



# ANNUAL REPORT

July 1, 2022 – June 30, 2023

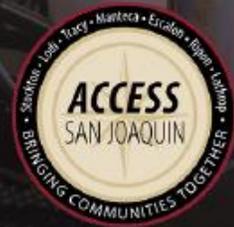
## WORK PLAN

July 1, 2023 – June 30, 2024

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## Introduction

Headquartered in Stockton, California, San Joaquin Regional Transit District (RTD) serves as the Consolidated Transportation Services Agency (CTSA) for San Joaquin County under the name Access San Joaquin (ASJ). ASJ consists of RTD mobility staff and contractors who conduct the many services offered throughout San Joaquin County. In addition, representatives from local cities and the County serve as members of the Technical Advisory Committee (TAC) to provide guidance and recommendations to the CTSA.

One of the primary goals of ASJ is to improve the quality of transportation services for limited mobility groups such as seniors, veterans, and persons with disabilities.

Some of the benefits include:

- Enhanced mobility options for those unable to use traditional transit services.
- Centralized information for countywide transit services including RTD, Lodi GrapelLine, Tracy TRACER, Manteca Transit, Escalon eTrans, and Ripon Blossom Express.

As part of an annual review process, ASJ is required to provide a report after each fiscal year of service to the San Joaquin Council of Governments (SJCOG). This document serves as the fourth annual report for the year of service beginning July 1, 2022, and ending June 30, 2023.

## Background

### **Establishment of San Joaquin County's first CTSA**

Under California law, a CTSA is an agency that coordinates and provides social service transportation, including services for the elderly and individuals with disabilities who are unable to use conventional transit services. CSAAs were created in 1979, when the state legislature passed Assembly Bill 120, named the "Social Services Transportation Improvement Act." The purpose of the state law was to improve the quality of transportation services to limited mobility groups while achieving cost savings and more efficient use of vehicles and funding resources. CSAAs were seen as a flexible mechanism to address the problem of inefficient or duplicative transportation services. SJCOG, as the Regional Transportation Planning Agency (RTPA) for San Joaquin County, is responsible for designating the CTSA. On May 24, 2018, the SJCOG designated RTD as the CTSA. Under the Transportation Development Act (TDA), there are two potential sources of funding for CTSA activities. One is the Local Transportation Fund (LTF) which is allowed up to 5% of the regional apportionment under the law and the other is the State Transit Assistance Fund (which does not have a statutory percentage limitation).

In an effort to seek efficiency in service delivery with other local transit operators in San Joaquin County, RTD, with the support of the transit providers in San Joaquin County, proposed

to form a CTSA in early 2018 with RTD initiating and administering both new and existing countywide services to support seniors and persons with disabilities, as well as eliminate duplicated efforts conducted by the transit providers. While the CTSA can be funded with as much as 5% “off the top,” the approved proposal called for the CTSA to be funded by a 2% “off the top” allocation from the regional LTF apportionment. Under this proposed agreement, the CTSA was established in Fiscal Year 2018-2019 with an initial budget from 2% of the LTF apportionment which equaled \$552,774. This item was approved unanimously by the SJCOG Social Services Transportation Advisory Committee, Technical Advisory Committee, Management & Finance Committee and was presented to the SJCOG Board of Directors in May 2018.

At the May 24, 2018, SJCOG Board of Directors meeting, the board voted unanimously in favor of the proposal, effectively establishing RTD as the CTSA for San Joaquin County. It was noted during the meeting that many of the proposed services were new, and as a result, it was expected that the estimated costs of the services would be reconciled at the end of the service year. The newly formed CTSA began operations five months later in October 2018 under the name ASJ.

### **CTSA TAC Partners**

Below are the partners that make up the CTSA in San Joaquin County:

- **RTD:** RTD is the regional transit provider for San Joaquin County, serving the Stockton Metropolitan Area and unincorporated County areas with intercity, interregional, Americans with Disability Act (ADA) paratransit, demand response and rural transit services. In 1994, enabling legislation expanded RTD’s service area to serve all of San Joaquin County.
- **Lodi GrapeLine:** The City of Lodi operates fixed route, general public Dial-a-Ride, and ADA Paratransit services from the Lodi Transit Station within the City of Lodi, and to select locations in Acampo, Woodbridge unincorporated areas, and Villa Cerezos Mobile Home Park. The Lodi Transit Station is an intermodal transit facility and serves RTD County Hopper, Amtrak San Joaquin, South County Transit (SCT Link) to Galt and south Sacramento County, and Greyhound.
- **Tracy TRACER:** TRACER offers fixed routes, ADA paratransit, subsidized taxi, ACE & South Tracy Shuttle, and on demand transit service within the City of Tracy and in the Larch-Clover unincorporated area.
- **Manteca Transit:** Manteca Transit operates fixed route, Dial-a-Ride, and ADA paratransit within the City limits of Manteca.

- **Escalon eTrans:** eTrans is available to the general public by way of a door-to-door demand response service within the City of Escalon and to Riverbank and a deviated fixed-route service connecting Escalon and Modesto, Monday-Friday.
- **Ripon Blossom Express:** Blossom Express operates deviated fixed-route service on Tuesdays and Thursdays between Ripon and Modesto as well as door-to-door service for seniors and persons with disabilities under contract with Bethany Home.
- **City of Lathrop** –RTD is operating County Hopper routes in the City of Lathrop.



### CTSA TAC

The TAC was formed following the establishment of ASJ by the SJCOG Board. Consisting of transit managers, SJCOG and city representatives, the TAC meets on a monthly basis and

provides guidance and recommendations on CTSA activities, services, performance data, and the development of the CTSA annual work plan for new and existing services.

