

# 511 Regional Rideshare Program

## Commuter Services Department

### Selected Standard Operating Procedures



Version 1.0	2011 Update	Daniel Robins	September 2011
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**All Commuter Services files (including SOPs, scripts, templates and tools) can be found here:**

R:\Commuter\_Services

511 Reference Guide

Carpool to BART Related

CSD Quality Control

CSD Tools

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, and have therefore been deleted from this document.***

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# **Table of Contents**

**Commuter Services Department Overview**

**Staffing and Billing**

**CSD Tasks, Projects and Departmental Tools**

**511 RideMatch Service Data Maintenance**

**Placement Calls**

**Staffing Outreach Events**

**Appendix**

## **Commuter Services Department Overview**

### **World Class Customer Service**

The CSD is committed to providing World Class Customer Service (WCCS) and has developed a **CSD Vision Statement** and **CSD Culture** to guide our efforts.

### **Quality Assurance / Quality Control / Feedback**

A series of quality assurance, quality control and feedback processes are regularly utilized to ensure that all tasks and projects are conducted consistently, accurately and efficiently with an eye to incorporating improvements whenever possible.

### **Core Responsibilities**

The CSD is tasked with managing the following core responsibilities of the 511 RRP:

- Conducting outgoing placement calls to 511 RideMatch Service (511 RMS) users
- Managing, maintaining and updating the 511 RideMatch Service
  - New record data entry
  - Record updates
  - Data integrity efforts
  - Reporting
  - Enhancement and usability recommendations
  - Troubleshooting and debugging
- Matchlist generation and distribution
- Staffing outreach events

## **CSD Tasks, Projects and Departmental Tools**

The CSD is responsible for completing daily, weekly, monthly, quarterly, annual and other ad hoc tasks and projects in-line with departmental responsibilities and 511 RRP project deliverables. Tasks are recurring efforts. Projects are one-time efforts. A series of departmental tools are used to help carry out the tasks and projects efficiently and effectively.

### **CSD Standard Operating Procedures, Templates, Scripts and Policies**

CSD Standard Operating Procedures (SOPs), templates, scripts and policies are created to document procedures and processes in order to conduct and manage CSD tasks efficiently and effectively.

### **CSD Tools**

The CSD uses a series of **CSD Tools** to efficiently document and carry out departmental tasks and project deliverables. The **CSD Responsibilities and Deadline Guidelines** provides an overview of CSD responsibilities and deadline expectations for task and project completion.

## **CSD Logs**

A series of **CSD Logs** have been developed to manage, capture and document CSD efforts. The use of these logs, combined with established CSD procedures and processes, helps the CSD consistently generate high-quality results and meet best practice standards.

## **Carpool to BART Permits**

Automated Carpool to BART Permit requests are submitted to 511 RRP from a website request form and users can print them themselves or contact 511 RRP for assistance. 511 RRP provides quarterly Carpool to BART summary and detail reports to BART.

## **511 RideMatch Service Data Maintenance**

The CSD is responsible for 511 RideMatch Service (511 RMS) data maintenance. The 511 RMS allows registrants to find potential carpool, vanpool, or bike buddy matches with other commuters who are interested in ridesharing and have similar ridematching criteria, commute patterns and schedules. The 511 RMS also allows users to log their commute trips into a Trip Diary in order to earn rewards and track financial savings and emissions reductions; in addition to finding regional incentives and/or county benefits they may be eligible to receive based upon where they live and work. 511 RMS data maintenance efforts break out into four general categories: **New Record Data Entry; Matchlist Generation and Distribution; Account Record Updates; and Data Integrity Efforts.**

### **New Record Data Entry**

The CSD is responsible for entering administrator-entered records into the 511 RMS. The majority of this data entry comes from **511 RideMatch Service Registration Forms** submitted to the CSD from outreach efforts (employer and community events). Registrants may also call the 511 Information Center and have their records entered into the 511 RMS over the telephone, particularly if a user does not have access to the internet or an email address. An automated activation email is sent out from the 511 RMS upon submission of each new record. A process to address all undeliverable emails (UDEs) is routinely conducted and attempts to call the registrant are made to see if a valid email address can be obtained. A process to address any registration forms we are unable to enter (UTEs) because of missing required data is routinely conducted and attempts to call the registrant are made to see if the required missing data can be obtained. Users may also choose to create their own records in the 511 RMS.

### **Matchlist Generation and Distribution**

The CSD is responsible for Matchlist generation, which requires using the 511 RMS to create Matchlists for interested registrants. Matchlists provide the user with a list of other active registrants in the 511 RMS that have similar ridematching criteria, commute patterns and schedules. Matchlists can be radius-based or route-based depending upon the customer's preference and matching needs. Matchlists can be

distributed by email, phone, mail and fax. A **511 RMS Matchlist Best Practices SOP** has been created to provide 511 RMS users with an optimized Matchlist that fits their personal needs and/or referrals to other ridesharing services when appropriate. If a user has not activated their account, or wants an administrator to create an account for them, they must verbally agree to the **511 Rideshare Terms of Use** before a Matchlist will be provided or a 511 RMS account created for them. Active 511 RMS users may generate their own Matchlists.

### **Account Record Updates**

The CSD is responsible for updating 511 RMS account records when necessary, as well as entering appropriate activity codes and notes which reflect the historical action(s) taken on behalf of each customer.

### **Data Integrity Efforts**

The CSD is responsible for maintaining the integrity of user and employer data in the 511 RMS. Data integrity efforts are conducted on an ongoing basis using daily, weekly, monthly and ad hoc reports to confirm that 511 RMS data is accurate and up-to-date.

### **CSD Reports**

Daily, weekly, monthly, quarterly, annual and ad hoc **CSD Reports** are used for generating placement calls; conducting data integrity efforts; conducting quality assurance; and/or capturing, reporting and analyzing data. These reports come from a variety of sources including **511 RRP Reports**; **Avaya Phone System Reports**; and **511 RMS Reports**.

### **Placement Calls**

The CSD is responsible for making 12,000 placement calls annually. This is a contractual deliverable. The purpose of making placement calls is to contact 511 RMS users to advise them about rideshare matches; answer ridesharing questions; provide personalized ridesharing consultations; maintain the integrity of the records in the 511 RMS, and to facilitate efficient and accurate sharing of information between potential carpool, vanpool and bike buddy matches.

### **Staffing Outreach Events**

The commuter services department provides outreach event staffing coverage when possible as a back-up for the employer outreach team.