase Cost). With stagnant operating funds and increased per trip costs FACT is unable to sustain service levels and expand services to meet the needs of the growing senior population. FACT is actively researching and pursuing other funding sources to support RideFACT growth as well as planning, capital, and mobility management grants that support and develop accessible transportation.

Figure 6.4 shows ridership levels and demand for trip purposes for FY 2022

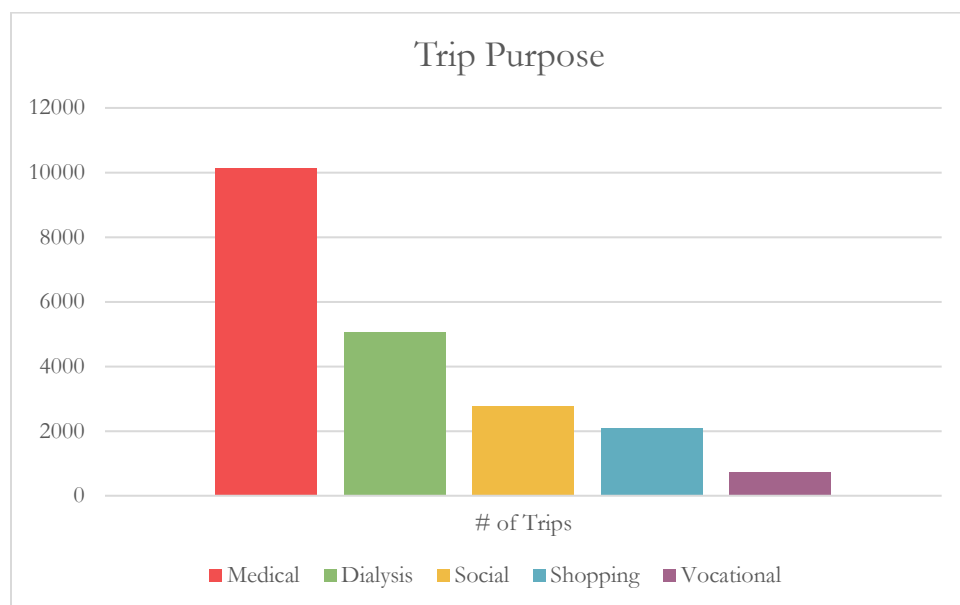FIGURE 6.4 – Trips by Purpose FY 2022

FIGURE 6-5 SERVICE STATISTICS (FY 2021 & FY 2022)

CATEGORY	FY 2021	FY 2022
Total one-way trips	42,861	38,303
RideFACT	37,293	23,119
Contracted Agency Services	5,568	15,184
AVERAGE Purchase Cost of one-way trip	21.08	$27.54
AVERAGE trip length (miles)	10.02	9.5
% of Trips for Seniors	59%	76%
% of Trips for Individuals with Disabilities	71%	61%
% of Trips for Medical purposes	53%	66%

FIGURE 6-6 SERVICE DELIVERABLES

Operating Projects

Each cycle FACT applies for both SMG and 5310 funding through SANDAG's STGP program to fund RideFACT. FACT uses these sources to meet the local match requirement and fully fund its projects. FACT was not awarded SMG and 5310 Funding through Cycle 12 for RideFACT, but was awarded funding through the Access for All program (AFA), which will be used to serve RideFACT riders and additional riders who have mobility issues once Cycle 11 RideFACT operating funds are spent.

RideFACT – Trips:

Approximately March 2022 to September 2023 (SANDAG STGP CYCLE 11)			
	SMG	**5310**	**Total**
Total funding (2 years)	$400,000	$400,000	$800,000
Approximate number of OWPT	44,000		
Projected cost per trip	$18.18		

FACT's AFA RideFACTNow is a new on-demand service with unknown demand. The bulk of the $2,520,004 budget will be used to provide rides.

RideFACTNOW – Trips:

Approximately June 2023 to July 2024 (SANDAG AFA CYCLE 1)		
	AFA	**Total**
Total funding (1 year)	$1,867,004	$1,867,004
Approximate number of OWPT	TBD	
Projected cost per trip	TBD	

Mobility Management Projects

Mobility Management projects are critical to sustaining services and managing growing demand. Mobility Management projects fund administration and many different activities that are not quantifiable in relation to units provided (e.g., outreach, training, coordination, and managing FACT's transportation brokerage). These activities are critical for planning, operating, and developing services to meet demand. Currently the main sources that fund Mobility management are as follows: Caltrans FTA Section 5310, SANDAG Specialized Transportation Grant Program (STGP), SANDAG Access For All (AFA), SANDAG Transportation Development Act (TDA) 4.5. Each program has different Performance metrics/deliverables. These deliverables include but are not limited to referrals, website hits, cost savings of the brokerage model, number of vehicles shared, surveys administered and responses, grantee technical assistance, and changes to FACT's online database.