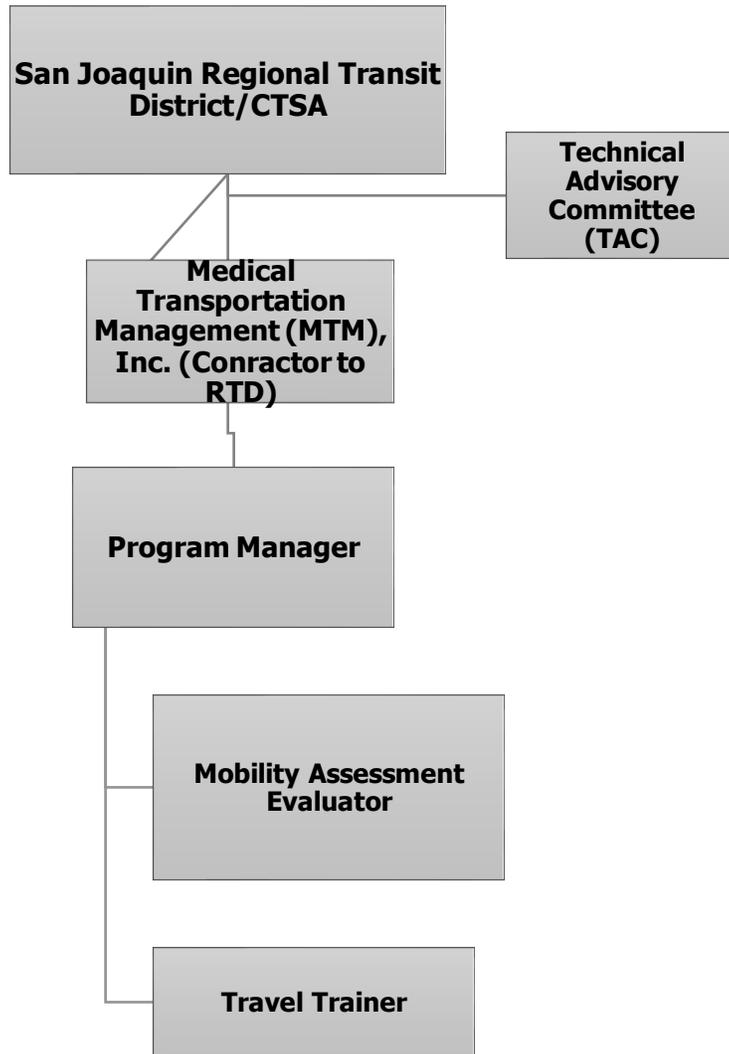
*FY 2024 TAC Members:*

The TAC meets on the third Monday of each month via Zoom and in person as needed.

Current members of the TAC are the following:

- Joel Campos** – *Senior Regional Planner, SJCOG*
- Dámaris Galvan** – *Planning and Service Development Director, San Joaquin RTD*
- Ken Baxter** – *Government Affairs Director, San Joaquin RTD*
- Tonisha Mixon** – *Mobility Manager, San Joaquin RTD*
- Dorrae Moore** – *Program Manager- ASJ - Medical Transportation Management*
- Julia Tyack** – *Transportation Manager, City of Lodi*
- Frank Huang** – *Assistant Transportation Planner, City of Lodi*
- Juan Portillo** – *Public Works Manager-Transit, City of Manteca*
- Celine Barber** – *Administrative Analyst, City of Manteca*
- Ed Lovell** – *Transportation Manager, City of Tracy*
- Jayne Pramod** – *Transportation Coordinator, City of Tracy*
- Brandi Reybol** – *Transit Coordinator, City of Tracy*
- John Andoh** – *Transit Manager, City of Escalon*
- Angel Abarca** - *Assistant Engineer, City of Lathrop*

## Access San Joaquin Organization Graph



## Access San Joaquin Contracted Services

The service contract was awarded to Medical Transportation Management, Inc. (MTM) by the RTD Board of Directors in December 2020. Service started on January 2021 MTM staff consists of a:

- **Program Manager** - Directly responsible for oversight of the day-to-day operations and administration of ASJ, including the ADA eligibility certification process, travel training, My Ride, Discount Fare Card, and Access Pass programs. The Program Manager also performs outreach activities required to effectively promote and administer ASJ's programs throughout the county.

- **Mobility Assessment Evaluator (MAE)** - Conducts ADA Eligibility Assessments over the phone for Stockton, Lathrop, Manteca, Lodi, Escalon, Tracy, and Ripon. The contractor stores data for ADA eligibility in their proprietary software (MTM Access) and provides monthly performance reports to the TAC.
- **Travel Trainer** – Conducts a variety of travel training services and related outreaches.

MTM staff offices are located at the Downtown Transit Center (DTC) and reports to RTD’s Mobility Department.

## Description of CTSA Services

### Access Pass

The Access Pass encourages ADA-certified passengers to ride fixed-route services instead of paratransit services by offering free fares for all San Joaquin County local fixed routes as well as the RTD Commuter Route 150 that travels to the Dublin/Pleasanton BART Station. ADA-certified passengers are automatically eligible for the Access Pass after completing the ADA eligibility assessment and being deemed eligible. Since the cost per trip on fixed-route service is much lower than that of paratransit service, this program provides benefits for persons with limited financial means, and operational benefits for agencies.

### ADA Eligibility Assessment

In 1990, the ADA declared that access to mass transit is a civil right and mandated transit agencies provide complementary paratransit service along with regular fixed-route service. To qualify for ADA paratransit services, passengers will go through an ADA eligibility assessment. Under the CTSA, the eligibility is centralized and conducted in person by a professionally trained ASJ Mobility Assessment Evaluator. This service offers a single point of contact for countywide residents, which is available five (5) days a week via satellite offices throughout the county.

### Discount Fare Card (DFC)

The Federal Transit Administration stipulates that recipients receiving urbanized area program funds (Section 5307), “must allow the elderly, persons with disabilities, and Medicare cardholders to ride the fixed-route services for a fare that is not more than one-half the base fare charged.” Under the CTSA, administrative processes are regionalized and streamlined. Qualifying passengers are issued a single DFC that is valid for all transit systems in San Joaquin County.

### Travel Training

Travel training offers several operational and financial benefits to the transit systems and allows for transportation options to be exercised by riders. By encouraging passengers to use the most appropriate and cost-effective transit option, Travel Training will increase the efficient use of the public transit system and decrease the cost in providing ADA paratransit services.

Travel training is offered to all passengers cost free, regardless of whether they are deemed eligible for ADA services. The Travel Training program teaches participants to navigate independently to specific destinations, maneuver mobility aids on and off buses, identify landmarks, and travel to and from bus stops using the following services: San Joaquin RTD, Lodi Grapeline, Tracy TRACER, Manteca Transit, Ripon Blossom Express, and Escalon eTrans services.

This is an effective program essential for providing equitable access to public transit. Under the CTSA, an expert travel trainer, knowledgeable about transit systems in San Joaquin County, provides comprehensive instruction on using local transportation options and helps passengers travel independently, safely, and confidently.

