Data Sharing in Transit/Shared Mobility Partnerships

Transcript

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Rik Opstelten
Okay. I believe everybody is now able to hear us in the webinar room. So let me say hello and welcome, everyone, to the first of two webinars that we here at the Federal Transit Administration will be holding this month to promote some learning in our industry around partnerships between public transportation agencies and shared mobility providers. We've learned a lot from the excellent work of the agencies that we've partnered with in the mobility on demand sandbox program. We also, of course, are very glad that some of the lessons of that work have spread outside of the sandbox as well to other agencies. So today we have an opportunity to learn and also next week in the continuance of this series from a variety of colleagues. Those who had taken part in the sandbox as well as others. This kind of knowledge sharing is vital to our goal within FTA to support the field's efforts to innovate in ways that serve both the agency's goals and serve the traveling public and ensure that the benefit of the evolution that we're seeing in mobility spreads to all and is able to serve the entirety of our population and really help us to achieve the goal that drives all we do in this sense, complete trips for all. In today's session, we're going to highlight practices around the establishment of data sharing agreements in partnership between public transportation providers and shared mobility companies. To help us to take on that goal and to learn in this direction, I'm happy to have David Schneider, he's a data scientist in FTA's Office Of Research, understanding our need for data sharing and offer some helpful resources to support those of you who are tackling that challenge. We also have colleagues in the field, Emma Huang is with L.A. Metro's office of Extraordinary Innovation, joined by her partners Abby and Jean Paul Velez of the king county mobility's innovative mobility program to discuss their sandbox projects' evolution in data sharing. We also have Alfredo Torales from the big blue bus who will share with us his story of -- or his data journey, shall we say, which has taken place outside of the realm of mobility on demand sandbox experimentation effort but which has also provided a useful sort of test case in developing these kinds of data arrangements. So these practitioners that are speaking with us today, they really have experience in the trenches and they've learned a great deal that we think will be of a good bit of value to others who would be considering such partnerships or who are now, would be going through questions of data. Lastly, in today's lineup, we have Murtaza Naqvi of FTA's Office of Budget and Policy, and he'll be discussing the tracking of data from shared mobility projects in the national transit

database and how some of that is evolving. So following the presentation portion of today's event, we'll also have the opportunity for questions.

That gives me a nice interlude into a bit of housekeeping notes. So I would note a few things. First our voices are carried to you today through the miracle of voice over IP. If you cannot hear us or not hear us enough, please turn up your computer speakers or headphones or whatever it is that you're using to obtain this audio and to listen in to this presentation. You can utilize a question and answer pod that is on the left bottom side of the screen to submit at any time through today's presentation questions which we will be taking down and hopefully answering following the presentation portion of things. This event today is being captioned for those who need it, located under the presentation slides. We will also be posting within a few days' time a recording of this webinar on FTA's website. The URL has been shared in the notes section of the webinar system which you'll see in the upper left-hand corner of the screen and you can check back there in a few days' time to see the recording and you'll have additional information made available, resources that come from these conversations as well as information about the presentation happening next -- regulations and how to conform to those in the context of mobility on demand type partnerships.

So now that we have those things out of the way, I would like to introduce David Schneider, our data guru and the baton is passed to you, Mr. Schneider.

>>David Schneider:
Let me give a quick overview of FTA for those of you who aren't as familiar with our work. I'll talk about some common themes and challenges and strategies in the area of mobility data sharing and then I'll turn it over to our practitioners. So we are here on behalf of the Federal Transit Administration and our mission is to improve public transportation for America's communities. Within the FTA, our research -- our office of research demonstration and innovation is focused on three areas of improving public transportation, improving safety, improving infrastructure, especially as it relates to working -- addressing state of good repair issues and on mobility innovation, the main topic that we're here to talk about this afternoon. So we've done research and innovative work in these areas with ultimately some outcomes to improve and Foster economic growth, improve transit agency operations and improve the traveler's experience. So let's talk a little bit before we get into mobility data sharing, why don't we set the stage and talk a little about mobility data. If I had been giving this presentation 10 or even five years ago on mobility data, I'd probably be talking about maybe sending this information on commute trips or national transit data on passenger trips or traveler surveys. All that is relevant mobility data but for the purposes of our conversation today, we're talking about information on travel that's collected using digitally enabled mobility devices or services. So that could include information about origins, destinations, trip length, trip route, start and end times, all the sorts of data that I'm sure our practitioners will talk about in just a few minutes. It could include information about vehicle location, speed, directions, sudden braking, emissions, often expressed in latitude and longitude coordinates, smartphones, on board computers and that sort of thing. Next slide.

