



Vanpool Services Department
511 Regional Rideshare Program
Standard Operating Procedures

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NOTE FOR PURPOSES OF PROCUREMENT SUPPORTING DOCUMENTATION:

This SOP reflects procedures for the Rideshare Program FY12-FY16 Scope of Work. Not all procedures will be applicable under future contracts

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1. Introduction

The 511 Vanpool Services Department is responsible for maintaining the vanpool fleet and supporting vanpool vendors efforts to form new vanpools. While 511 works with vanpool groups of seven to fifteen passengers including the driver, special attention is given to the State of California Vehicle Code Division 1, Section 668 as defined below:

“A ‘vanpool vehicle’ is any motor vehicle, other than a motor truck or truck tractor, designed for carrying more than ten but not more than fifteen persons including the driver, which is maintained and used primarily for the non-profit work-related transportation of adults for the purpose of ridesharing.”

Some vanpool support functions are shared with SNCI in Solano and Napa counties. A service agreement between SNCI and 511 is included as Attachment H.

The department consists of a Vanpool Services Representative, and one manager. A job description for a Vanpool Services Representative can be found as Attachment A.

- Vanpool Manager – [REDACTED]
- Vanpool Services Representative – [REDACTED]
- The Vanpool Services Representative and manager share the following responsibilities except in Solano and Napa counties:
 - a. Maintain monthly contact and support vanpool drivers.
 - b. Meet vanpool formation goals set by Metropolitan Transportation Commission (MTC).
 - c. Conduct employer events as a back up to employer service reps and events coordinator.

511 meets bi-monthly with SNCI to review best practices and data base management.

2. Vanpool Services Activities Overview

The following are the main functions of the Vanpool Services Department:

1. With the assistance of the Employer Services Representative (ESR) and rideshare marketing, “sell” the concept of vanpooling and 511 RRP services to commuters. (See Section 3.0)
2. Generate vanpool leads and provide them to vanpool vendors (See Section 4.0)
 - 511 Contact Center referring outbound phone calls from their placement call task/effort who’ve expressed interest in vanpooling
 - Vanpool vendors
3. Help form vanpools (Section 5.0)
4. Support and maintain vanpools (See Section 6.0)
5. Provide vanpool incentives (See Section 7.0)
6. Maintain and update vanpool databases See Section 8.0)
7. Maintain strong working relationships with vanpool vendors and delegated county outreach staff

3. Selling the Vanpool Concept

Typically Employer Service Representatives (ESR) discuss the value of vanpooling with employers, but occasionally a Vanpool Services Representative interface directly with an employer. An overview of the information the RRP provides to employers and commuters is as follows:

- What vanpooling is,
- Types of van arrangements – employer-sponsored, leased, owner-operated
- Employer benefits:
 - reduce parking,
 - improve employee retention and attendance,
 - reduce employer pay roll taxes by implementing commuter choice benefits.
- How the RRP can help form and maintain the vanpool
- Employee benefits:
 - Cost effective compared to driving alone
 - Reliability
- Participate in vanpool information meetings and recruit riders and drivers.
- Incentives and services (See sections :
 - Review driver requirements and conflict resolution processes.

4. Vanpool Lead Generation & Confirmation

Vanpool leads are generated from

- The ridematching system,
- Employer events,
- Employer service representatives,
- Employer surveys,
- On-line commuter events,
- Existing vanpools on the road,
- Other partners, i.e., delegated counties, TMAs, etc.

When a Ridematch Registrant selects “I would like to become a vanpool driver,” the RMS automatically emails this name to the Vanpool Services Representative (VPC). The Vanpool Services Representative qualifies all leads by confirming adequate commute distance and runs a matchlist to identify potential riders.

The VPC contacts the vanpool lead to:

- confirm selection made on the ridematching systems registration page is accurate,
- explain 511’s role.
- determine if they are interested in being an owner operator, employer sponsored or 3rd party leased vanpool option.

If the driver is interested in starting an owner-operated van, 511 provides the support described in Section 5.0. If the driver is interested in a 3rd party leased van, 511 gets permission to forward the drivers’ contact information to vanpool vendors. If the potential driver does not grant permission, 511 staff provide the vanpool vendor contact information to the prospective driver.

511 staff then follow up with the driver after a week to see if he/she contacted the vendors and ask if 511 can provide any additional assistance. 511 then assists the van vendors as described in 5.2 below. A process flow chart is provided in Attachment D.

5. Vanpool Formation Assistance

5.1 Owner-Operated Vans

The VPC places the lead on the vanpools forming report. The vanpool forming report tracks when the VPC started working with the vanpool lead to form an owner-operated vanpool and records all interactions that occur to help get the vanpool going. It can take from one to 6-months to get an owner-operated vanpool going depending on lead's motivation, and available and interested riders.

The VPC works with the vanpool lead as follows to create the vanpool:

- Mine the 511 RideMatch Service for passengers by running a “Commuter Preferences” and “Registration by Employers” report that identifies clusters of registrants based on origin and destination zip codes.
- Contact the Employer Service Representative and/or the delegated county partner and ask for employer assistance at the lead employer or neighboring employers to:
 - post riders wanted signs and/or send an e-mail blast to employees regarding riders wanted
 - run density maps
- Meet with Employer Service Representatives to review the vans listed on the “vanpools forming report”, and discuss strategies to implement in partnership with employers, TMAs, and County TDM Partners such as sending a “vanpool forming” email or hanging “Riders Wanted” posters.

If the van is not formed by the 5th month, then it is removed from the vanpool leads report. If the group is highly motivated and wants to go on the road despite not being full, 511 RRP may consider it a new start with 70% ridership and continue recruiting riders. 511 RRP does not provide the start incentive (See Section 7.0) until there are at least seven riders in the van.

5.2 Vanpool Vendors

Two vanpool vendors, Enterprise Rideshare and vRide dominate the 511 service area. As 511 receives and qualifies a lead, it is passed on to both vendors. 511 maintains a neutral position by referring vanpool leads to both vendors and providing consistent services and information to both vendors. Additionally we supply the vendors with vanpool maintenance support by providing vanpool drivers and/or vanpool coordinators with commuters in the 511 RideMatch System who match the vans' commute and who are interested in joining a vanpool.