Capital and Planning Projects

Capital investments are required to support FACT's services and to manage demand. Capital projects fund the one-time purchase of goods, but there may also be a planning component involved. Like Mobility Management projects, capital projects are difficult to quantify in terms of units provided. Vehicle purchases have been funded by the FTA's Section 5310, SANDAG's Senior Mini-Grant, and FTA's Section 5339 programs. Vehicle project deliverables include, but are not limited to reporting mileage, passenger trips, vehicle trips, maintenance and repair costs, and rider demographic information. Other capital and planning projects include software and hardware purchases, such as Transportation Management Software, Mobile App development, software integration, and potentially cameras and tablets. Sources for these types of purchases have included VTCLI, ICAM, and AFA. Planning activities and development progress are reported to each grantor.

Appendix 1 – CTSA Work Plan

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

Work Plan for Fiscal Year 2024

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 coordinator 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.

In 2006 San Diego Association of Governments (SANDAG) designated Full Access & Coordinated Transportation, Inc. (FACT) the Consolidated Transportation Services Agency (CTSA) for San Diego County. As the CTSA, FACT works to improve dedicated transportation services for people with disabilities, seniors, social service agencies, health care providers, various organizations and individuals within San Diego County. FACT is also the planning representative of the social service transportation community and works with the region to develop updates to the Coordinated Plan. FACT has begun the process to update the Business Plan (2024-2029 Business Plan Update) that forms the planning foundation for organizational development and the expansion of coordinated services in the region.

Expenses:

1. **One-call/one-click Mobility Center**

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

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

   Telephone Referrals
   - Respond to telephone requests for transportation information. Educate callers about transportation options from database.
   - Provide enhanced in-person customer service where necessary to assist with ADA application process or take reservations for other providers, etc.

2. **Regional Coordination**

   Administer Council on Access and Mobility (CAM) and Other Meetings

- Conduct Council on Access and Mobility (CAM) meetings (at least 4 annually) and other meetings related to regional coordination
- Continue outreach to providers
- Represent CAM during Level 3 or higher emergencies and coordinate disaster response as needed. Coordinate with the County Office of Emergency Services (OES) to ensure effective emergency preparedness planning. Assist OES to develop an emergency response plan.
- Conduct monthly FACT Board of Director Meetings and Board subcommittees as needed

Training/Workshops
- Facilitate a workshop/ training on issues of interest to CAM and partners
- Include guest speakers and educational items during CAM meetings

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

Coordinated Planning
- Provide ongoing technical assistance and support to social 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
- Market services through press releases, brochures, newsletters, newspaper articles, special events, workshops, and community trainings.
- Participation in Social Services Transportation Advisory Council (SSTAC), ADA Review Groups, Alliance for Regional Solutions (ARS), Volunteer Driver Coalition, and Age Well Meetings, etc.
- Attend SANDAG Transportation Committee, SANDAG Board, NCTD and MTS Board, City Council, and County Board of Supervisors meetings as needed.
- Provide input, data, and pictures for the SANDAG Coordinated Plan.

Coordinated transportation and vehicle sharing
- Partner with social service agencies, healthcare providers, cities, County of San Diego, and transit agencies to assist clients in need of transportation.
- Partner with social service agencies, specialized transportation providers, and brokerage partners to share accessible vehicles.

3. **Management of CTSA Activities**

- Disseminate quarterly CTSA FACT Newsletter to ensure ongoing awareness of current related events
- Maintain the CTSA Mailing List
- Complete all required reporting
- Maintain memberships in State and National organizations committed to coordinated transportation and non-profit corporation development: California Association for Coordinated Transportation (Cal-Act), American Public Transportation Association (APTA), etc.
- Travel to conferences and sponsored trainings.
- Annually update FACT's Business Plan 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.
- Maintain FACT's staff to ensure capacity to support ongoing programs and services and expansion as per the approved Business Plan.
- Participate in Annual TDA 4.5 Audit, Internal Agency Audit, and Triennial TDA 4.5 Audits
- Report Scope of Work deliverables to SANDAG quarterly

4. *Grant Support*

- Apply for Section 5310, Senior Mini-Grant, and other grant funding to support core CTSA activities
- Provide local match funds as needed to support awarded grant projects

5. *Transportation services*

- Provide RideFACT transportation for seniors, individuals with disabilities, and other underserved vulnerable populations in San Diego County.

All TDA 4.5 funding for FY 2024 will be used for CTSA activities. FACT was awarded both 5310 and Senior Mini-Grant funding to support these activities.

Appendix 2 – FACT Service Area Map

RIDEFACT AND CONTRACTED TRIPS BY AREA (FY 2022)

Appendix 3 – Website Links

1. List of Service Providers
   https://factsd.org/brokerage/

2. FACT Equal Employment Opportunity (EEO), Title VI Complaint Procedures, and Non-Discrimination Program
   https://factsd.org/dei/