So we know and some of our other colleagues will talk about challenges in data sharing revolving around competing priorities. There are competing stakeholders who have an interest in data and they all have legitimate needs, but sometimes the needs compete. So we have public stakeholders, mobility occurs in the public right of way on city streets and highways, cities and other public entities have an interest in data in order to monitor safety conditions or traffic congestion or environmental emissions or do some long term planning. Also funding agencies like the FTA or other transit agencies that have maybe entered into partnerships with the private sector have an interest in collecting data so they can evaluate how their partnerships are doing. We also know individual travelers expect that our privacy would be protected. By and large, we don't necessarily want to share who we are and where we are traveling to on any given day, and we know that that can become increasingly complicated as data sharing and data methods evolve and people are able to piece together information that could identify someone. So coordinates and then maybe a map of what businesses are located where and an address book, it's relatively easy to identify who is traveling to what locations at what point in time. We also know mobility providers have financial interest in protecting proprietary information. People are nervous about sharing data that might give a competitor a competitive advantage. We understand that there's been some concerns about the freedom of information act, FOIA, when it comes to sharing data with public agencies who then might be required to turn over that data in response to someone who submitted a FOIA request. So part of the challenge is balancing these priorities. There are additional challenges to managing mobility data. One has to do with the high cost of storing and collecting data over a long period of time. Another challenge has to do with lack of common standards. So different companies may be collecting data using different methods. Maybe data by trip or by driver or by passenger, and it's not always easy to aggregate data from multiple sources, especially if you're working at a city, state or regional level. There's also a certain degree of expertise needed for analysis and visualization. So even if you do have a lot of the raw data, it requires expertise to visualize and manage it and so if your agency doesn't have that type of expertise, you might not be able to take advantage of the data that you were able to share and collect. So our practitioners will go into more detail on some of their strategies that they're going to talk about, but I'll give you kind of a high level overview of some strategies people are talking about when we're talking about mobility sharing these days. So we talk a little about lack of common standards, well, there are some standards out there that are available. Some have been around for some time and others are relatively new. The standard that many people are already familiar with is the general transit feed specification and then GTFS real-time which provides information about transit routes and location of transit and historically that's been like bus and rail but the outgrowth of that has been the general bikeshare feed specification. Currently around 230 bikeshares are using this specification. More recently there's been the mobility data specification developed in 2018 to track vehicles I believe -- around 50 cities are using that and that may have changed in the last couple months since I read that statistic because these are changing. So we're encouraging standard data specifications, not necessarily endorsing any but those are three that we know are out there. Developing data legal sharing agreements is a practice that could be a good practice, and some of this is occurring at the state level or at the city level or at the local level. And there's

various ways to do that as well. There are big data repositories managed by third parties. I'll talk about one in just a sec called the secure data commons that we're involved in. This could be especially helpful if you are interested in data outside of your particular provider or city because I would thick repositories have an ability to learn about what else is going on so you could maybe benchmark your work that's going on in other cities or states. Finally, there are transportation planning tools that people could leverage. I mentioned the secure data commons. We can provide additional information if people are interested. It's a platform that's being managed by the intelligent transportation systems joint program office at USDOT and it's something that FTA and other modes are participating in. There is data right now on WAZE and connected vehicles and it's an option that we have offered out to the folks that have applied for our innovative mobility initiative grants to use to store data. So it's a repository where you would get access to by signing a data sharing plan, it provides very secure abilities to ingest data and share it only with the people that are agreed to share it with and then to export it. Another FTA resource that we are supporting has to do with the public data access policies and public data management plans. Public data access is a whole webinar unto itself, over $25,000, you have to comply with it, if you're not, putting it out there as some practices that could be valuable. In particular, one of the requirements is to do a preliminary data management plan, and the notion behind that, you take time to think about how the data will be organized, what kinds of data you're collecting, the format that you're collecting it in, who would be the owner or the steward of the data, what kind of access levels it would require, what policies you would have for review service redistribution, and policies for data storage collecting and publication. So the notion behind the data management plan is to think about all these data aspects at the onset, so that you can have a more structured data program going forward. Then there are some additional resources, I'll mention one here and one that's not on the screen. So there are, of course, our transit cooperative research program and there are a number of different reports about new mobility infrastructure and mobility data. This relatively recent up with has information and case studies on public transit partnerships with companies including information about what data was collected and the range of data partnerships that were involved. We also sponsor the shared use mobility center and although it's not on the screen, we have a report called objective driven data sharing for transit agencies and mobility partnerships, a white paper that goes into additional detail. So those are some of the things that we've been thinking about and some of the resources that we've been working with on this topic and Rik, I'll turn it back over to you.

>>Rik Opstelten:
Well thanks very much, David. We appreciate the sort of background in how we have understood, as you said, it's been a very raptly evolving landscape and one to which FTA has tried to develop some understanding and to facilitate some learning so thank you, by the way, to reference to some of those resources. They've attempted to sort of consolidate and provide useful resources that allow people to understand what are the data points that you might need to have in your partnerships, what's the best way to go about trying to get to the information contained in that, and how might you arrange for those kinds of data to be provided in a way that everybody involved in the project can

be comfortable with. So if those are our main challenges, let's now hear from some in the field involved in answering those questions and working those issues through. Our friend from Los Angeles, Emma, if you might tell us a little of your story.

>>Emma Huang:
Sure. Thanks for having me. I am just going to very briefly provide an overview of what our pilot is. So we with the funding from the FTA were able to partner with a company called VIA to provide first and last mile on-demand shared ride to select transit stations, and so the company we partnered with is VIA, so we entered into a contract with them, but I'm mostly going to focus on the process that we went through to reach a data sharing agreement with VIA. So our contract was finalized at the end of 2018 and we launched our service in January of 2019, it's a 12-month-long pilot. I think it's really important to speak to the power of goal setting and how one goal for LA Metro and king county Metro and Sun transit, we wanted to partner with a TNC and one of our explicit goal was to share data and a compelling level. So keeping this goal at the forefront was really critical for us because we actually initially partnered with Lyft on the grant, and when we were trying to hold true to this goal of reaching a very compelling data sharing agreement, we decided that we ultimately had to substitute our partners in favor of an entity that was more willing to engage and to share data at a level that we thought was necessary. And so just the same way our service planning team under operations department realize on data to make decisions on where and when and how often to provide our bus service, we really had the same intent with our partnership with Via and what we wanted to come out of our data sharing agreement. So in terms of actually setting up the pilot with Via, we had established six goals that we wanted to achieve for our service. So an example is we wanted to improve mobility by increasing ridership for the agency, but we also wanted to provide a reliable and high quality customer experience. And so based on these six goals, we established certain KPIs that would help us inform whether or not we were meeting those goals. We get the question about how are you measuring success, so the KPIs were a necessary tool to kind of share out the progress that we're making on this pilot. But in order to know those KPIs, we really needed certain data variables from Via that would help us measure them.