6. Vanpool Support and Maintenance

6.1 Assist Drivers Meet Legal Requirement

511 provides information to potential vanpool drivers about the following requirements that must be met to drive a vanpool:

1. Evidence of a medical examination required for a Class B license (State of California Vehicle Code, Division 6, Chapter 1, Article 3, Section 12804.9 (j)). This examination must be updated every two years.
2. A statement, signed under penalty of perjury, that he or she has not been convicted of reckless driving, drunk driving, or hit-and-run offense in the last five years” (State of California Vehicle Code 12804.9 (j)) The DMV provides “Sworn Statement Safe Driving Record” wallet-sized cards to 511 to provide to vanpool drivers.
3. A driving record showing no more than 2 points and no report of hit and run accidents or DUIs in the last 5years (State of California Vehicle Code 12804.9 (j))
4. A sign or placard, clearly visible and discernible for a distance of not less than 50 feet, indicating that the vehicle is being used as a vanpool vehicle (State of California Vehicle Code 34509.(e)) (511 provides these decals to drivers.)

511 will not list any van in the 511 database nor provide incentives to any van that does not meet these requirements. 511 checks requirements for owner-operated vans, while vanpool vendors ensure these requirements are met by the drivers to whom they lease. 511 also provides some assistance to help drivers meet the requirements as described below.

Requirement	511’s Service	Eligible Recipients
Medical Reimbursements	511 RRP provides, up to \$75.00 medical reimbursement for up to two drivers per vanpool. To receive a \$75.00 reimbursement for the medical exam, drivers provide a signed copy of their medical examination certificate and a copy of the medical fee receipt. 511 keeps these on file for two years, at which time the drivers are notified to renew their medical exam certificates. Any vanpool that has driver(s) with expired/non-compliant medical exams will NOT be awarded any incentives, seat subsidies or other cash-value item. 511 RRP will NOT list those vans on the “critical” list nor make placement calls for those vans.	Drivers of any vanpool
DMV requests	Motor Vehicle Report 511 maintains an account with the DMV to request drivers’ information via the following Web site: http://www.dmv.ca.gov/forms/inf/inf1119.pdf	Drivers of owner-operated vans

	511 keeps the reports secure and confidential. Information is viewed by 511 staff only, and is kept in a locked and secure area. Results are shared only with the driver and to advise the group that the driver has satisfied the standards for the state of California. (It is illegal to share this information with anyone, even with the driver's employer.) Motor vehicle reports are shredded upon vanpool retirement.	
Vanpool Vehicle Signs	511 provides magnetic vanpool signs to owner operated vanpools that are registered in the 511 RideMatch Service.	Drivers of owner-operated vans

6.2 Additional Vanpool Support Services

In addition to helping and ensuring that vanpool drivers fulfill legal requirements, 511 provides the following support services. These services are provided by the Vanpool Services Representative and Vanpool Manager, as necessary, through phone calls and emails resulting in the Follow-Up Driver Support tally that is included in the monthly report. See Attachment G.

Service	Description
Annual & Quarterly Vanpool Parking Permits	<p>City of Oakland – vanpools destined for the downtown area of the City of Oakland are eligible for discounted parking permits and the fees are based on passenger capacity and are renewed every quarter. Vanpools with eleven to fifteen passengers pay \$60.00 and seven to ten passengers pay \$120.00 quarterly. Vanpool drivers complete an application and supply to 511 RRP a check payable to the City of Oakland. A signed parking permit is provided by the City of Oakland to 511 RRP, and is then passed on to the vanpool driver. The driver also receives a map and list of designated parking areas within the City of Oakland. As of winter 2015/16, the RRP is working with the City of Oakland to simplify the process and make it more similar to the City of San Francisco’s process (see below).</p> <p>City of San Francisco - Vanpools with seven to fifteen passengers pay an annual fee of \$111.00 for annual permits that expire on August 31. Vanpool Parking permits authorizes vans to park in spaces designated and signed for vanpool parking. In addition, permits allow vans to park at any meter in San Francisco with a time limit of 60 minutes or longer. Vans with current permits can park at these meters all day for no additional charge. Permits are to be displayed on the dashboard and drivers must confirm that the meter has a time limit of 60 minutes or more. This is a seasonal process that begins in July and runs through August. Annually, the RRP sends the City of San Francisco a list of eligible vanpools. The City notifies the vanpools about the vanpool parking. Vanpools apply</p>

	<p>directly to the City, pay the City, and the City Department of Parking and Traffic issues the permit. The City of San Francisco Department concludes the process in mid-September by providing to the RRP the number and names of vanpool groups who've been issued parking permits. The rideshare program informs the City if any vans on the list fold during the year so that the City can revoke the vanpool parking permit.</p>
<p>FasTrak® Transponder Distribution</p>	<p>The RRP is the account holder of non-revenue vanpool FasTrak® transponders for all qualifying Bay Area vans. RRP staff provide these tags to vanpool drivers operating vanpool vehicles with 11-15 passenger seating that cross Bay Area state-owned bridges (state-owned bridges include all bridges except the Golden Gate Bridge). See Attachment B - FasTrak® Toll Tag Application & Distribution Procedures. The RRP vanpool manager monitors the monthly FasTrak® statements and the Vanpool Services Representative monitors the daily statement activity to ensure vans are in compliance with their FasTrak® agreement (See Attachment C for the review procedure) Monthly FasTrak® billing review takes place between the 1st and 5th day of the month for review of the preceding month's billing statement. The Vanpool Services Representative and manager access the monthly statement by: Go to: www.bayareafastrak.org Log-in type: Select "Account" Account #: [REDACTED] Pin #: [REDACTED] User Name = [REDACTED] Password = [REDACTED] Under "Account Overview" > Latest Toll Transactions, select "More" Look for "Statement Period" pull-down Complete instructions are found in Attachment C</p>
<p>The "Critical List"</p>	<p>Vans with one (1) or more seats unfilled and are in need of riders are placed on "the critical list." To fill these empty seats, Rideshare.511.org features a "Vanpool Seats Available page." Vanpool staff update, add and remove vanpool information from this page using content management software to feature the vans with empty seats. Critical list vans are provided a service of a placement email message from the Vanpool Services Representative to potential passengers. 'Riders Wanted' posters are also provided to the driver/coordinator for display, as permitted, in their workplace. The vanpool stays on the list until the seats are filled or until the driver/coordinator ask to have it removed. The list can be found here:</p> <ul style="list-style-type: none"> • http://rideshare.511.org/vanpooling/webvan_admin/ • Username: [REDACTED] • Password: [REDACTED]

7. Incentives

511 provides incentives to (1) help start a new vanpool by off-setting start-up costs and (2) help maintain an existing vanpool with empty seats by offering a seat subsidy. Both incentives are provided via gas cards. Additional details are provided later in this document under the “Incentive” section.