The program uses a series of gradual steps to build confidence and independence.

### My Ride

The My Ride Program offers ADA-certified passengers an additional mobility option. This program allows passengers to select their own volunteer drivers (e.g., family, friends, or neighbors) and reimburses them for their mileage at the maximum Internal Revenue Service (IRS) standard rate (65.5 cents per mile in 2023). Since most ADA paratransit trips cost over \$40 per trip, a My Ride trip offers a significant financial benefit for agencies. In FY 22 and continuing in FY 23, this program was available for any trips within San Joaquin County and for trips to medical appointments in Modesto.

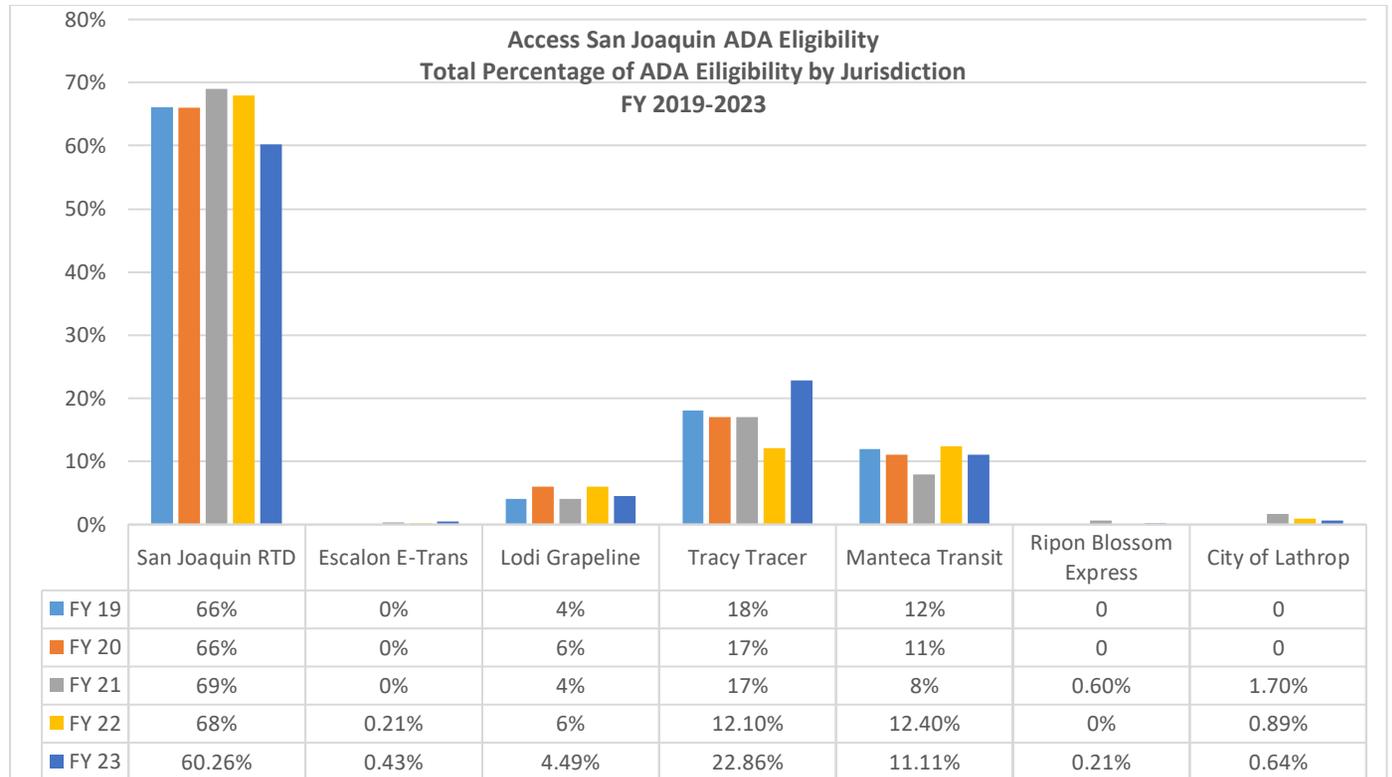
## **Programs Overview**

During FY 2023, ASJ continued strict adherence to Federal, state, and local COVID-19 guidelines and initiatives, and implemented new initiatives aimed at championing the health and safety of our riders, staff, and contractors.

FY 2023 ASJ continued to promote its programs. As more social services programs resume regular operations, the use of ASJ programs increased, compared to the previous year when the pandemic was at its highest. The following provides an overview of each program and the evolution of the use of the services:

Graph 1 below shows that 60.26% of those assessed for ADA eligibility were within RTD’s jurisdiction—which includes the unincorporated areas of San Joaquin County (e.g., French Camp, Mountain House). The RTD jurisdiction percentage saw a decrease of 7.7% from FY22 to FY23. Escalon saw an increase of 0.22% from FY22 for a total percentage of 0.43%. Lodi saw a 1.5% decrease over 2022 to 4.4% of the total. Manteca saw a 1.2% decrease over FY 22 to 11.1% of the total. Tracy saw an increase from 12.1% to 22.86%. Ripon increased from 0% to 0.21%. Lathrop decreased from 0.89% to 0.64%.