So I'm trying to go to the next slide. Great. So in pursuing this data sharing agreement with Via, we basically started by thinking about all of the possible data variables that we would need in order to measure whether we would reach our KPI. This ended up thinking about the complete trip experience and what variables that describe that experience. So our initial position actually included a list of data variables and corresponding definitions and our ask to Via was to have this on a trip by trip level. But negotiations have to take place and that's understandable, but I think what kept us on track to actually get a very robust data sharing agreement is we utilize something called a term sheet that had actually codified big picture terms even before we had begun scoping out the contract. So even though the term sheet was not a legally binding document, it was understood by both parties that Via had intended to share data with us at a compelling level and had even spoke to some of the data variables that Via would agree to share with us. So certainly through the negotiation process, there's various protections that are put in place to allow Via to reach a level of comfort that any specific

data variables that they consider trade secret are properly protected and that metro is also receiving enough data, both the type and frequency of data that we can really understand how the service is performing and evaluate it, but that we're also all protecting PII. So the data that we actually get from Via and how we use it, it's really a product of a variety of tools, so we have an NDA, we have a contract, we have a scope of work and then there's additional follow-up conversations that we have with Via where if we realize after the pilot has launched that there's a specific variable that would be very useful to us that we have that conversation with them to ask if they would consider including that. So it's very difficult to have a really ironclad data sharing agreement before you even have a pilot on the ground. In this case for us, it was the first time we had done such a thing, and so we had to definitely allow for a level of flexibility and iteration and I credit the effort for working with us on that. But what's resulted is that we have a set of 26 data variables that basically describe the service on a trip by trip level. That information on a trip by trip level is marked trade secret but once we aggregate it at a weekly level or higher, then we're able to publish that information. And then on top of that, we get a series of data variables that Via provides over and above those 26 variables that they provide on a per-week level. So the tools that we use actually receive that information from Via, they take the form of a dashboard that offers summary statistics that are automatically populated for us on a weekly basis, and then a data warehouse that actually stores the raw files for us, so this warehouse is protected by VPN, it's only available to a specific list of individuals with credentials but LA Metro is basically able to access that whenever we want, it's updated on a weekly level. So just some considerations that I think need to be taken when crafting a data sharing agreement over and above the functionality of the data sharing agreement, I think these important considerations need to be made on a policy level so for example, in terms of whether or not your contract allows you to own the data or license the data, I think of this as an area that metro, LA metro is still evolving on and depending on who you talk to, you can get different answers. For us, our terms allowed us to have a perpetual license to this data, for the aggregated data, we have to delete it after five years. I think for this one-year pilot, that those terms are fine. I think that metro would consider different terms for a service like micro-transit where it has a larger scope and it's a longer pilot, then perhaps we should own that data, but in terms of this 12-month pilot, I think licensing is fine. Public records was a huge concern for us, we wanted to make sure that we would be responding -- we would be able to respond to the public records request, but not provide any information that had sensitivities, whether it's PII or trade secret information. And so we haven't gotten any to date, we have built into our contract that metro will respond to PII but will let Via know about that, so it's a good partnership in that you're keeping the TNC in the loop of when you get something but in terms of metro, we're definitely following the policies. The last thing I wanted to mention is just trying to build in the ability to iterate and adjust into your scope. I think it's great that the FTA MOD sandbox kind of encourages and allows us to do that, but I mentioned before it's really difficult to have a rock solid data sharing agreement in place prior to having service on the ground, so allowing for the ability to adjust that agreement and to add to it as you learn more is really critical. And that's all I have.

>>Speaker:

All right, thank you so very much, very useful information there. Abby, would you like to follow on with your own story?

>>Speaker:
Absolutely. Thank you, Rik, thanks, Emma, for setting us up. So here in the Puget sound, our local deployment is a partnership between the Seattle Department of Transportation, the FTA, and Via, as part of the FTA's mobility on demand sandbox program. Our project is called Via to transit, and subrecipients to LA Metro, they're testing the viability of the partnership with the transportation network company to increase access to transit in two different markets in mind. We've got the LA county deployment and Puget sound deployment. I'll spend some time giving an overview of our Puget sound deployment because it does differ slightly than that in LA county. So similarly, however, this project here in the Puget sound provides first and last mile shared ride services connecting with transit through a 12 month pilot deployment. I mentioned our partners already, with a designated fleet of vehicles for Via, and Via to transit, it's deployed to customers in five desecrate zones. Stations are served by king county metro bus as well and within these zones, within the zones that are in the city of Seattle, the service is available Monday through Saturday from 5:00 a.m. until 1:00 a.m., and on Sundays from 6:00 a.m. until midnight, and outside of the city of Seattle, services available at peak times between 6:00 and 9:00 a.m. and 3:30 and 6:30 p.m. So how does it work here? People can get picked up after they request a ride, they can expect a pickup time within about 10 to 15 minutes. They'll walk up to five minutes to meet their shared ride and at one end of their trip it must be a link light rail station, and the app in the call center will guide customers through the booking process to meet this point. People can pay using their ORCA card which is our regional fair pass, Mobil ticketing process, or credit or debit card. Through the ORCA payment, if that's how a customer pays, passengers will get a free transfer to bus and light rail, if payment is made through transit GO, there is a free transfer to bus. So we have, in designing this pilot, identified four overarching goals. We aim to improve mobility by expanding access to transit, test how to develop a partnership with a private sector transportation network company, broaden access to transit and inform best practices and FTA guidance for public-private partnership in this space. And as Emma mentioned, data is really key to this. We need data in order to understand how our pilot has performed against our project goal. In our evaluation, the project team will utilize trip reports, user surveys, focus groups and customer comments to get at the effectiveness and efficiency of our pilot service. Changes in travel behavior with respect to fixed route transit and understand who's benefiting and who is not. Our project uniquely, I think, as part of the mod/sandbox program includes a really robust kind of structure of independent evaluation, there's independent evaluation at the FTA level, as well as independent evaluation at both region levels. and I think key in the kind of access to data conversation is a conversation about making sure those independent evaluators also had access to the data they needed to perform their work and meet our project goals.