6.1 Vanpool Start Incentives

511 provides up to \$500.00 in gas cards to new vans that meet all eligibility requirements outlined below. The gas cards are offered in two installments: \$250.00 after three months of successful operations and another \$250.00 after six months. The incentive is offered on a first-come, first-served basis, until funds are exhausted. The gas cards are provided to the driver, back-up driver or coordinator.

6.1.1 Eligibility Requirements:

A vanpool is eligible for the gas cards when all the following conditions are met:

- A new primary driver or new driver/coordinator registers with the 511 and forms a new vanpool;
- The van stays on the road with at least seven people, including the driver, for three to six consecutive months;
- The vanpool has an origin or destination within the 511 Rideshare’s service area;
- The coordinator or driver has provided a complete list of passengers and current day-time contact information for six months; and
- The new van has no more than 40 percent participants from a previous van operating in the last 180 days and the previous van must still be on the road

The RRP also publicizes and administers an additional start incentive for vanpools on behalf of the Transportation Authority of Marin (TAM) for vans that have an origin or destination in Marin County. TAM funds the incentive with a TFCA grant. The incentives are offered on a first-come, first-served basis, until the funds are exhausted. The incentive off-sets the vanpool cost \$3600.00 over 24 months: \$600.00 is provided every four months. Vanpools must meet all eligibility requirements and successfully complete the required consecutive months of operation.

A vanpool is eligible for the TAM subsidies when all the following conditions are met:

- 1) A new primary driver or new driver/coordinator registers with and forms a new vanpool starting;
- 2) The van stays on the road with at least seven passengers for four to twenty-four consecutive months;
- 3) The vanpool has an origin or destination within Marin County, California;
- 4) The coordinator or driver has provided a complete list of passengers and current day-time contact information at the completion of the first and fourth months of operation, and every four months thereafter;
- 5) The new van has no more than 40 percent participants from a previous van operating in the last 180 days and the previous van must still be on the road.

The rideshare program publicizes TAM’s rideshare subsidies to people who contact the rideshare program and through the 511.org Web site. Rideshare staff defer to TAM any “case by case” decisions around eligibility or requests for exceptions to the rules. Rideshare staff also issue monthly reports to TAM about that detail program inquiries, new eligible vanpool formations, and incentive distribution. TAM has final authority to approve subsidies, after receiving the report from 511 RRP and issues the subsidies within thirty (30) days after receiving the RRP report.

8. Database Management

The vanpool staff maintains and uses two databases to assist with vanpool formation and services. The first database is part of the 511 RideMatch Service and the second is a FileMaker Pro database that tracks the communication and follow-up contact between Vanpool Services Representatives and vanpool drivers/groups. Each database is a working database that is reviewed daily by Vanpool Services Representative and reviewed weekly by the vanpool manager.

The 511 RideMatch Service vanpool database keeps the contact and route information for van drivers and primarily aides the Vanpool Services Representative in finding passengers to keep the vans full and on the road. The primary vanpool screens in the 511 RideMatch Service include:

Vanpool Member Screen – Attachment E	This screen contains driver license number, date of birth, motor vehicle report status, motor vehicle report request and receipt dates, medical reimbursement fees, Admin comments, driver(s) and coordinators of the van, seats available, and future contact dates. It is used to keep record of vanpool status and driver information, as required by the State of California. Information here is used to identify when notices should be sent to update and renew motor vehicle reports and medical exams.
Vanpool Overview Screen – Attachment E	This screen contains the following vanpool information: vanpool identification number, date the vanpool started, vanpool status (forming/start), vanpool start date, license plate #, vanpool year, make & model, number of seats, vanpool type, ownership and other rider information. It is updated regularly and used to contact drivers to provide support services.
Team Assignments – Overview Screen – Attachment E	This screen contains driver, back-up driver and coordinator information and is used to identify all the drivers and coordinators that are linked to a vanpool identification number.

FileMaker Pro is a database system used to aid in the follow-up process for potential van drivers and the record keeping of incentives for existing drivers. An updated FileMaker Pro database was created in 2011 that combines vanpool leads and all 511 administered vanpool incentive tracking in one system (Attachment F). The ability to make notes and cross reference data allows for more efficient means of tracking activity and working with vanpool groups.

FileMaker Pro databases include:

Contact Tab	These are the main pages that make up a file for each driver/back-up driver and/or coordinators. The contact page has all the pertinent data that describes the make-up of the vanpool group. They also include tabs for details of incentive tracking and related information and misc notes.
Critical Website Tab	This page allows for easy adding/deleting of critical vans that are placed on the 511 Rideshare Web site's vanpool page
Map Tab	This page allows the VPC to identify the route of the van when speaking to a driver or potential rider.
RMS Tab	This tab provides a direct link to the 511 RideMatch Service log in page
Reports Field	This drop down box allows the following reports to be ran; Monthly Lead Report, Destination County, 511 Start Incentive, TAM Start Incentive, 511 Seat Incentive. They include start dates, origin/destination, award distribution dates, follow dates.

9. Vanpool Conflict Resolution

Infrequently, a vanpool driver or passenger contacts the 511 RRP to report behavior they feel is inappropriate. 511 typically recommends that the group (drivers and passengers) hold a group discussion and does not get further involved. If the vanpool group decides to remove a rider, 511 will assist with recruiting a new rider.

If a rider complains about an unsafe driver, staff first determine if the vanpool is owner-operated or a leased van. If leased, rideshare staff refer the rider to the vendor and separately follow up with the vendor to find out the resolution of the situation. If the vanpool is owner-operated, staff will advise the driver that a complaint has been received and that rideshare staff will contact at least half of the total riders of the van to corroborate the complaint. Staff advise all riders that information they share may go back to the van driver (accused) and/or may affect 511 and MTC's support of the van. Rideshare staff record passenger names and their descriptions of the incident and share the information with MTC to determine next steps.