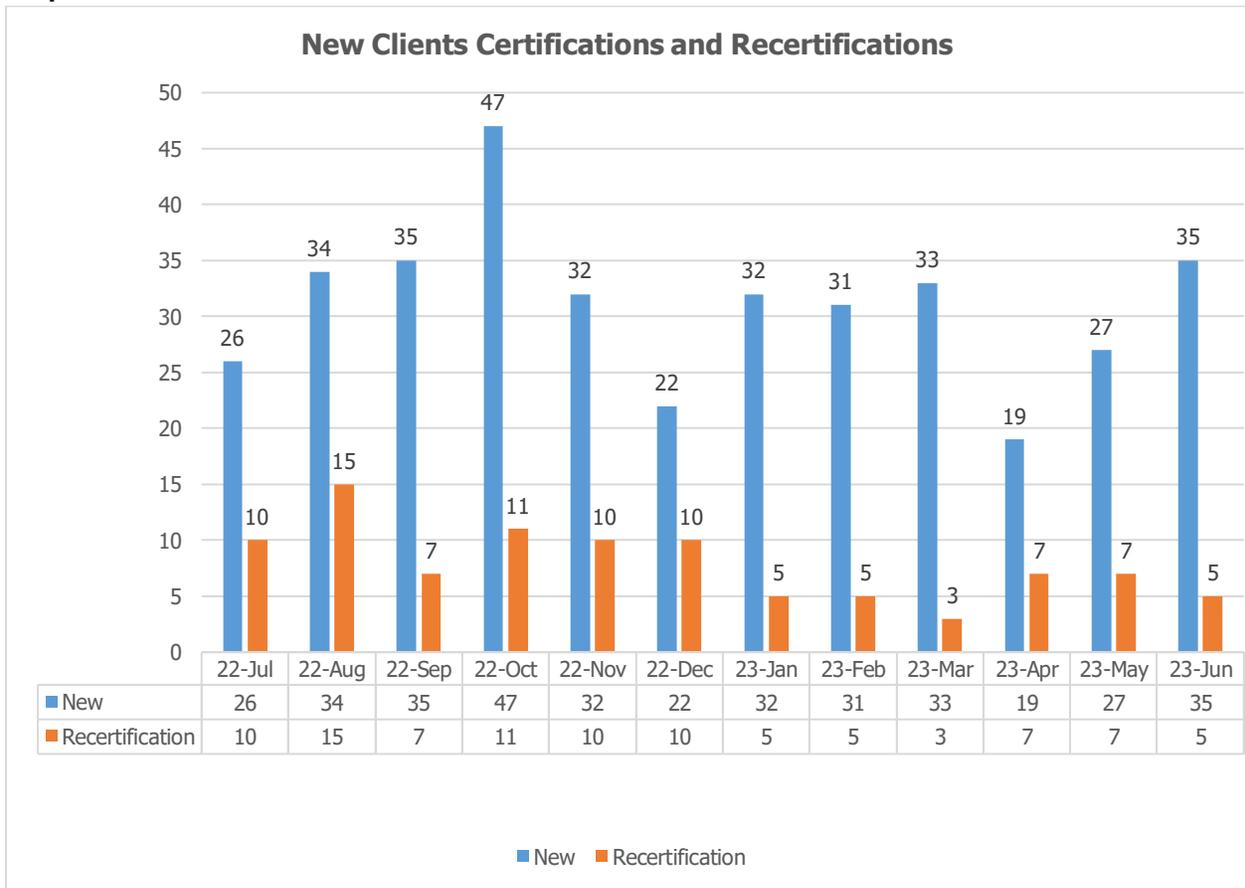
**Graph 1**



**ADA Eligibility Assessment**

In Person Assessments (IPA) resumed as of July 2022 in alignment with the start of FY 23. From the assessments performed, Graph 2 below shows the number of new client certifications and recertifications in FY 23. From July 2022-October 2022, there was an upward trend of new applicants. Between November 22 and June 23, the trend stabilized and an average of 26 new applicants were reported. Recertifications also decreased after December 22. This can be attributed to an overall increase in travel all modes of transportation after many social services programs reopened during the first half of the year and after that, certification and recertification services continued with a more stable trend.

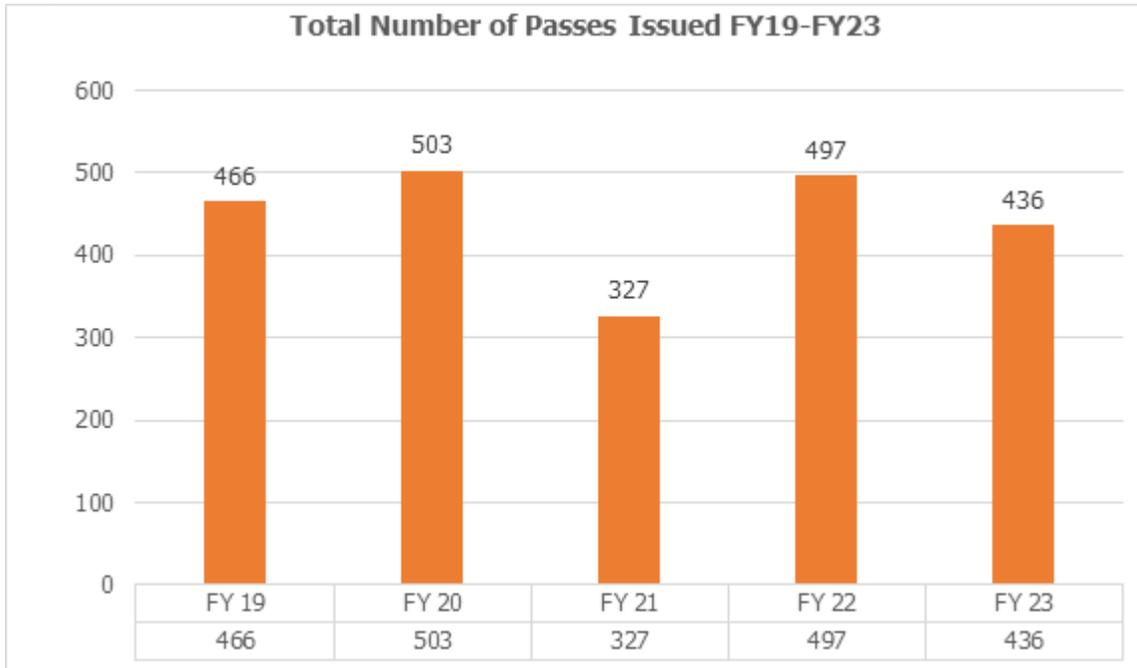
**Graph 2**



**Access Pass Program**

The Access Pass Program provides ADA-certified passengers the flexibility to travel within the San Joaquin County without advance reservation. This free fare pass allows new and existing ADA passengers to ride most fixed-route services on all systems in San Joaquin County free of charge. Access Pass badges are sent to all ADA-certified applicants. ASJ distributed a total of 436 Access Passes in fiscal year 2023. The number includes new, recertified, and replacement passes, displayed on Graph 3.