So I will turn it over to my colleague, my project partner across agencies here, Jean Paul Velez, to talk a little bit more about data sharing.

>>Jean Paul Velez:
Thank you, Abby. So I guess where do we stand now that we've been running the service for about six months? I would say that big picture, we're doing great, I would say, if I may say so myself. We've had steadily growing ridership and all the way six months down the line, we're completing around a thousand rides per day on weekdays on these five different locations and we're achieving the target level service goals in terms of wait time and travel times we had set for the service in the beginning. You can see a little bit of that trend, Abby maybe had a slide slowing the larger ridership trend. You can see the growth in ridership over a two-month period. But to come back to data, I would say data has been a central tool for how we manage operations, now that the service is on the ground, and also for how we leverage this pilot into a growing know-how in expertise for transit in terms of first mile services. Here we are looking at the dashboard Via provides us which is a great tool to get a snapshot of a range of key performance indicators, from ridership, the level of service, rides that can or cannot be booked, and we see here on an aggregate basis, giving a certain window of time and we can also filter the data from a few different perspectives. This is one of the main tools we use in our checking calls to Via to see how the service is doing, how to improve it, et cetera. We also negotiated to get the full set of data, so here what we see is the dashboard that we at King County metro built for ourselves to look at the Via to transit service. And this dashboard combines both the data that we get from Via and then the data that we get from our regional fair cards, which customers use to pay and, therefore, we can assess other aspects of the service use. So in the dashboard we see things like the hourly break down of demand, we see rides, hailing type, smartphone versus the actual call-in service. You see a geographic distribution of the trips on the right, then we can also click in and look into each of the five different hubs and see the trends for each hub in particular. Since we also have all the first/last mile services at King County Metro, our dashboard actually covers both Via and those other services. So what we have here is a tool that allows us to compare the different services from the broader sense range of KPI. So we look at productivity, wait times and travel times, and we also look at percentage of reduced rides. We can see for each of the services that we're running, one represented by each color green, blue and yellow, how the different services are performing. So again that management I was describing we can do with the Via dashboard, we can also look at here, and we can say, for instance, to our other provider, how come Via has a smaller wait time and how can we actually get there, and when the provider is saying, well, this is what it is, we can actually say, well, no, we actually have evidence on the ground that this can be done. So I think this allows for, again, a stronger management of the whole suite of services that we are offering, and I think that will be very powerful for improving services for our customers. In this next slide, I'm showing now something that we can do when we have access to the raw data. What we're able to do here I think is very neat and the onset of something very exciting. What we have on the right are analyses of how first/last mile services has improved access to jobs versus our regular fixed routes network. So here the warm colors, orange and red, signify an increase in the number of jobs that customers can access within a 60-minute commute due to the rollout of Via. And what we have on the right is our peak AM trip origins. The higher ridership derived from those locations. As you can see here,

besides those orange and red areas that we actually see the higher number of trip origins. Here on this other slide, I'm showing the services we run, not Via, and we see a similar trend, once again we're seeing that an area that we have improved access most significantly is where we see the growth in -- or the higher number of trips. So it applies both for Via service and also for our ride-to services. So again, this is just the first stab at this, but one that over time we think can build a very effective tool for us to plan services, for us to monitor performance so we can further develop this tool and actually apply it in a set of locations to better kind of hone into something that is useful for all of us in this industry. Thank you.

>>Rik Opstelten:
Well, thank you and we really appreciate the way in which you dove there into some of the practical implications to operations that are affected by your ability to have the kinds of data that we're discussing here. I was about to put a note into the question/answer here. For those of you for whom some of those beautiful graphics were not necessarily well visible because of their size, I apologize but we have to have captioning at the bottom of the screen, I'm not really able to re-size the slides very much in the webinar session to accommodate your ability to look more clearly at that, we will post the slides to the website listed in the left side note section of the screen so you'll be able to look in more detail at those. So my apologies for anybody who wishes to get more of that, we'll just have to ask your patience for a few days before they're posted online. So the group of folks you just heard from were participants in the FTA's Mobility On Demand Sandbox program. Our next speaker, Alfredo Torales from big blue bus, we also want to invite that perspective into this discussion as to how in Santa Monica, those kinds of conversations are taking place that have led to, again, new and innovative types of services. So Alfredo, the floor is yours, sir.

>>Alfredo Torales:
Thanks, Rik. I don't see my slides here.

>>Rik Opstelten:
Sorry, I will load those in a moment. Of course there's always a technical difficulty but we will get those up momentarily. What I'll do in the meantime is, there have been a couple of questions asked from the audience about things like how do you measure on-time performance. Could I ask those of you who are getting into the experiences of figuring out how do you set up metrics, if you'd be willing to speak just a moment about how you have set some of those measurements up while I load the slides here? Any of our previous presenters?

>>Emma Huang:
This is Emma from LA Metro. In terms of measuring our on-time performance through Via, which is a great variable to think about and we tie it really closely into -- it's not just a reliable trip experience but is it a good one, is we were thinking about how long someone would be willing to wait for a TNC, but a TNC that's going to connect them to transit or they've already gone off transit, so we basically set wait times for a target of 10 minutes or less, and so what Via is able to do is to show between the time that an

individual requested a ride and a time that they actually pick them up, we consider that time to be the amount of time they were waiting, and so Via is able to report back on every trip how long an individual is waiting for a ride. And so we then look at on average are they meeting this 10-minute-or-less threshold. I don't know if King County Metro and Sun Transit want to weigh in here.

>>Speaker:
What we've seen through our work with Via is that we can also track cancellations, so when the wait time starts to exceed 8 and gets to 10 minutes, we see like a large big chunk of cancellations of the trip request, and then we would get to 13 minutes, then we see a higher level of cancellation of the trip, so that is both to say that, I guess, to some degree we had a good sense of where the target level should be but also the power of actually looking at this data in that very detailed way to understand how customers are actually behaving vis-a-vis the offering we have for them.