Rideshare staff should never offer an opinion that can be viewed as bias to facts not revealed at that the time of the notice.

Attachment A, Job Description

Vanpool Services Representative

REQUIREMENTS:

Bachelor's degree in business/marketing or equivalent work experience, experience in customer service, outside sales, consulting, or professional services, strong decision making and workload management skills, ability to exercise prudent independent judgment, excellent communication skills including strong public speaking, proficiency in the Microsoft suite of software, comprehensive knowledge of the San Francisco Bay Area and its transportation system.

JOB SUMMARY:

The primary role of the Vanpool Services Representative is to identify market potential/transportation corridors for generating new vanpool units and vanpool riders, and market vanpooling to area employers and employees. The Vanpool Services Representative accomplishes this through generating leads through activities such as but not limited to direct contact with local businesses and others through presentations to key personnel, education of area commuters, and the creation and use of marketing incentives. The Vanpool Services Representative will also be responsible for defining and maintaining a mutually beneficial relationship with the vanpool vendors to retain existing vanpools, form new vanpools, mine the regional rideshare database for additional vanpool participants and develop and execute programs targeted to specific employers, corridors and/or industries.

MAJOR DUTIES:

- Respond to leads from Employer Services Reps to identify opportunities for vanpooling
- Identify strategies in collaboration with Employee Transportation Coordinator (ETC) to maintain existing vanpools and form new ones
- Create and maintain a mutually beneficial relationship with the region's vanpool vendors
- Collaborate with Commuter Services staff to regularly mine the rideshare matching and other database for potential vanpool passengers
- Coordinate with 511 ESRs to personalize employee commute surveys to determine employee commute patterns and interest in vanpooling
- Coordinate with 511 ESRs to obtain the cooperation and participation of area businesses in vanpooling
- Collaborate with participating employer to establish tailored incentives to increase employee participation in vanpooling to/from their work site
- Maintain an ongoing relationship with each Employee Transportation Coordinator to assure continued and increased participation
- Conduct promotions and develop new marketing tools to increase awareness and vanpooling at work sites with established programs
- Coordinate with 511 ESRs to educate participating employers' staff on implementation of the vanpoolers' tax benefit program

Other duties assigned

Attachment B, Non-Revenue FasTrak® Toll Tag Procedures

1) Getting started.

- A. Applicants can get the FasTrak® Application Packet from 3 sources:
 - 1. On-line at http://rideshare.511.org/pdfs/511_vanpool_FasTrak_11-15_application_06-2010.pdf
 - 2. Vanpool Vendors
 - 3. 511 Rideshare Vanpool Staff
- B. The Application Packet includes:
 - 1. Cover letter
 - 2. 511 Rideshare Vanpool Incentive Application
 - 3. BATA/511 Rideshare Vanpool Program FasTrak® Application & License Agreement
 - 4. 511 Rideshare Program FasTrak® Participant List
 - 5. Sample wallet-sized Medical Examiner's Certificate that must be signed by a physician *
 - 6. Sample Sworn Statement Card*

*These two items are required by State of CA Vehicle Code 12804.9j. Vanpool vendors always confirm that these docs are current and in order. In the case of owner operators, 511 Rideshare verifies current docs by running motor vehicle reports and requesting proof of current medical examination certificate before sending applicant the toll tag.

2) The Process (after Applicant returns Attachments from the Packet)

- A. Once the application documents have been received, the Vanpool Services Representatives (VPCs) follow the FasTrak® Checklist for Toll Tag Mailing Sheet to process the FasTrak® application.
- B. The consultant verifies that:
 - 1. All documents are signed by the applicant,
 - 2. Medical examiner certificates are current within two years,
 - 3. DMV record meets industry standard (i.e. no more than 2-3 points and no DUI) (Do not process toll tag if this information is missing.
 - 4. The applicant's vanpool is registered in the RMS and that they have a vanpool identification number (V.P. ID#)
- C. If the applicant is not registered, enter applicant into the 511 RMS as a new registrant and confirm the vanpool by obtaining a passenger list.

- D. Enter applicant's information in the FasTrak® log: R:\Vanpool_Services\FasTrak® Toll Tag Inventory Distribution Log; Assign a toll tag number.
- E. Go to the FasTrak® Web site: <http://www.bayareafastrak.org/> (see Vanpool Manager for password) to enter vehicle information.
 - 1. Click on "Log into Your Account"
 - 2. Under "My Account Login", enter Username and Password, and click on "Login".
 - 3. Look in upper left section for "My Account" and select "vehicles & toll tags.
 - 4. Scroll down to "Find Vehicles" section and enter license, make, model, year and effective date
 - 5. Select "add vehicle".

3) Mail the FasTrak® Toll Tag to the Applicant

- A. Prepare U. S. Postal Service Certified Mail Receipt and PS Form 3811 Return Receipt for mailing.
- B. Place Toll Tag in a Mylar Bag.
- C. Enter the Toll Tag number in the first paragraph of the Congratulations letter R:\Vanpool_Services\FasTrak\FasTrak Congratulations Letter.doc (See Attachment D).
- D. Prepare ten participant lists and ten stamped self-addressed envelopes (addressed to the 511 Rideshare office) with the dates they should be mailed to 511 Rideshare by the Applicant. For example, if mailed on 1/9/2011, dates on participant list should be 6/9/2011, 1/9/2012, 6/9/2012, 1/9/2013, 6/9/2013 and 1/6/2014.
- E. Enter each date, driver name and V.P. ID# in Microsoft Outlook Task To-Do List as a reoccurring task to trigger reminder notice to vanpool driver to send in participant list. If no list is returned after 30 days and/or 4 phone/email attempts, the toll tags will be deactivated by a Vanpool Services Representative or vanpool manager.
- F. Enclose two to three Sworn Statement cards as required by the State of California Vehicle Code 12804.9J. (There might be more than one driver.)
- G. Tape U. S. Postal Service Certified Mail Receipt – PS Form 3800 to back of FasTrak® Checklist for Toll Tag mailing Sheet. When the Applicant's signed Return Receipt – PS Form 3811 is returned to 511 Rideshare, tape it to the FasTrak® Application .
- H. Complete the FasTrak® Checklist for Toll Tag Sheet
- I. Place all information in the FasTrak® binder. The binder is located in a locked cabinet in the Vanpool Services Representative's cubicle. File these documents based on the toll tag number.

