Find a Ride One-Call/One-Click Development Roadmap

This document gives a high-level optimistic development roadmap for Find a Ride, a One-Call/One-Click system, that assumes the availability of funds. The phasing is anticipated chronologically, though opportunities or challenges may expedite or delay the eventual order.

Current Phase 1A (2023): Service Discovery & Trip Planning

Providing riders and their assistors with everything they need to know about the full spectrum of transportation services and programs in King, Pierce and Snohomish Counties.

- **Main technical effort:**
  - Standing up OpenTripPlanner instance with a One-Click overlay to denote eligibility-restricted transportation options.
  - User interface that goes above and beyond ADA standards.
  - Creation and maintenance of GTFS and GTFS-flex feeds.

- **Main institutional effort:**
  - Creation and maintenance of a network that includes as many providers as possible.
  - Creation and maintenance of the "one-call" portion of the system (call center capabilities).
  - Collaboration with other agencies in the region for shared OpenTripPlanner resources and processes to ensure consistent and high-quality trip planning across the entire network.

Phase 1B: Rider Profiles

*Future phase for portable or standards-based profiles that could be used with other apps or services*

Provides a rider travel profile with the option to be shared by riders across providers. The travel profile contains riders' travel preferences, mobility factors, common destinations, and eligibility for services. Profiles would be available to riders and their authorized assistors.
Possible project directions:

1. Continue to convene regional partners to develop a regional strategy for developing rider profiles across agencies.
2. Collaboration with regional transit agencies to assess the effectiveness of shared "OTP middleware" for possible use in future phases.
3. Collaboration and integration with new ORCA, perhaps by a single-sign-on scheme.

**Phase 2: Intake, Eligibility Determination, and Enrollment Verification**

Offers transportation providers an easy and centralized way to establish which riders can use a service or fare not available to the general public. The determinations would then be stored in rider profiles. The design work for this system element is at an early stage.

Possible project directions:

1. Convene regional partners to assess the level of interest and requirements for how such a system would work for as many providers as possible.
2. Develop data security requirements and opportunities for data sharing that would result in an enhanced rider experience or greater operational efficiencies.
3. Intake and eligibility determinations are made separately by each transportation provider. Enrollment information could be entered into the OC/OC system’s rider profile by the transportation provider or by the rider.
4. The OC/OC system could provide a centralized tool for transportation providers to carry out their intake and eligibility determination processes. Passing enrollment information to the rider profile could be a single click after a determination. King County Metro (e.g., Access or reduced fare programs) could be an early adopter of such a system.

**Phase 3: Integration of AccessMap trip planner**

AccessMap was developed by the Taskar Center at the University of Washington, to provide pedestrian travel plans. It may be possible to integrate it with OpenTripPlanner for the pedestrian portion of trip itineraries.

As of 3/31/2023
Phase 4: Trip Brokering

Note: In the transportation field, the process of assigning trip requests to a selected transportation provider to carry out is referred to as “brokering”. This term has become strongly associated with Medicaid, but in this case does not involve Medicaid-funded trips.

Provides a mechanism where rider trip requests can be made to a central hub (the OC/OC system or its associated call center), assigned by the hub to a transportation provider, and then fulfilled by that provider.

Possible project directions:

1. Carry out periodic inquiries into the national landscape for similar tools in development that may be usable in the Puget Sound region. For example: projects in Minnesota, Iowa, Ohio, and elsewhere.
2. Begin with a trip request management system that relies on an intake form and emails for part of its communication with providers. Use this less efficient system to test the feasibility and work out kinks, then develop a more automated system as time and resources allow.
3. Apply for a federal transit grant to build the software to automate and scale.

Phase 5: Payment & Billing

Provides one or more streamlined platforms to facilitate billing and payments between providers and payers to reduce the currently highly manual and one-off nature of third-party payment for riders’ transportation services. For example, a health clinic may wish to provide incentives for a vaccine campaign may be able to pay for its patients to use a given transportation service via a promotion code or similar mechanism. Key questions:

- What organizations would most benefit from the introduction of such systems? What payers? What transportation providers?
- Are there similar systems in other fields that can be used as models?
- How tightly integrated should such a system be with the systems dedicated to brokering trips?
- Is a “wallet” system (where the rider has visibility into their resources and can use them across multiple providers at their initiation) worth pursuing, or should the focus be on payer-initiated services across multiple providers? Or both?
Possible project directions:

1. It may be possible to provide some limited wallet functionality on mobile devices using app-to-app “deep linking,” wherein an OC/OC app could have some limited access to some of the functionalities of an ORCA app.
2. The new ORCA project has included in its roadmap (phase 3, 2024-2026) the ability for users to grant 3rd parties access to their digital wallets (greater access than with deep linking, described above). The OC/OC system could use this type of access in some scenarios.
3. Develop or procure a system separate from ORCA that is more focused on specialized services, the needs of 3rd-party payers, and state-wide useability. Such a system could allow balance transfers between participating (non-ORCA) organizations.
4. SoundTransit’s Digital Assistant will include a fixed route fare calculator that could be leveraged by the OC/OC system, though it does not currently include calculations for specialized services.

Cross-cutting Concerns

The following areas are not components themselves but instead are critical elements that apply to all components and are presented here to document their importance.

1. **Accessibility.** A significant portion of public-facing technology tools are designed for rapid deployment and aimed at non-disabled users. Efforts to ensure usability by people with disabilities are often limited or absent. Ensuring accessibility for a wide range of users will require thoughtful planning and engagement with a diverse range of riders who can test the systems in ways that mirror real-world scenarios.

2. **Data privacy.** Personally identifiable information (PII) must be managed with proper controls at every level in terms of the software’s security and on the human side, through policies and procedures for every participating organization. Plain language user-facing privacy policies will need to be put into place. Aggregated data used for evaluation will need to be reviewed to ensure that individual data cannot be extracted.

3. **Assistors.** It is often the case that riders need assistance accessing mobility options. This can include family members, neighbors, social workers, schedulers, etc. Assistors can come in at any stage and connect to any of the components described above. It is important to consider how assistance can be provided effectively and securely for all users: riders, assistors, and transportation providers.
4. **Reporting.** Every element of the system that generates data will need to have a corresponding reporting capability to monitor the system's performance, track KPIs, and comply with funder and legal requirements.

5. **Data Collection and Evaluation.** The early design needs to be clear on what problems each system is solving and what key performance indicators (KPIs) will measure progress towards stated goals both for the systems themselves and ways the systems can help evaluate the transit network it is describing. Regardless of whether the OC/OC is directly involved in data collection (for example, phone-based surveys could be used and would reside outside the system), KPIs need to be designed early in the process to collect baseline data. Reporting systems are appropriately designed to do what's needed.

**Glossary of Terms**

GTFS – General Transit Feed Specification – A standard format for public transportation schedules and associated geographic information.

GTFS-flex – A GTFS addition that adds the ability to describe areas for a transit route that may have a deviated route service area.

Middleware - software that acts as a bridge between an operating system or database and applications, especially on a network.

OpenTripPlanner – a multi-modal trip planning tool that uses open-sourced data.