>>Speaker:
Thank you very much for the answer there, guys. Again in the interest for allowing the technical side of things to happening in the background and keeping the information sharing going, there's also been a question about how those who utilize wheelchairs are able to take advantage of the services that are being discussed here. We will be speaking next week more extensively about the requirements that apply in terms of Americans with disabilities access as well as Title VI and drug and alcohol testing in a webinar session that will be exactly one week from today, but I wonder if our presenters wouldn't mind speaking just briefly about how your wheelchair accessible services are provided.

>>Emma Huang:
Just very briefly, for LA Metro's pilot, extra accommodation, they would either toggle a button within the Via app to request that or if they're calling through the call center, they would just indicate that they need that extra accommodation, and so Via does have drivers who have wheelchair-accessible vehicles and do have extra training, and the targets that we set for those rides are the same targets that we set for the ambulatory rides.

>>Speaker:
This is Abby. With respect to data, King County metro and sun transit are also able to look at the wait times for wheelchair accessible vehicle requested rides, add and while our targets are the same as well, we do see a small -- higher time for wait time for wheelchair accessible rides, however, what isn't clear, because drivers assist passengers in loading the vehicle, is whether that is because of a difference in actual wait time or if it's a difference where the clock starts so we have to dig a little bit deeper in that collection effort.

>>Rik Opstelten:
If there are any other questions that the audience would like to have answered, we do have like another minute or so it will take for this to load. So I'm opening now the

opportunity for the audience, if you have questions, please enter them in the Q & A box in the left-hand bottom of the screen. No? All right. Well, I suspect then -- see, the interesting thing about technology and about experimentation is that it requires a certain level as some of our presenters have said earlier resilience and adaptability. So we have demonstrated that today in this moment of getting ourselves back on track with the presentation, which we will be momentarily. In fact, here we are now hopefully able to load up the slides for Alfredo to continue with his presentation. I apologize, everybody, for the difficulty here. But again, what is life if not requiring some adaptability. All right. There you are, Mr. Torales, carry on!

>>Alfredo Torales:
All right. Thank you, Rik. Since this is not one of the projects -- I'll start with some background. So the mobility on demand every day program or MODE for short is the city of Santa Monica's service for people 65 years or older or 18 or older with a disability. The rebrand to MODE was significantly altered by the use of a TNC to provide the services. Lyft currently provides 90% of MODE's trips. The last 10% are provided by MB transportation who utilizes a fleet of city-owned vehicles to provide services -- to residents and mobility devices or those who request additional assistance. In terms of program rules being it's very similar to many local transportation programs out there that serve seniors in terms of eligibility, hours and service areas. So how did MODE come back? Back in 2017, Big Blue Bus staff put out an RFP seeking the services of an on demand transportation vendor that could provide our residents with a better ride experience so the goal was to directly address the constraints of our former program. So for example, they can now provide many more trips within the same budget and that's of course because of Lyft's extensive fleet and its low cost per trip to operate, customers can now book trips on demand and no longer need to reserve a trip days in advance, and MODE allows residents the option to use the Lyft app to book the trips directly and they have the option to pay with credit cards, so to date, we have received overwhelmingly positive feedback from the senior community here, many have told us that they had given up on the old dial a ride system because they could never get a seat on one of those vehicles. On the subject of data, we had a pretty good sense of some of the challenges and concerns that a TNC would have in responding to an RFP for this type of service, so, therefore, the goal in the RFP in terms of data was to obtain enough to be able to manage the service to meet minimum requirements and to ensure that they could do business with the city. After negotiating a final contract with Lyft, we ended up with an agreement where Lyft would provide us on a trip level an itemized I.D. number, pickup and dropoff locations at the trip level, trip duration and trip distances. Earlier this year, we found the need to ask for better data to amend our data sharing agreement. As I mentioned, MODE was very popular and staff projected continued growth would lead to exceeding budget in subsequent years. We organized a stakeholder group made up of members of the senior disability commission and other city staff to outline the priorities of the program moving forward, so based on those priorities, the group developed recommendations for fair and program changes that would ensure mode could be financially and operationally sustainable for years to come. So among the priorities of the stakeholder group was for any proposed change that staff would put together to -- they would need to consider the needs of the more socially and

economically vulnerable senior residents to analyze what impacts any proposed changes might have on any segment of our population, we reached out to Lyft on amending our data sharing agreement. Specifically, we asked for the ability to personally identify each rider by trip. We could then take trip activity by rider and compare to the data that the city collected, such as household incomes, self-reported on their MODE application, and estimate the impacts of any proposals. Back and forth between our City Attorney's Office and Lyft but came to an agreement and can now access this data. Ultimately the changes led to a fare increase and a new fare structure that introduced a new low income category for low income members among other program changes. As these changes went into effect just last month, early results indicate the changes are meeting their desired effect, so for example, we don't see the fare increases impacting low income residents' usage of the program any more than non-low income residents of the data, in this case it really helped us inform major policy changes. Additionally, the new data agreement will help us better audit and enforce some of the other program rules. So where do we stand now? We now have a way to determine by resident which trips they've taken and how many they've taken each month. As far as other trip level data, there's been no changes to that. At least for us, continued data related challenges include NTD reporting. We've been reporting these trips since November, yet we were recently notified about a reporting issue so we are taking a look at that and working with Lyft and NTD to get those results. Having a bit more data would be helpful to investigate at least some of the more serious concerns. For example, when a customer feels that they are routinely no-showed, and drivers are reporting that there's nobody at that location and somehow they're never connecting, things like that would help us get to the bottom of at least some complaints. So that's what I have. Thank you for the time.