4) Processing Receipt of Six Month Passenger List

- A. Upon receipt of each six month passenger list, date, sign and verify vanpool I. D. Number and record the information in the vanpool driver's profile in the RMS's FasTrak® Information.

5) Procedures for New and Loaner Vans

- A. Driver changes vans or has a loaner van.
 - 1. Note the circumstances of the vehicle change in the Vanpool Admin Activity notes section of the vanpool member screen.
 - 2. List the new van or loaner in the FasTrak® Web site as soon as you get the vehicle information and make the effective date at least five days prior to notification from the driver or leasing company.
 - 3. If it is a loaner van, have the driver call you when he/she gets original van returned and delete loaner information from FasTrak® Website.
- B. Driver has a defective toll tag
 - 1. Use the "Check-Off List For Defective FasTrak® Toll Tag Return" form and follow the procedures listed. Check off each item on the list. (See attachment I). All envelopes and labels are stored in file drawer titled FasTrak® in the Vanpool Services Representative's cubicle. The check off list is located in the RMS, R:Drive Vanpool Services >FasTrak® > Driver Returning Toll Tag to 511. Upon receipt of defective toll tag, mail to FasTrak® at Bay Area FasTrak® Customer Service Center, P. O. Box 26926, San Francisco, CA 94126 to the attention of Michael Nuqui, Escalation Department Manager by certified mail.
 - 2. Update new information in the RMS, R: Drive FasTrak® Toll Tag Inventory Distribution Log and the FasTrak® Website (See 2.E.1 and 2E.2 for new application above)

5) Procedure for Lost Toll Tag or Failed to Return Defective Tag

- A. 511 Rideshare sends an email requesting payment of \$20 to driver to pay by check or credit card payable to Bay Area FasTrak®. When payment is received at 511 Rideshare, make a copy and send to FasTrak® to the attention of Michael Nuqui. Best practice suggests physically taking the payment to the FasTrak® office located at 475 The Embarcadero (at Broadway) San Francisco, 94111 between the hours of 8:30 a.m. to 5:30 p.m. A cashier will take the payment and give a receipt for the files. (See 4.B.2 above for address.)
- B. Upon receipt of payment by FasTrak®, toll tag is deactivated.

6) Procedure for Stolen Van and Toll Tag

- A. When a van is reported stolen with the toll tag, request a police report immediately. The driver usually has a copy or requests a copy from the investigating police department.
- B. Fax police report with toll tag number to Michael Nuqui and/or Mary King at (415) 983-0478. Toll Tag will then be deactivated.
- C. Repeat procedure 3.A.1, 3.A.2 and 3.A.3 above.

7) Procedure When Driver Crosses the Golden Gate Bridge and generates a Deduction to our account

- A. This account should be checked on a daily basis to make sure there are no violations. If a violation shows up, a \$4.00 to \$6.00 deduction is generated on the FasTrak® account when a driver crosses the Golden Gate Bridge with a non-revenue FasTrak® toll tag.
- B. To correct this, locate the license plate or toll tag number that crossed the Golden Gate Bridge by , going to the FasTrak® Web site: <http://www.bayareafastrak.org/> (see Vanpool Manager for password) to enter vehicle information.
 - 1. Click on “Log into Your Account”
 - 2. Under “My Account Login”, enter 511ridesare for Username and password, and then and click on “Login”.
 - 3. Look in upper left section for “Overview” and select “Transactions”.
 - 4. You will see a negative balance of between \$4.00 to \$6.00; page through the transactions until you locate the license plate or toll tag number that generated the violation. It will be listed under the debit section of the transaction page.
 - 5. Contact the driver connected to the plate or toll tag number in the RMS and have driver issue a \$4.00 to \$6.00 check for violation fee payable to Bay Area FasTrak®. Upon receipt of check, make a copy, file with his/her records and send the check with the FasTrak® letter for Golden Gate Bridge Violators via certified/return receipt to; Bay Area FasTrak® Customer Service Center P.O. Box 26925 San Francisco, Ca 94126
 - 6. When certified return receipt is received to 511 office file with violator driver file. Check FasTrak® account and confirm the credit has been made to our account. If not call FasTrak® Customer Service immediately let them know we’ve received the return receipt on XX date and funds have not been credited. Ask for status date that our account will be credited.

8) Returning Used and Defective Toll Tag to FasTrak®

- A. When you have accumulated six to eight used or defective toll tags, return to FasTrak® for their deposition.
1. Prepare U. S. Postal Service Certified Mail Receipt and PS Form 3811 Return Receipt for mailing.
 2. Go to the Vanpool folder in the R:drive and locate the FasTrak® folder.
 3. Locate folder “FT Toll Tag Returned to FT” and open “Letter – Returned To FasTrak®” and update with current certified mail number and toll tag numbers being returned. (See Attachment I).
 4. Open FasTrak® Toll Tags Old & Defective Returned to FT spreadsheet. List the tags in the first sheet called “Sorted numerically” and update.
 5. Go to the second sheet, “Certified Mail #'s” and add date, certified mail # and list toll tags being returned. (See Attachment I).

9). For all emails the following FasTrak® personnel are copied:

A. [REDACTED]

B. [REDACTED]

Attachment C, FasTrak® Account Review

This process is used to identify the daily activity and verify proper toll tag usage. Toll tags (FasTrak® transponders) provided to vanpool vehicles that carry 11-15 passengers by 511 RRP and FasTrak® are for vans crossing bridges once per day. When reviewing the account, it is essential to check the TRANSACTION date rather than POSTING date.

When reviewing the 511 RRP FasTrak® account, unusual toll tag transactions to look for include: multiple use of the same tag with multiple postings of the same tag, on one bridge during a single day; and individual license plates appearing multiple times during the 30-day period.