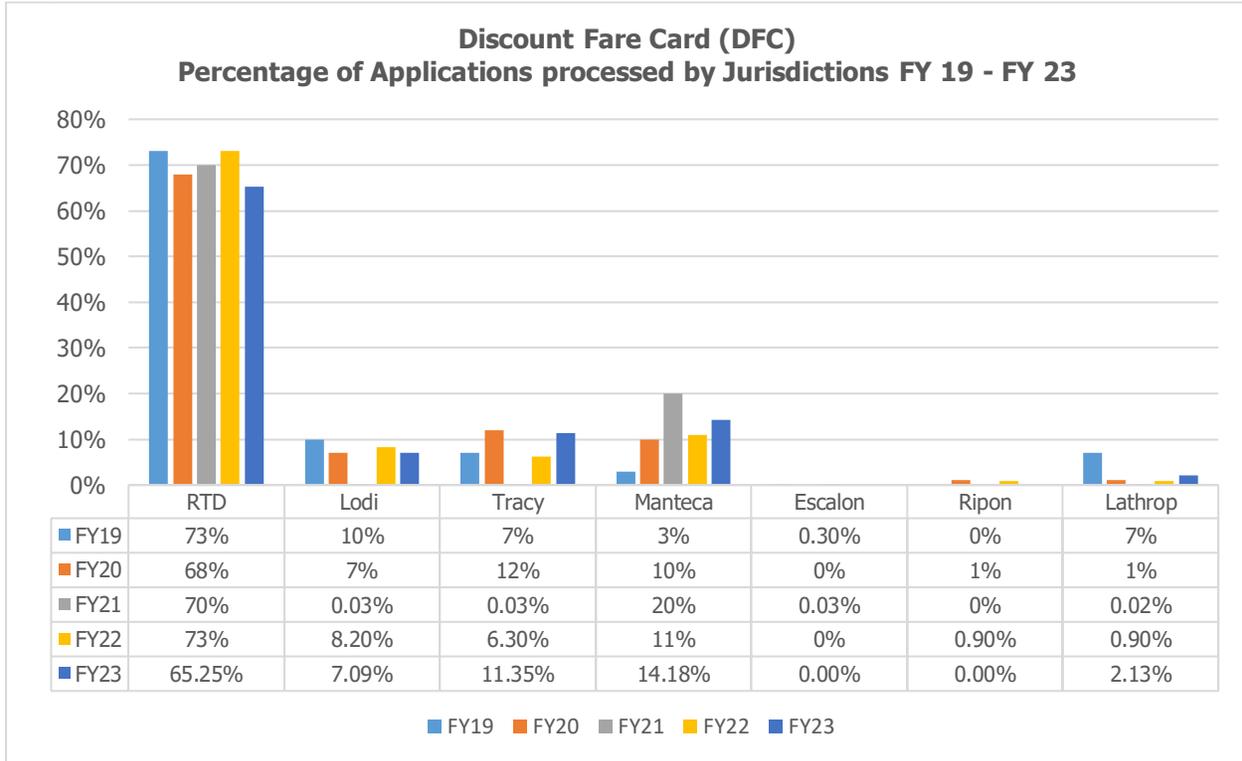
**Graph 3**



## Discount Fare Card Program

The DFC processing was consistent with what was observed in FY 22. Escalon and Ripon did not have any DFCs processed. Below is an overview of the DFC applications processed (in percentage) by jurisdictions from the start of the CTSA in FY19 through FY23.

**Graph 4**



## Travel Training

Travel Training resumed July 2022 and received a total of 492 informational calls, 51 referrals, and participated in 70 public outreach activities. The Travel Trainer interacted with 718 members of the public during outreach events and successfully conducted 540 total hours of travel training. Where was travel training done? What is the history of travel training participants?

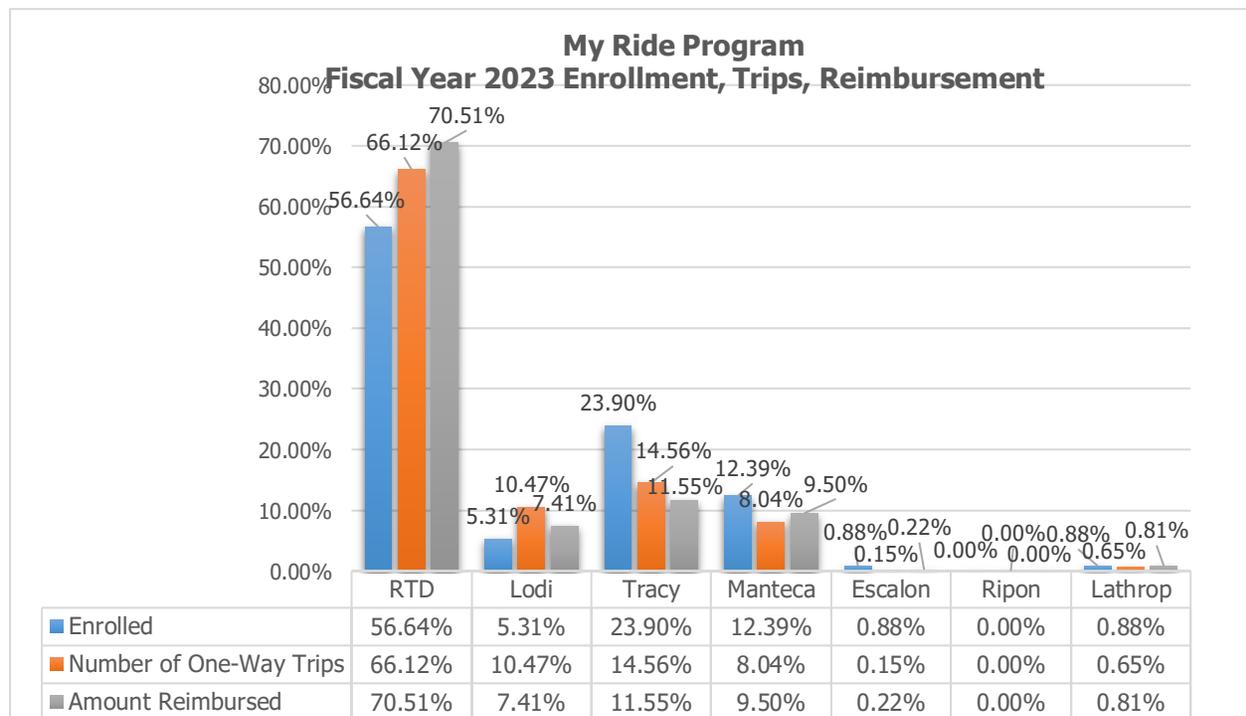
## My Ride Program

There was a total of 33 active clients at the start of FY 23. At the end of the fiscal year, 43 new clients enrolled. On December 2022 CTSA members jointly agreed to reach out to clients in the jurisdictions to promote the My Ride program. Due to this and other marketing outreach efforts, there was an increase in enrollments. Other My Ride marketing outreach included social media, newspapers, and radio ads.