>>Rik Opstelten:
Thank you for the information and for especially, Alfredo, the reference to NTD, which is a very good segue to the opportunity now to hear from our friend Murtaza with the NTD office here at FTA. He'll take a few minutes to explain to us sort of how NTD is approaching some of these questions around the data that arises and the information and the counting that arises, if you will, from these partnerships with shared mobility types of providers. Murtaza, before you continue, I just want to address one thing that's been coming a lot across the question and answer. There have been many questions to do with equity and accessibility in the provision of the services being described by our presenters today. I will -- if we have time at the end of our presentation from Murtaza, if we have time to address some of those, we will. I'd like to prioritize questions that have to do with the question of data in today's session, as that is our topic. I would very much encourage you, however, to join us for next week's presentation, which will be specifically about issues of compliance with the Americans with Disabilities Act, Title VI of the civil rights act, drug and alcohol testing, and related issues. So please, if we're not able to get to those questions today, do carry them forward to next week's presentation and join us then.

So with that, then, Murtaza, we grant you the floor, sir.

>>Murtaza Naqvi:
Great. Can you hear me?

>>Rik Opstelten:
Yes, absolutely.

>>Murtaza Naqvi:
All right. Thanks, Rik, David. It was really nice to hear from LA Metro and Sound and King County to really see how data is empowering them to evaluate their performance in terms of customer service as well as kind of planning for the service. I'm actually really excited to talk about, today, how this data can be used for grant dollars. So, you have a contract with a transportation network company for on demand or shared mobility service, you may be able to include this data for NTD reporting. So currently, NTD captures its data by mode type service, so title 49 of the United States code section 5302 states that public transportation must be regular continuing shared ride, surface transportation, services that are open to the general public, right? We know that definition. We, of course, use that definition to figure out what's eligible for an entity for inclusion into the datasets used for apportionment of formula grants. So under this definition, taxi service, this historical mode we looked at for taxi was not considered public transportation. So again repeat, taxi service was not considered public transportation. However, agencies may contract with the taxi company to provide, quote-unquote, overflow capacity for their demand response service. And these arrangements, what we see is the request for the ride is dispatched through the agency's demand response service and the taxi company provides the vehicle for the demand response ride. So again, the entity we currently capture that as demand response taxi purchased transportation as this type of service. Agencies, again, reporting to the entity with full cost contracts with the TNC company -- sorry -- with a TNC for, again, on demand shared mobility ride service may be able to include that data. So of course it must first meet all the criteria as codified for public transportation. And here we go, here are the definitions. Again, this is the current regimen, so if you have that contract, you will be able to report those rides as demand response taxi purchased transportation. What type of information do you report into NTD? So if the shared mobility service meets the reporting requirement, you will report financial service and asset data. The level of detail you report will depend on the type of reporter you are, but ultimately with your contract at TNC, we are looking to link passenger trips, vehicle revenue miles, vehicle revenue miles, passenger fares, operating expenses, sources of revenue, and a subset of information regarding the assets used to provide the service. For folks who are engaged in full-fledged asset planning, we -- when I mean subset of data for assets, we're really just looking for a really pared down inventory of assets. Those can be -- those, we'll discuss later. FTA, though, is very interested in capturing just the data that's the data specifically emerging from TNC rides. So in this upcoming report year, FTA is planning to update the entity reporting system to now designate two new types of service. In addition to directly operated and purchased transportation. Contract that engage either TNCs or taxi companies will now be

captured into newly aligned/realigned types of service. What FTA has proposed is that TNCs and taxi services both report in or service provided by those types of service be aligned in terms of the data that's reported in, but that we capture those as a new-type service. So in the upcoming year in report year 2020 into the NTD, agencies will see TNCs as a type of service. Ultimately, this table presents kind of what the reporting system will specifically be defining as these modes. We are currently in development of these updates. So for folks perhaps interested in knowing what types of data that we really are going to be looking for. The big thing, of course, is the unlinked passenger trips, the vehicle revenue miles, vehicle revenue hours, these are your service -- these are supply side characteristics, so I guess we want both supply and demand of those rides. VRM, of course, VRH, we capture by the mode, so this will be aggregate data needed, depending on the type of reporter you are and the type of funding you qualify for, vehicle revenue miles will have a different unit value, but nonetheless, this data emerging from shared mobility can be captured in the formula. I do want to clarify, though, that pilot projects currently cannot report into the NTD. So as some of these big entities that I was excited to hear about today, perhaps ink full service contracts for their demand response service with TNCs, we look forward to seeing that dataset expand, but until then, pilot projects kind of remain in this space of not being eligible to report into the entity until it is regular service. And finally, let's talk about asset data, because asset is a big deal right now. In some cases we know that your contractors will not be using a dedicated fleet, so as such you will report into the NTD a representative sample of those vehicles used to provide service. And also we're not interested in your spare vehicles in this case, so in the future, as folks again report in their TNC partnerships, we will be interested in just a representative sample of those assets that provide service and really that's that for the asset data. I'll close by saying NTD right now has provided guidance for operators in this year's report manual. I don't have this link but for folks who are really familiar with our documentation, the entity reporting manual has built out this guidance. I will get this updated link to Rik. There we have a flow chart for folks to work through to examine if their data is eligible for the entity.

>>Rik Opstelten:
All right, Murtaza, thank you very much for that update. It's good to show some of the ways in which we're evolving our understanding of data. I would like now to again invite everybody who has a question to please go ahead and enter those into the Q & A box on the bottom left. This is the time that we have set aside to get to your questions, and while that's populating, I would just first like to make a reference to some comments made earlier about the sharing of resources. So there is a website which I've put into the note box on the left-hand side on information where this webinar series is shared, we will post also resources that had been spoken of today that would kind of tie to this presentation. One other thing we will connect to specifically there is the ability on demand learning center, a resource that has been developed via a partnership between FTA and the shared mobility resource center that we have available for public use. Case studies, documentation of a variety of kinds, as well as the document referenced earlier by David, a white paper on the development of objective based data sharing arrangements. So please do look back to that site for additional information that would provide some deeper dive, if you will, into some of the material spoken about today. So

it does look like we've had a good number of questions coming across the screen while I've been able to save those little bits. I do want to -- Murtaza, if you're able to give a little bit of additional information, we've had a question about how regular service is defined. You mentioned that -- service is not currently reportable in the NTD. Is there a parameter by which regular service is defined in the way that you discussed?