STEP 1 –

Log on to the 511 RRP (FasTrak®) account

Log on to: www.bayareafastrak.org
 Click On: Log into Your Account
 Username:
 Password:
 Enter Validation Code Shown
 Under “Account Overview” > Latest Toll Transactions, select “More”
 Look for “Statement Period” pull-down menu > select most recent 30-day period (Listed as: MO/27/YR – MO/26/YR)

STEP 2 –

On the 511 RRP (FasTrak®) statement do a quick overview of the following columns: **Transaction Date, Time, Toll Tag and Facility** – see image below:

Date Posted to Account	Transaction Date	Time	Toll Tag	Facility	Activity	Lane No.	Debit (-)	Credit (+)	Balance
10/30/08	10/30/08	05:33:38	02613410899	RSR	TOLL	01	\$.00		\$.00
10/30/08	10/30/08	04:49:04	02613410898	BAY	TOLL	08	\$.00		\$.00
10/30/08	10/30/08	01:11:29	02613410906	CAR	TOLL	02	\$.00		\$.00
10/29/08	10/29/08	21:16:38	02613410905	BAY	TOLL	08	\$.00		\$.00
10/29/08	10/29/08	23:12:58	02613410916	CAR	TOLL	03	\$.00		\$.00
10/29/08	10/29/08	23:10:34	02613410912	CAR	TOLL	02	\$.00		\$.00

TIP: Use last 3 digits when comparing tag numbers

Note: Facility = Bridge (RSR: Richmond, BAY: Bay Bridge, CAR; Carquinez, SMH; San Mateo)

STEP 3 –

Review **Time** column

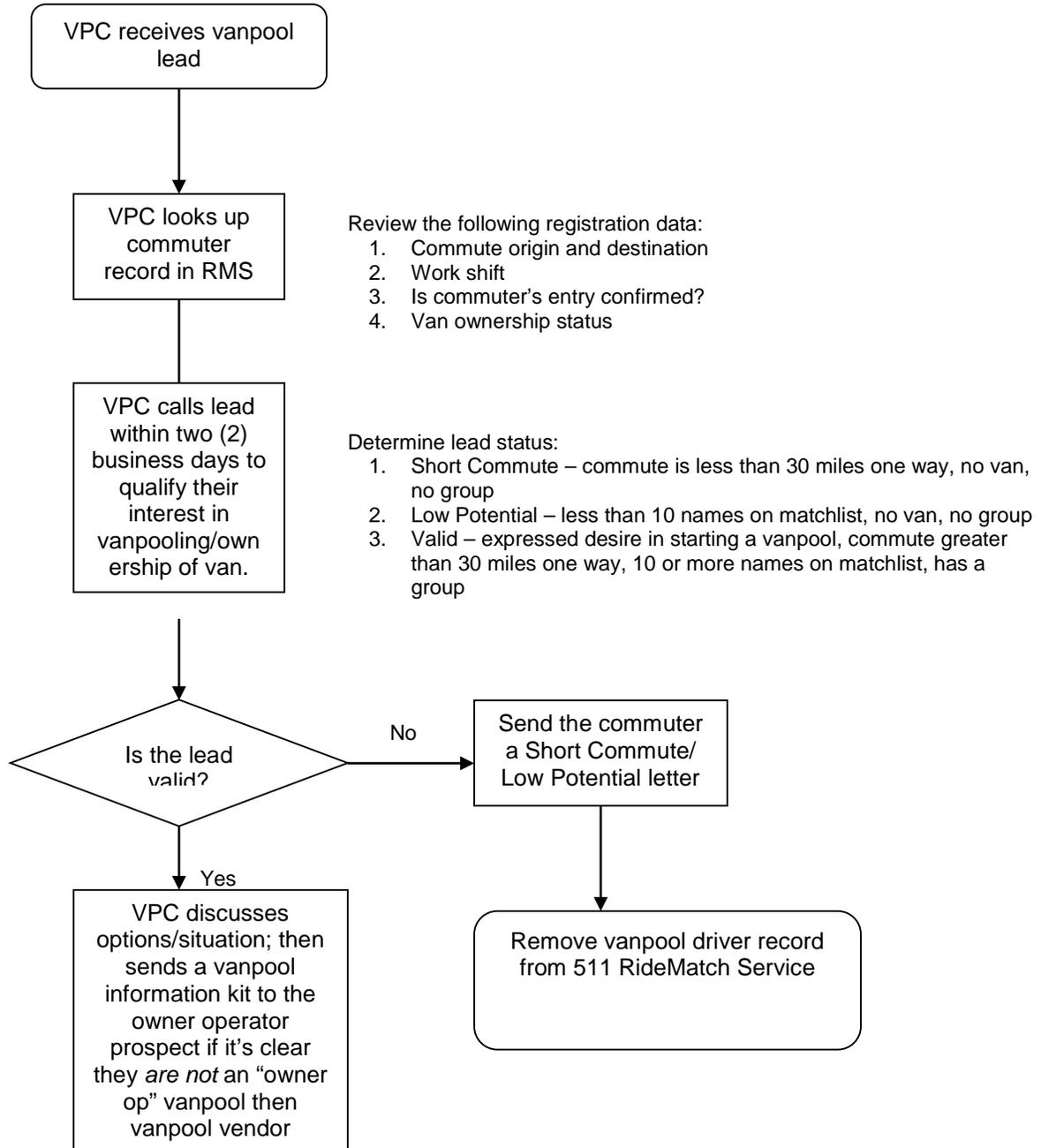
All TRANSACTION times are permitted.

STEP 4 –

Review **Toll Tag** column (Scan toll tags numbers - it's easiest to focus on the last three numbers)

- a. Look for multiple listings of the same tag on the same date
- b. If the same toll tag number is posted multiple times on the same bridge, Vanpool Department should be notified and an inquiry should be made why a transponder is being used on the same bridge more than once a day
- c. If the same toll tag number is posted multiple times within the bridge's toll free hours, Vanpool Department should be notified (confirm that the multiple transactions are not for different bridges [facilities])
- d. Look for license plates that appear vs. the 11-digit toll tag number (license plates start with letters of the alphabet, toll tags will start with numbers (Example: Toll Tag = 01234567891, License = CA9A87654)
- e. If one/two incidents of a license plate occurs during the 30-day period, OK
- f. If multiple incidents of a single license plate appear, Vanpool Department should be notified