By June 30, 2023, there were 43 new clients added to the program for a total of 53 active My Ride clients. Not all My Ride clients participated in the program each month, some new clients never submitted mileage reimbursement logs and discontinued use of the program. Below is an overview of the program during FY 23. The graph below shows that RTD had the highest percentage of enrolled clients at 56%, Tracy 23%, Manteca 12%, Lodi 5%, Escalon 0.88%, Lathrop 0.88% and Ripon had no enrolled clients. There was a total of 1,481 one-way trips in FY 23 from which RTD had 66.12% of one-way trips, Lodi 10.47%, Tracy 14.56%, Manteca 8.04%, Escalon with 0.15%, Lathrop with 0.65% and Ripon did not have any trips.

Reimbursements totaled \$80,892.07 for FY 23. RTD had 70% of reimbursements, Lodi 7.41%, Tracy 11.55%, Manteca 9.50%, Escalon 0.22%, Lathrop 0.81% and no reimbursements for Ripon.

**Graph 5**



## Accomplishments, Challenges, and Outreach Efforts

ASJ continued efforts to increase resources utilization in the performance of its different program. Below are highlights of the accomplishments in different areas:

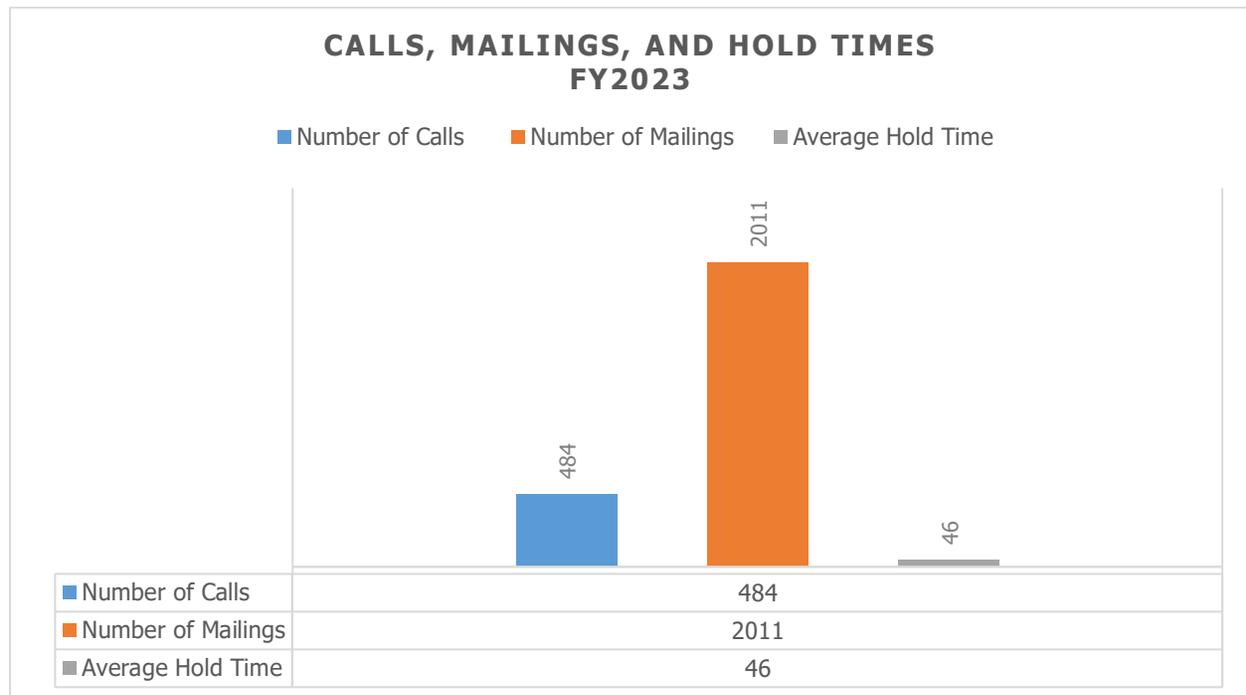
ADA Eligibility Assessment

Eligibility was managed in 2022 through a combination of Medical Verification Forms (MVs) and in person assessments by MTM. Prior to July 2022 ASJ staff scheduled site visits with member agencies and planned for the resumption of in-person assessments effective July 1, 2022. ASJ staff created standard operating procedures to establish consistent application of the interview and assessment process.

Customer Service

The ASJ call center maintained a high level of customer service responding to calls in a timely manner. The graph below displays the number of calls, average hold time (minutes), and mailings to customers.

**Graph 6**



DFC Program

In fiscal year 2023 the demand for public transportation services saw considerable increase. There was an increase in applications for the DFC. From 110 applications in FY 22 to 141 for FY 23. The DFC has a three-year eligibility for some participants and no expiration for others depending on eligibility criteria. No expiration criteria are Medicare, Veterans, and Senior Citizens. For those participants that have DFC with an expiration date, ASJ staff produced a recertification letter to alert participants on the expiration date and including an application to

recertify prior expiration. Participants with no expiring eligibility were issued a DFC that shows No Expiration, with no need to recertify in the future.



### **My Ride Program**

In January 2023, the reimbursement rate increased to 65.5 cents per mile. MTM assumed responsibility for payment of the reimbursement by check to the eligible passenger. The My Ride application forms were updated to show the increase in reimbursement rate and emphasized the responsibilities of the eligible passenger and volunteer driver. The MAE and Travel Trainer contact every new and recertifying ADA applicant to present the advantages of the My Ride program which yielded some new participants. ASJ implemented a marketing campaign for My Ride. The campaign utilized newspaper, radio, and social media to bring about awareness of the My Ride program. ASJ staff used a software program called TripTrak to track My Ride data, however, after a one-year evaluation, the software was proven to be ineffective as it did not reduce data entry and administrative time. Staff will continue to track data using a ready to use template at no additional cost. The My Ride program also expanded to include all trip purposes into Stanislaus County only.

## How does it work?

1. ADA-certified passengers are automatically eligible for My Ride and will be enrolled once both Passenger and Volunteer Driver waivers have been completed and returned to Access San Joaquin.
2. Passengers can recruit drivers from relatives, friends, and neighbors whom they know and trust.
3. Both parties agree on mutually convenient transportation arrangements.
4. Passengers record time and mileage for each trip and turn in their form (called Request for Mileage Reimbursement) to Access San Joaquin at the end of the month to receive reimbursement.
5. Passengers are obligated to pass the reimbursement amount in full to their driver(s).



## Why My Ride?

1. Use the drivers you know and trust.
2. No advance reservations required.
3. Win-win: The trip is free for the passenger and earns money for the driver!

## Frequently Asked Questions

### Who is eligible?

All passengers ADA-certified through Access San Joaquin's in-person eligibility process.

### What trips may be reimbursed?

My Ride currently reimburses for personal medical-related trips and essential travel of the passenger, which may include shopping and religious gatherings, appointments for rehabilitation, doctors, dentists, dialysis, clinics, and hospitals\*.

### When is the Request for Mileage Reimbursement due?

In order for Access San Joaquin to process the reimbursement in a timely manner, the monthly mileage report must be submitted by the 5th of the month following the rides.

### When is reimbursement issued?

By the 3rd Thursday of every month.

### How do I sign up?

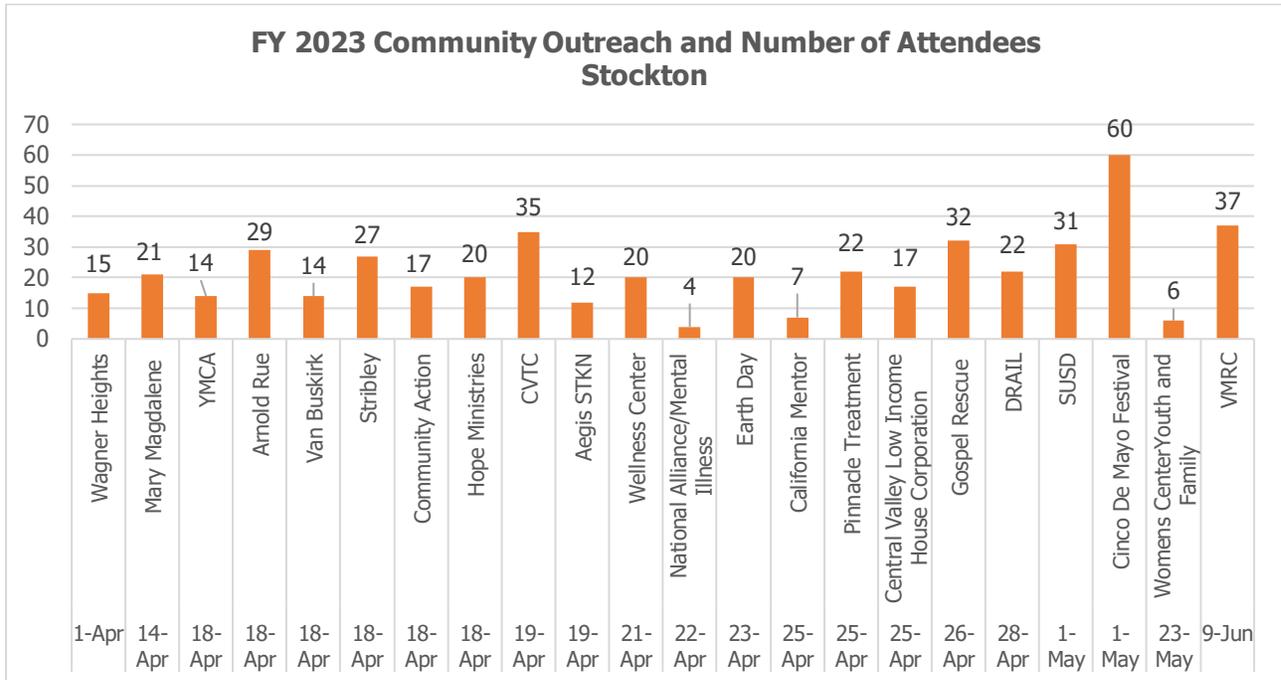
Contact Access San Joaquin!

\* Trips to medical facilities in contiguous counties are allowed with proof. Essential trips to Stanislaus County are eligible for reimbursement regardless of the trip's purpose.

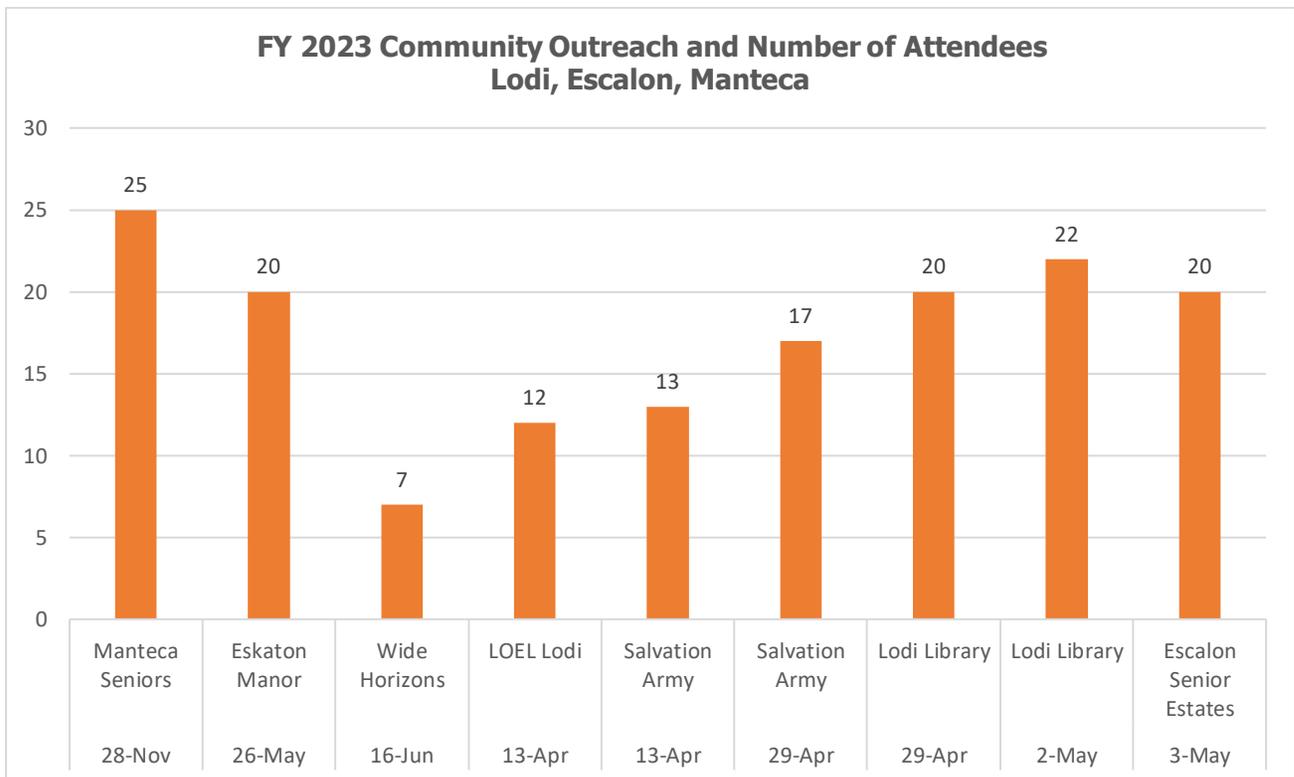
## Community Outreach

During fiscal year 2023, ASJ staff continued in-person community outreach. ASJ used a PowerPoint presentation as a base for other presentations detailing all the services ASJ covers. As COVID-19 restrictions eased, ASJ was able to make in-person presentations. The first in-person presentation was at Eskaton Manteca Manor in Manteca, California, and in-person presentations to participants at Wagner Heights in Stockton, California. ASJ staff also attended the Stockton Mobility Collective Event in March, Stockton Earth Day Festival in April, Stockton Cinco de Mayo Festival and Parade, and the Lodi Library in April and May. ASJ staff continues to look for opportunities for community outreach in all of San Joaquin County.

**Graph 7**



**Graph 8**



## FY 2023 Financial Report

### FY 2023 Expense Summary

<b>SAN JOAQUIN REGIONAL TRANSIT DISTRICT                      CONSOLIDATED TRANSPORTATION SERVICES AGENCY (CTSA)                      REVENUE AND EXPENSE SUMMARY                      June 30, 2023</b>		
<b>CTSA Revenues</b>	<b>Date Received</b>	<b>Amount</b>
FY2019 CTSA Revenue	11/14/2018	\$ 552,774
FY2020 CTSA Revenue	12/16/2019	672,101
FY2021 CTSA Revenue	11/25/2020	633,283
FY2022 CTSA Revenue	11/1/2021	862,765
FY2022 CTSA Revenue	5/30/2023	298,441
FY2023 CTSA Revenue	12/7/2022	963,228
<b>Life-to-Date CTSA Revenues</b>		<b>\$ 3,982,592</b>
<b>CTSA Expenses</b>		
FY2019 CTSA Expenses (10.01.2018 - 06.30.2019)		\$ 346,943
FY2020 CTSA Expenses (07.01.2019 - 06.30.2020)		406,775
FY2021 CTSA Expenses (07.01.2020 - 06.30.2021)		340,994
FY2022 CTSA Expenses (07.01.2021 - 06.30.2022)		351,592
FY2023 CTSA Expenses (07.01.2022 - 06.30.2023)		517,527
<b>Life-to-Date CTSA Expenses</b>		<b>\$ 1,963,830</b>
<b>CTSA Fund Balance, 06/30/2023</b>		<b>\$ 2,018,762</b>

### Financial and Operating Recommendation for Fiscal Year 2024

The financial report displays a balance of \$2,018,762, ASJ has not expended these funds and as the designated CTSA, RTD requested to SJCOG, in a letter dated August 31, 2023; that the 2% off the top of LTF funding that would regularly be allocated to ASJ, not to be taken off the top of the LTF allocation for the next two funding cycles and that the 2% for the next two years will flow to all recipients via the normal LTF distribution formula. This will allow the cities to use their share for any purpose they need. For FY 24 and FY 25, RTD will expend the carryover to fund the CTSA program and services it provides. This initiative has the support from the TAC.

## **CTSA Work Plan Elements** (July 1, 2023, through June 30, 2024)

ASJ has prepared the following work plan elements outline for fiscal year 2024 which forms the foundation for organizational development and the expansion of coordinated services in the region.

- Monitor My Ride ridership and trends. One-way trips increased considerably compared to the previous year, granted COVID effects were in decline and more day programs and activities resumed, however, it is important and recommended to:
  - Monitor closely and validate frequency and purpose of trips per client
  - Monitor Intercounty travel (Contiguous Counties Medical Purpose Trips)
  - Evaluate trips not taken on ADA paratransit services (Subsidy Savings Analysis)
  - Propose and evaluate new program guidelines to ensure adequate use of this program.
- Maintain ASJ website: The website is continuously being updated to reflect the current and updated information about ASJ programs and services.
- Marketing Materials: Update Travel Training, My Ride, brochures and applications and work on ASJ promotional items.
- Continue to conduct outreach to all of San Joaquin County residents and ensure proper coverage to each jurisdiction. Participate in various community events. Report correlation between contacts made at different programs versus actual outreach conducted.
- Continue to update San Joaquin County Transit Center Tactile Maps as needed due to transit system service changes.
- Travel Training to include and promote the use of the Vamos app in addition to the traditional curricula.
- Focus attention on the use of Key Performance Indicators (KPI), monthly statistical data presented at the monthly meetings to monitor ASJ programs performance and recommend improvements.

## **FY 2023 Recommendations Review**

- The Miocar project was part of the previous report recommendations as a potential option for My Ride participants. This program was launched in 2023 with locations in Conway Homes, Grand Canal, and Victory Gardens in Stockton and in the last fiscal year it has not been used by My Ride participants. The program requires individuals to have a driver's license, however, insurance is not required. Some of the barriers identified for the use of Miocar are:
  - Miocar is not ADA accessible, suitable for ambulatory participants only.
  - Not all participants have a credit card to be able to sign up for Miocar.

- Cost may be an issue for low-income participants as bookings start at \$35 per day.

While ASJ supports other transportation options such as Miocar, , Mobility Development would need to make Miocar service accessible to seniors and ADA individuals providing options for individuals with mobility devices.

- My Ride was expanded for all trip purposes in Modesto, Oakdale, and Riverbank as outlined in the previous report and available for all ADA-certified passengers. ASJ recommends evaluating this expansion, its usage, number of participants, etc. and adjust if necessary.