>>Speaker:
Rik, can you hear me?

>>Rik Opstelten:
Go right ahead.

>>Murtaza Naqvi:
When we talk about defining regular and continuing service, what we're referring to is service that operates on a schedule basis, specified hours perhaps during the week and the weekend, what we really want to be able to exclude out from regular services, that's non-regular, that's what we're saying is anything that operates on an ad hoc basis. Special event, for example, are not regular and continuing. Along the same line, time-limited pilot projects are not considered regular and continuing either.

>>Rik Opstelten:
Okay. Thank you for that. And could you remind us too, Murtaza, when will the new provisions you discussed become effective in the NTD? ?

>>Murtaza Naqvi:
Okay. So let me recap this timeline. Effective immediately, folks can report their shared mobility partnership rides as demand response taxi purchased transportation. The acronym for that of the day is the DTPT. You can report that. In report year 2020, our full intent is to have developed out the new types of service. Which would be the TN C-type of service and the taxi-type service. For those reporting, it will be -- the most important takeaway, if the data you provided under the DTPT mode and type of service historically will remain the same. What we've effectively done is eliminated DTPT and the mode under which all these rides are captured will be demand response, and agencies will need to be, again, starting in report year 2020, pay special attention to the type of service that is being provided.

>>Speaker:
Okay. Thank you, Murtaza, for the explanation. I'm afraid there have been many questions pointed in your direction, a great deal of interest in how this is evolving. Could I ask you as well if there's any impact on the source of funding that supports the provision of a service into whether or how it's reportable in the NTD?

>>Murtaza Naqvi:
Great question. The rule of thumb for NTD, if you report into the NTD, you are hooked in because as a transit operator, you are receiving funding from our bigger programs, 5307, you know, the main sections of 5311, from those two programs, you report in to

the NTD. You not only do provide the data by the service that's funded by those sources, you must provide data on all of your public transportation. So for those who are already in the NTD that just means that you need to now report your shared rides emerging from your shared mobility service into the NTD. Now the moment -- so for folks, I imagine there's a universe of folks perhaps listening in today that want to -- that aren't in the NTD, they probably are interested, though, in participating in these types of contracts. They should anticipate having to enter into a data agreement with their contractor, or their contractee, in order to get not only the data needed for the report, but to be ready to engage with their contractee. To ensure validation questions or answers for the report year. All of the vehicle revenue -- all the vehicle revenue miles emerging from shared mobility eligible for the NTD, of course are captured for 5307, are captured in the bus tier, for 5311, it will just feed in to anywhere that requires the appropriate vehicle revenue mile field.

>>Rik Opstelten:
Thank you, Murtaza, for addressing that as well. That hit on other questions addressed by other members in the audience around ways in which these figures enter into the data calculations. You mentioned just a second ago the question of ensuring the validation of entity reportable data is included in the provisions of agreements between agencies and their partners. Could I ask our practitioners who have spoken today, have you any particular experience or advice or thought around how questions of entity reporting did or didn't enter into your data negotiations with your partners?

>>Emma Huang:
This is Emma Huang from LA Metro. NTD reporting actually didn't enter into our negotiations with Via but I do think it's a huge topic that is discussed internally in our agency, especially because, you know, LA Metro, we also provide bus and rail and so there's a lot of conversation for what kinds of impacts to bus and rail funding would any sort of on demand service be. So I think we're very eager to understand, you know, if we're piloting a three-year micro-transit pilot which will utilize our own drivers but utilizing some private providers technology, whether or not that's eligible has a lot of implications for how our service planning and our bus and rail people -- whether micro-transit is something they want to support or not.

>>Speaker:
Roughly the same answer here. Like it was not going to take into account -- we were just looking at it more as a pilot and actually we're paying attention when the changes were suggested this year about these new categories in the NTD reporting but we still do all of our first/last mile work and experimentation through pilots, so we just understood that they would not count.

>>Speaker:
Rik, if I may, I was very happy to see that there are some very nice suites of data dashboards and performance metrics emerging from these mobility on demand projects for folks again engaging in -- who really look to engage in the full cost contract specifically with Via, for example. You're halfway there. There might be some key

definitions that will require alignment in order to expand, perhaps, the existing dashboard. I'm thinking perhaps unlinked passenger trips or ways perhaps folks are calculating types of mileage. These, of course, can be clarified, entity-specific questions, we can take to our validation analysts, but I think -- I feel extremely positive in the progress that's really emerged from the on-demand projects.

>>Rik Opstelten:
Information change, knowledge exchange, growth of experience is the backbone of the projects that we're doing, and kinds of collaboration and support, this webinar and much of the work that we pursue in trying to you support these kinds of innovations in the field so I appreciate that, Murtaza. You spoke about cost, and there was a question that came across the chat box, the question pod a few minutes ago about the difference between the cost of a trip and the amount charged to an agency for that trip. Could you perhaps explain what of that is reported considering also how many of these arrangements have to do with a subsidy that's provided to the contractee agency and how that question of cost relates to the reporting?

>>Alfredo Torales:
Great question. The distinction here is that I'm not -- I need to know the costs to implement -- by the agency the cost to implement this contract with the provider. Agencies may leverage other types of programs to reduce their cost on the ride, vouchers, perhaps, which would not be considered public transportation. That being said, from the NTD side, I am interested in the full cost of operating the service in relation to the contract. So what I guess I really want to say is I need full costs of service, assets, resources used to implement that contract, and then agencies will further down in reporting net out any of these other expenses as needed.