Attachment D, Vanpool Lead Flowchart



Attachment E, 511 RMS Vanpool Screens

Manage a Vanpool Member



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VPAUPDVP1

Home
Find Ridematches
Trip Diary
Special Events
Admin Activities
Reports
Log Out

Search Vanpool
Vanpool Member

Member Information

Vanpool Id: <input type="text"/>	Vanpool Status: <input type="text" value="Start"/>
Vanpool Start Date: <input type="text" value="01/31/2006"/>	VPC Contact: <input type="text"/>
First Name: <input type="text"/>	Last Name: <input type="text"/>
Employer Name: <input type="text"/>	Destination City: <input type="text"/>
Origin City: <input type="text"/>	DL State Code: <input type="text" value="CA"/>
Driver's License #: <input type="text"/>	Driver's Role: <input type="text" value="Backup"/>
Date of Birth: <input type="text"/>	

MVR Information

MVR Status: <input type="text" value="Please select one"/>	Follow-up Date: <input type="text" value="04/06/2012"/>
MVR Requested Date: <input type="text"/>	Med Fee Proc. Date: <input type="text" value="04/22/2010"/>
MVR Received Date*: <input type="text"/>	Medical Fee (\$): <input type="text" value="\$60.00"/>

<< Return to Vanpool
Update Member >>

Admin Activity Notes

Activity Code: * Required

Please select one

Admin Notes:

Submit >>

Admin Activity History

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- [Suggestions](#)

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511 Tools

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511.ORG TRANSIT TRAFFIC **RIDESHARE** BICYCLING

VPAUPDVL1 [Home](#) [Find Ridematches](#) [Trip Diary](#) [Special Events](#) [Admin Activities](#) [Reports](#) [Log Out](#)

Search Vanpool
Vanpool Overview

To update any information, make the changes and click on the 'Update Member' button

Vanpool Driver(s) Information

Driver Name	Assignment	MVR Status	Med Fee Date	Med Fee Amount	Follow-up Date
<input type="radio"/> ██████████	Backup		04/22/2010	\$60.00	04/06/2012
<input type="radio"/> ██████████	Driver & Coordinator	Approved			01/28/2011
<input type="radio"/> ██████████	Backup	Approved	07/16/2008	\$66.00	07/15/2010
<input type="radio"/> ██████████	Backup	Approved	07/30/2010	75.00	05/22/2012
<input type="radio"/> ██████████	Backup		08/17/2010	\$60.00	04/14/2010

Add New Member >>
Delete Member >>
Manage Member >>

Vanpool Information

ID Vanpool: ██████████	Create Date: 01/23/2006
Vanpool Status: Start *	Last Modified Date: 10/07/2010
Seats Available: 1 *	Vanpool Start Date: 01/31/2006
License Number: ██████████ *	Future Contact Date: 09/01/2010
Vehicle Year: 2009 *	Submitted Parking Date: 08/11/2010
Vehicle Make: FORD *	Requested Parking Permit: ██████████
Vehicle Model: E350 *	VPC Contact: ██████████
Number of Seats: 14 *	Riders IN RMS: 5
Vanpool Type: Full Size *	Riders NOT in RMS: 6
Vanpool Ownership: Enterprise *	Eligible for Incentive: Yes
Employer Exclusive: No	Critical Van: No

FasTrak Information

FasTrak Number: ██████████	FasTrak Sent Date: 07/01/2010
	FasTrak Deact. Date: ██████████

* Required Fields
<< Return to Search
Delete Vanpool >>
Update Vanpool >>

Vanpool Passenger(s) Information

Name	E-mail	Phone	Mode
<input type="radio"/> ██████████	PASSENGER	██████████	Vanpool
<input type="radio"/> ██████████	DRIVER	██████████	Vanpool
<input type="radio"/> ██████████	BACK UP DRIVER	██████████	Vanpool
<input type="radio"/> ██████████	PASSENGER	██████████	Vanpool
<input type="radio"/> ██████████	DRIVER	██████████	Vanpool
<input type="radio"/> ██████████	PASSENGER	██████████	Vanpool
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA
<input type="radio"/> ██████████	PASSENGER	██████████	NA

Add New Passenger >>
Delete Passenger >>
Manage Passenger >>

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Attachment F, FileMaker Pro

Vanpool Database

Contact Details	Critical WebVans	Map	RMS	REPORTS	?
-----------------	------------------	-----	-----	---------	---

First Name:	<input type="text"/>	VP Consultant:	<input type="text"/>
Last Name:	<input type="text"/>	Pool ID:	<input type="text"/>
Phone 1:	<input type="text"/>	Created On:	<input type="text"/>
Phone 2:	<input type="text"/>	Start Date:	<input type="text"/>
Email:	<input type="text"/>	Vendor Choice:	<input type="text"/>
Company:	<input type="text"/>	Consent to Vendors:	<input type="checkbox"/> Yes
Origin City:	<input type="text"/>	Van Size:	<input type="text"/>
Destination City:	<input type="text"/>	# of Passengers:	<input type="text"/>
Origin County:	<input type="text"/>		
Destination County:	<input type="text"/>		

Resolutions	
Lead:	<input type="text"/>
Start:	<input type="text"/>
TAM:	<input type="text"/>

Lead Tracking	511 START Eligibility	TAM Start Eligibility	SEAT Eligibility	Related Contacts	Misc. Notes
---------------	-----------------------	-----------------------	------------------	------------------	-------------

Follow-Up Date:	<input type="text"/>	Placement Calls:	<input type="text"/>
Date Assign:	10/11/2011	Referral From (Who):	<input type="text"/>
First Contact:	<input type="text"/>	Type of Lead:	<input type="text"/>
Second Contact:	<input type="text"/>	Resolution:	<input type="text"/>
Third Contact:	<input type="text"/>		
Fourth Contact:	<input type="text"/>		

Created By:	Jon Eastlund	Date:	10/11/11	Modified By:	Jon Eastlund	Date:	10/11/11
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ATTACHMENT G, Monthly Vanpool Services Representative Activity Log

Oct-10	Amy	Juanita	Total	Vans Formed/Found								
VANS				ID #	Origin	Destination	# of seats VPC/VPOwner	Total Riders Includes Driver	# not in RMS	# in RMS	Drivers Name	Company
Van Starts												
Vans Found												
Van in Progress												
Vanpool Leads												
Enterprise Leads												
J&B Vanpools												
VPSI Leads												
Fleet Size												
SUBSIDIES												
Start Incentives awarded												
Seat Subsidies Awarded												
Oakland Parking Permits												
SF Parking Permits												
FasTrak® Transponders												
Medical Reimbursements												
INFORMATION SENT				ID	Deletes						Drivers Name	REASON FOR DELETION
Info Kit (IK)												
Start Kit (SK)												
VAN CONTACT-Outbound												
Vanpool Follow-up Lead (VF)												
Follow-up Driver/Support (FD)												
Placement & Recruitment Calls (PC)												
WEB VANS				ID#	Adds to Web site						Drivers Name	Reason
Overview of Meetings				Web Vans - Deleted								
Regional/Networking meetings												
Employer/Employee meetings												
Info Event												
	Comments:											

Attachment H, SNCI/511 Rideshare Service Agreement

7/12/2012

The following agreement is entered into jointly by Solano Napa Commuter Information (SNCI) and the 511 Regional Rideshare Program (511 RRP) and is mutually agreed to.