>>Rik Opstelten:
Thanks for that, Murtaza. In the interest of being able to answer other questions and frankly to maintain my friendship with Murtaza, I will ask that any further questions -- because we've had quite a lot that have come across the Q & A pod that are directed at the general question of NTD. If you guys wouldn't mind to suspend your questions in this forum for the moment and perhaps direct your questions to the validations and to the staff and the information provided by Murtaza on this slide now showing that would allow us to get into some of the other questions that are coming across as well. It's good to see there's a great deal of interest in this. We'd like to offer the best answers possible and that may actually be best through email communications. So let me turn then to another question. I'll ask this of our presenters in the field. If you'd think with us for a moment about the kinds of barriers that you see being in policy or regulation to being able to conclude satisfying agreements for data sharing, what sort of things have you come across, what would be your thoughts about some of those barriers that could perhaps be addressed to ease those kinds of agreements?

>>Speaker:
We can take a crack at it here in the Puget sound area but I think part of our answer is context-based. So we have very stringent kind of privacy laws already here that, you

know, can -- on the one hand I guess is what I'm trying to say because we also have very strong public records laws, and so navigating those as the industry is changing is very difficult. So the way that we structured protections to the data that we receive are based on interpretations of kind of older regulations, and we're trying to project to the new technologies in place, but I think we need to kind of build kind of stronger regulations for transit and/or government to extend possible -- to have access to that data without again exposing people's privacy. There's a conversation that everyone needs to have and we all need to sort out, so to some extent that speaks to emma before, which that we all need to figure out the balance and not from the onset rather it's an -- process that highlights the value of the pilots to evaluate how we did it this first time and how we would like to do it moving forward. So there are -- we are thinking there are new possibilities for adding what could be considered PII to include origins and destinations of people's travel that currently are not -- and changes to regulations that could give us an even stronger position to protect data while also being able to do the analyses that we want to do.

>>Speaker:
Without kind of policy level protections in place in addition, it would be difficult to kind of replicate and get the data for planning purposes if the project design were slightly different, so as Jean Paul alluded, the interpretation of the law would provide that protections are in place in the current project design, but there might be creative solution to be discovered through another third party kind of data warehouse or some other kind of arrangement with a different --

>>Emma Huang:
I think it's a really big topic, the topic of privacy, and as we explore new modes and use new technology, it's just the opportunity to get more data, but I think it's really important to get from a public agency perspective, to always remind our audience that we really just need a level of data that allows us to make good planning decisions. And so I think that the narrative is really important because I think one of the kind of long-standing narratives that a lot of the private providers were relying on was just saying, you know, well, privacy is a really big concern, and privacy is a huge concern for public transit agencies and it always has been, but I don't necessarily think that we should allow to kind of be exacerbated or exaggerated as has been. And so just always kind of reminding our audience of what we need this information for, I think is a good way to kind of anchor the conversation, and we also don't want kind of that PII level information but we do need to know how people are utilizing the service and where they're going so that we can just constantly kind of iterate and improve upon the service. But it's not just a conversation that we have with our new mobility types of pilots, it's something that we're having on our express lanes right now which is our toll program, and so they're the larger -- it's just such a big issue.

>>Speaker:
Rik, if I may just get back real quick on that point from Emma, the difference it states clearly is the notion that in these contracts or these partnerships, there's actually public funds going to these providers so that their relationship is is a little bit -- DOTs

throughout the country are trying to have access to very rich sets of data from a kind of just general management of the infrastructure approach, but I think from our perspective, there's a level of accountability about the services that are being provided, precisely because we're paying for them that I think kind of make a more robust case for why we need the data beyond just, again, some of the planning and operational needs. So I think that's a distinction that sometimes escapes providers or the public in general, the fact that we're asking for this data, step A, because we're paying for the services.

>>Rik Opstelten:
That was good insight. I do want to be relatively respectful of people's time as we're running close to 3:30 now, but a question was asked about the implications of some of this data on safety and security. So safety and security obviously is a big concern and we've talked a lot about ensuring the privacy of the people who are using these services in terms of the personally identifiable information and the like. Let me ask this question as kind of a tie-in to that. Earlier one of the speakers noted that there has been as of yet no data requests from the FOIA -- have any on the phone had a request for this kind of data?

>>Speaker:
We have not in the Puget sound to date.

>>Speaker:
That was me, Rik, and no, I have not received one to date.

>>Speaker:
Yeah, we haven't received any in Santa Monica.

>>Speaker:
None here from FTA. I think it's interesting, I'll note that as operators in the industry, express their concerns to trade groups and things like that, those percolate up through several channels, OMB provides the recommendations to us in order to provide more clarification so we took that to heart in order to develop better partnership in the NTD.

>>Rik Opstelten:
Thank you, guys, for that input. It looks like we are closing in on 3:30. My apologies for those of you that might be looking for the transcription box, that has temporarily found its way away from our screens. But rest assured the transcript is being reported as is the entirety of this presentation and will be posted. So as we conclude, first off let me say again, many, many thanks to our presenters and to also the audience for your questions. We've had a really great exchange of information here that I think speaks to the way in which these partnerships are evolving and the value of the exchange of information and experiences that we've been able to facilitate and we continue to see happening. So part of that exchange, again, is the fact that this webinar is one of two that we are hosting in this month. Next week we'll have the compliance with FTA requirements in transit and shared mobility partnerships. That will be an overview of the application as I said of drug and alcohol testing, ADA Title VI and other requirements, in

such arrangements between shared mobility providers and public transit agencies. There we're going to be highlighting the good work of pierce transit and one in South Carolina. In addition to that, FTA as represented by a member of our Office of Chief Counsel will answer some key frequently asked questions and we'll also share some additional resources and provide additional information that we hope can support the successful management of those requirements. You'll find the link to register for that event in the same email that contained the invitation to this, and we will have another announcement made by the same channels, our GOV delivery system, so if you subscribed to us, please do ensure that you've signed up for our mailing lists so that you might be always aware of opportunities like these to engage in some of this information sharing. So again, thank you to the audience, thank you to our presenters, and until next week.