DIVISION OF SERVICE AREA

Service Area – Vanpools services are provided throughout the 9 Bay Area Counties (Marin, Sonoma, Napa, Solano, Contra Costa, Alameda, San Mateo, Santa Clara, San Francisco). 511 RRP provides service to all Bay Area Counties, except those with an origin or destination in Solano, Napa, Sacramento and Yolo counties These areas will be served by SNCI.

Solano Napa Commuter Information (SNCI) will provide:

Vanpool formation services to:

- All vanpools with Solano and Napa county origins and/or destinations, plus Yolo and Sacramento county origins and/or destinations.

Vanpool support services to:

- All vanpools with Solano and Napa county origins and/or destinations, plus Yolo and Sacramento county origins and/or destinations.

511 Regional Rideshare Program (511 RRP) will provide:

Vanpool formation services to:

- All vanpools with Marin, Sonoma, Contra Costa, Santa Clara and San Francisco county destinations, except those vanpools originating in Solano, Napa, Sacramento or Yolo counties

Vanpool support services to:

- All vanpools except those with an origin or destination to Solano, Napa, Sacramento, and Yolo counties.

Exceptions:

From time to time, there will be vanpools that are formed and/or supported based on specific marketing efforts or long standing relationships with particular employers. Also, conditions for vanpools may require a temporary change in support, i.e., use of 511 seat-subsidy incentive. The responsibility of vanpool formation in these situations will be determined on a case-by-case basis. In the case of relocations, the handling of vanpool formation will be passed onto the agency where the employer is relocating to, i.e., an employer in San Francisco moving to Solano, Napa, Sacramento or Yolo County will be referred to SNCI for vanpool formation credit.

Currently the following companies will be supported by 511 RRP:

- Chevron
- UCSF
- Yahoo
- VISA
- San Quentin

Vanpools that qualify for FasTrak® Toll Tags will be contacted by 511 RRP as needed. Vanpool parking permits for the City of Oakland and City of San Francisco will be processed by 511 RRP.

511 RRP and SNCI agree to offer the following support services in areas described above:

- Medical Reimbursement incentives DMV reports for drivers
- Vanpool signs for vanpool vehicles
- Placement Calls for vanpools
- Passenger recruitment
- Administration of promotional incentives
- Troubleshoot problems
- Critical List assistance
- Maintain accurate contact and database information

SERVICE STANDARDS

To ensure consistency in service throughout the Bay Area, the basic standards of service are defined below.

Vanpool Formation – The completed process of providing a potential vanpool driver a vanpool matchlist, medical form and reimbursement, legislated vanpool vehicle requirements, insurance information, fare advice, route planning information, passenger recruitment assistance, and ----- vendor options (if applicable).

Completed Formation Process/Van Start – 1) Owner/operated vanpools = 70% of the passengers recruited; 2) Leased vanpools = “on the road.”

Vanpool Support Services – Regular follow-up to provide ridership maintenance, passenger recruitment, critical list assistance, troubleshoot problems, maintain accurate contact and database information, administer promotional incentives and parking permits.

SERVICE COORDINATION

Leads

Bay Area vanpool drivers are exposed to marketing that crosses service territory lines. They may call or contact either SNCI or 511 RRP as a result. To provide the best service to the vanpool driver, or potential vanpool driver, SNCI and 511 RRP agree to maintain open lines of communication and the following guidelines:

- The VPC/) who takes the initial call explains the concept of vanpooling and encourages (“sells”) the caller to become a vanpool driver. A matchlist is generated for the vanpool driver lead and the appropriate SNCI or 511 RRP staff contact name (if different from the staff initially handling the call) is provided to the caller.
- The staff that receives the lead will enter the date the lead was sent to the appropriate agency in the “date assigned field” of the VP Lead Follow-Up Report in FileMaker Pro (511 RRP) and Access (SNCI). This report will be exchanged between SNCI and 511 RRP on the 4th of each month.
- The following reports will be sent on the 4th of each month:
 - VP Lead Follow-up Report – used to track follow up with leads and should address the bullet below regarding “no activity”.
 - A start and delete report for SNCI
- If there is no activity made to result in vanpool formation after 2 months, the originator of that lead may follow-up on that lead.

FasTrak[®] Transponders

The Bay Area Toll Authority (BATA) grants permission for vanpools to be classified as a “Commuter Bus” that will allow toll-free passage on the state operated toll bridges. Most vanpools operate during regular commute hours and can use the carpool/bus lanes. The vanpools that operate outside these hours are eligible for free FasTrak[®] transponders. BATA has set up a single master account for the distribution of FasTrak[®] transponders to eligible vanpools. The 511 RRBP will administer that account and serve as the inventory center to distribute the transponders. Vanpool drivers from SNCI service area will be directed to the 511 RRP to process their request for FasTrak[®] transponders.

Incentive Administration

SNCI and the 511 RRP each provide incentive programs for vanpools, which currently include driver, back-up driver, passenger, and seat subsidy incentives. Often members of vanpools are eligible for multiple incentives, those provided by both SNCI and 511 RRP along with incentives from other counties. SNCI and 511 RRP staff will inform vanpool drivers of all the incentives they may be entitled. SNCI and 511 RRP will process requests for their respective incentive programs.

Parking Permits

The 511 RRP will administer San Francisco and Oakland parking permits for all vanpools.

MISCELLANEOUS

- This agreement shall be reviewed at least annually during the 1st quarter and updated as agreed upon by both SNCI and 511 RRP.
- As funding opportunities arise in the future, the parameters of this agreement may be amended to provide the best service to Bay Area vanpools.

Agreed to by both parties: