

DOCUMENT 1

Part III- Project Details

- 1. The document is being resubmitted with the non-permitted transportation carrier selected for SMS Transportation Services Inc.**

Part III – Project Details

1. Project Readiness and Technical Capacity

- A. Provide the following information for all entities that will provide the on-demand WAV services, including Applicant and any third-party contract providers, as applicable.

Entity Name	Butterfli Technologies Inc.
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier N/A Butterfli is not a Charter-Party Carrier. Listed below are the providers that will perform services for Butterfli for the San Diego Access for All Program.
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	Initially, for start-up, 6 Vehicles will be scheduled for usage for the program and will be operated by the service providers listed below.
Projected date when on-demand WAV services will begin	12/1/2024, This date is based on the project start date of November 1, 2024. Services will start within 30 days.
Anticipated hours of operation	7:00 am to 6:00 pm Monday through Friday (May change based on demand) 8:00 am to 3:00 pm Saturday and Sunday (May change based on demand)

Entity Name	SMS Transportation Services YES Hold Charter Party Carrier Permit
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☒ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	6 Vehicles in rotation to be operated by SMS for San Diego AFA Service. Full Fleet available 50 vehicles.
Projected date when on-demand WAV services will begin	12/2/2024
Anticipated hours of operation	7:00 am to 6:00 pm Monday through Friday

Entity Name	Care 1 Transportation Services YES Hold Charter Party Carrier Permit
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit

	☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	2 Vehicles in rotation to be operated by Care 1 for San Diego AFA Service. Full fleet available 8 vehicles
Projected date when on-demand WAV services will begin	12/2/2024
Anticipated hours of operation	7:00 am to 6:00 pm Monday Through Friday 8:00 am to 3:00 pm Saturday and Sunday Optional: Friday, Saturday, Sunday 7:00 pm to 11:00 pm

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

Entity Name	
Charter-Party Carrier Status	☐ Holds a Commission-issued Charter-Party Carrier permit ☐ Non-permitted transportation carrier
Number of WAV vehicles in current fleet (or projected number if purchasing/leasing by Notice to Proceed date)	
Projected date when on-demand WAV services will begin	Click or tap to enter a date.
Anticipated hours of operation	

- B. Describe what experience the Applicant has in managing a grant-funded project. Include examples such as prior grant-funded projects or other instances when Applicant provided services on a reimbursement basis to another party and/or was subject to regulatory or other monitoring requirements.

The San Diego AFA program operated by Butterfli will mirror the successful program currently operated for the Metro Los Angeles AFA program. Metro highly regarded the Los Angeles AFA program. References from the Metro programs manager is available on request.

Access for All Los Angeles—Butterfli operates the Los Angeles Access for All program under Los Angeles County Metro. Butterfli received the largest grant amount for the funding year and is currently the staff recommendation for 2024-2025 (the final vote by the Metro board will be June 2024).

Butterfli operates 10 vehicles in 3 of the 5 Metro Zones in the county of Los Angeles. AFA provides services primarily for WAV riders, persons with disabilities, and seniors with disabilities in underserved communities. Butterfli performs 1,600 to 2,100 rides per month, and over 65 of the rides are consistently for individuals in wheelchairs, and 97% of the rides are on-demand and performed within 12 hours of booking the ride. The total number of rides performed as of May 2024 is 11,000

- **Budget:** \$4.1 Million, one-year program, 2023-2024

EnableLA- A partnership with HKMC (Hyundai Kia Motor Corp.). This 8-month pilot program operated in greater Los Angeles. The pilot was successful, and Butterfli continues to operate the program to collect data for HKMC. Butterfli uses a single provider to perform the service. The program uses WAV-modified vehicles designed by HKMC in partnership with MoceanLab and Butterfli. The pilot operated for eight months with HKMC, and then the vehicles were donated to Butterfli. These vehicles were enhanced for a better user experience with input from the Butterfli team and its Round Table influencers. Butterfli worked with the HKMC team and performed outreach and marketing.

- **Budget:** \$2.3 Million over an active 9-month pilot program. 2020-2021

FlexWAV- A Grant-funded pilot program that provides discounted rides to eligible WAV consumers and persons needing assisted transportation. Butterfli continues to provide this service for the community in a designated Los Angeles area.

- **Budget:** \$525,000.00 1 Year pilot program. 2018-Current

FlexLA- A public-private funded program with Butterfli in partnership with FastLinkDTLA, LA Metro, LADOT, LACI and Moovel (a Daimler Mercedes Benz Company), and SMS Transportation. Provided shuttle service in DTLA after hours Monday through Sunday. ButterFLi managed the pilot for the participating team.

- **Budget:** \$1.3 Million over 14 months. 2019-2021

ButterFLi WAV Mobility Round Table- Butterfli, in partnership with HKMC (Hyundai Kia Motor Corporation), organized a group of influencers in the disability community to participate and provide useful, impactful feedback about the transportation challenges in the WAV community. This group's input ultimately helped HKMC with their R & D to design an in-market WAV vehicle prototype.

- **Budget:** \$25,000.00

2. Coordination and Program Outreach

1. Describe how the Applicant will publicize and promote the available on-demand WAV services to disability communities. Provide an outline of the planned outreach activities either in the space below or as an attachment and include the proposed dates, any partners, marketing,

and promotional materials that will be used, and any other details.

Butterfli is uniquely qualified because of our success with the Los Angeles Access for All program and our extensive experience in administering WAV services. We will use proven methods to promote the program and reach the disability community. This outline displays our method and approach to promoting and advertising the program. Butterfli has relationships with ADA advocates and organizations in the San Diego Community. We will use these relationships and our local advocates and influencers to identify the best media and outreach touchpoints.

- Work with our local PR and media firm to identify and meet with disability community organizations and advocates to promote and advertise the program.
- Start grassroots advertising directly in the communities identified as primary service areas.
- Work with local organizations to partner with and engage them in advocating for the program and using our ride-booking portal to book rides for WAV riders.
- Work with city officials to identify the best catchment areas for short-term visitors and work to enact best practices for promoting the service for these individuals. Having a deep link in the Uber and Lyft apps could be a method for promoting the service to visitors and travelers.
- Develop a webpage for SD AFA information and Ride booking.
- Work with local community advocates to educate them about the program and how WAV users can participate and use the service.
- Meet with local community leaders to identify organizations and communities needing WAV service.
- Develop digital and printed materials and collateral for distribution.
- Identify the best media outlets and engage social media platforms with specific Access for All advertising.
- Engage grassroots community activists and advocates to penetrate the community.
- Expand the Butterfli Round Table of Influencers to include local San Francisco communities.
- Activate our local community engagement team to promote the program internally.

Target and Partner with Organizations and Advocate Partners within the San Diego Community

- Butterfli's Round Table Influencers and Advisory Board Members
- The ARC San Diego- Advocate group for persons with disabilities
- Regional Centers in San Diego- Administrators for persons with disabilities
- People with Disabilities Foundation- Advocates for persons with disabilities
- Senior and Disability Actions Group- Advocates for persons with disabilities
- Disability Rights of California- Advocates for persons with disabilities
- Local Community organizations that focus on people in underserved areas and advocate for people with disabilities in San Diego
- City Council thought leaders for the disability community for people in disparity communities
- San Diego County transportation coordinators for the SD AFA service areas
- Community Non-Profit Organizations (CBO's) partnerships

For LA AFA, we partner with over 102 Organizations and groups that service the disability and senior communities.

2. Describe how the Applicant will market and promote public awareness of its on-demand WAV services in both low-income and minority areas as well as with populations with limited English proficiency. Provide the methods and strategies to be used and explain how the Applicant will know whether its efforts effectively reach these populations.

Butterfli will initiate a full marketing and outreach campaign to publicize and promote the San Diego AFA program in the communities that use the on-demand WAV services. Promotional materials can be in multiple languages as necessary. The customer care call center provides bilingual representatives during work hours. Additionally, the automated voicemail and IVR can be designed for multilingual messaging for non-English-speaking individuals.

Butterfli's outreach team will work with our community engagement partners to initiate and perform the following:

- Develop a webpage dedicated to San Diego AFA on the Butterfli Website.
- Develop and distribute collateral and materials to AFA partners, including their websites or other media outlets.
- Launch a digital and social media campaign to advertise and promote the San Diego AFA program.
- Arrange meetings with local community-based organizations to promote the program.
- Partner with community-based organizations to assist the community in understanding the program and booking rides using their unique real-time ride-booking portals.
- Meet and collaborate with local political and government leaders and transportation coordinators to promote and advertise the program.
- Work with local council members and supervisors to identify specific preferred organizations within their constituent's neighborhoods that we can partner with to promote the program. This initiative will focus on low-income and minority areas.
- Cost-friendly TV, radio, and cable media outlets should be used to advertise the program.
- San Diego AFA drivers will distribute program information on board to hand out as promotional materials and to provide information about the program.

Butterfli will provide feedback statistics and information from ridership data and digital media sources to identify the most effective methods and means of advertising and ridership.

Butterfli regularly conducts customer surveys and has a full-service customer engagement call center with live operators from 8:00 a.m. to 5:00 p.m. (these hours may adjust as needed). There is also an after-hours emergency service and voicemail capability.

Butterfli regularly meets with our influencers, community engagement partners, political advocates, and community-based organizations to gather information and feedback from the community regarding the services.

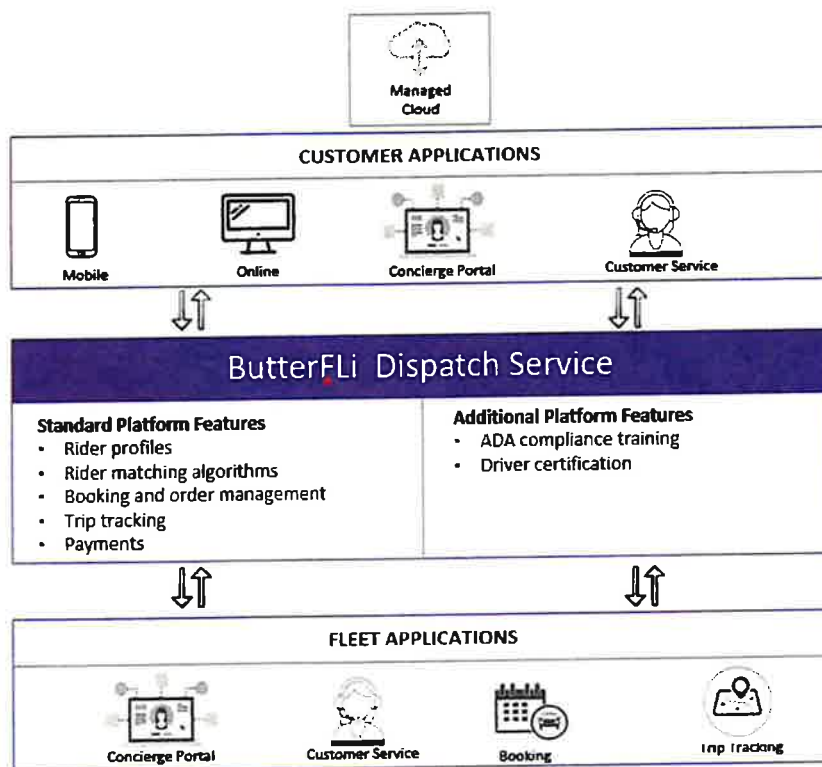
See Attachment #1- "Sample Program Collateral"

3. Will the Applicant's on-demand WAV services be made available to individuals who do not have a smartphone, internet, or otherwise need additional assistance in requesting the service? What alternative means will the Applicant use to provide its services to these users?

The Butterfli San Diego AFA program on-demand WAV services will be available to individuals without smartphones or the internet or who otherwise need additional assistance requesting service.

Butterfli offers a full-service customer engagement call center and a website that is available to the public 24/7. There are live operators from 8:00 a.m. to 5:00 p.m., and voicemails are returned immediately or the next business day, depending on the call type. Emergency calls are responded to immediately.

Butterfli's AFA program in Los Angeles has been highly successful. Our operators and logistics specialists are trained to provide prompt, friendly, professional service to the public. We will use this same call center with agents dedicated to the San Diego AFA program, using agents trained to help and information specific to the San Diego customer base.



4. Describe how the Applicant will actively involve the disability community in the planning and development of the project, through the engagement of groups such as a disability-led advisory council or having input from individuals with Lived Experience on their Board of Directors. Please

provide details about how current or proposed procedures will ensure that the input of individuals with disabilities is incorporated into the planning and development of the program.

Butterfli will actively involve the disability community in the planning and development of the project through the engagement of our Butterfli Influencer Round Table Advisory Board, Disability-led advisory council and individuals within the disability community.

Butterfli's business model is built on experience within the disability community. The owners have owned and operated a NEMT transportation company for over 20 years that transports for Los Angeles County Regional Centers and other health care and disability organizations. Butterfli was founded on this experience with a focus on introducing real-time, on-demand technology to enhance the rider experience and provide equity for individuals that need assisted transportation.

Our current business model includes regular collaboration with individuals who experience disability due to limited mobility options because of physical or intellectual disabilities, age, health or other reasons. We created our Butterfli Round Table of Influencer and Advisory Board because we understand the need to engage individuals directly for input, ideas, experiences and advice. We have regular Round Table Forums where we invite individuals that experience the inequity because of their disability or the lack of viable affordable transportation options. Over the past 2 years Butterfli hosted 5 events that provided a platform for these individuals to express their experiences and also provide input to Butterfli on how we can engage the community to better meet their needs and provide a better customer experience. This year we included a round table specifically for our LA AFA riders to express their experiences using the LA AFA program. Our social media and website highlight our AFA team members and our team of advocates and influencer. www.gobutterfli.com. We can provide video footage of these meetings by request.

We understand the inequity in transportation today because we engage and we listen to the public. There is disparity for individuals who have limited options due to living in an underserved area or who have limited income. Butterfli also surveys our clients and riders. We perform 400 to more than 500 rides per day to WAV riders so we must engage our ridership and the community to ensure the best customer experience. We currently provide 170 to 200 rides per day to the Los Angeles AFA program riders.

Our approach to the San Diego AFA program includes collaborating with the local San Diego disability community to join our influencer advocates to provide their experiences and ideas about how we can make the program the best rider experience possible.

3. Safety

Describe the Applicant's procedures for preventative and routine vehicle maintenance. In addition, describe the Applicant's policies and procedures related to the rules of conduct for drivers providing WAV service.

Butterfli is a transportation administrator. We do not own or operate any vehicles. We have contract agreements with qualified NEMT or specialized transportation providers to perform the customer ride services. We have a full network of qualified, certified transportation providers that have passed the Butterfli compliance requirements to provide ride services as a part of the Butterfli network.

Transportation providers in the Butterfli network must meet all requirements to become a qualified provider for Butterfli. This includes verification of the company, their vehicles and drivers. Our AFA fleet providers must ensure:

1. Meet required legal company entity requirements, business license, Secretary of State Registration, or other requirements based on the service area.
2. Meet Insurance requirements to perform on particular projects.
3. Drivers must have updated CA drivers license, first aid, CPR, DOT Medical card, local transportation permits or licenses, and cleared background and drug/alcohol testing. Some projects require TB testing, live scan, or passing an internal background test for a specific agency. All drivers are required to be enrolled in the CA DMV Employee Pull-Notice Program. A list of the Butterfli Compliance Requirements is located in the attachment section of this document.
4. Vehicles are regularly inspected. There is a Butterfli inspection to ensure vehicle readiness, and a required vehicle mechanical inspection. Drivers are required to complete a Daily Vehicle Inspection Report pre and post trip. Providers vehicles must be inspected daily, and 90 days inspections are required for preventive maintenance. In addition, Butterfli requires providers to have a regular 3rd party vehicle inspection 2 times per year, and Butterfli performs quarterly compliance inspections.
5. Drivers must complete the Butterfli training modules, including, passenger safety including wheelchair safety, vehicle behind the wheel training. A Complete training list is attached at the end of this document in the attachment section.
6. Butterfli will ensure that all drivers meet the requirements outlined for this Grant Award.

See Attachments # 2 "Compliance Checklist"

See Attachment # 3 "AFA Readiness Checklist"

Background Checks

Does each entity that will provide the on-demand WAV services:

- Currently perform background checks on each of its potential drivers, based on the driver's social security number and not just the driver's name, and in the national criminal database and national sex offender database? **YES**

☒ Yes

☐ No*

- Ensure that any person who has been convicted within the past seven years of driving under the influence of drugs or alcohol, fraud, sexual offenses, use of a motor vehicle to commit a felony, a crime involving property damage and/or theft, acts of violence, or acts of terror not be permitted to provide AFA services? **YES**

☐ Yes

☐ No*

- Ensure that any potential drivers with convictions for reckless driving, driving under the influence, hit and run, or driving with a suspended or revoked license are not permitted to be an AFA driver? **YES**

☐ Yes

☐ No*

**If the answer to any of the above questions is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with each of these background check requirements at the time of grant agreement execution (see the Timeline in the Call for Projects for the anticipated date).*

Insurance

- Does the Applicant and each entity that will provide the on-demand WAV services have levels of insurance that are equivalent or higher than what is required for charter-party carriers under [General Order 115.2](#). Further information on SANDAG's insurance requirements can be found in the Call for Projects. **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how the Applicant and each entity that will provide the on-demand WAV services will be able to comply with the insurance requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Driver training

- Does each entity that will provide the on-demand WAV services have certification that its drivers have completed WAV driver training on transporting people with disabilities within the past three years including but not limited to sensitivity training, passenger assistance techniques, accessibility equipment use, door-to-door service, and safety procedures? **YES**

See Attachment #4 "Driver Training" Outline.

☒ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that

describes how each entity that will provide the on-demand WAV services will be able to comply with the driver training requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Controlled substance and alcohol testing

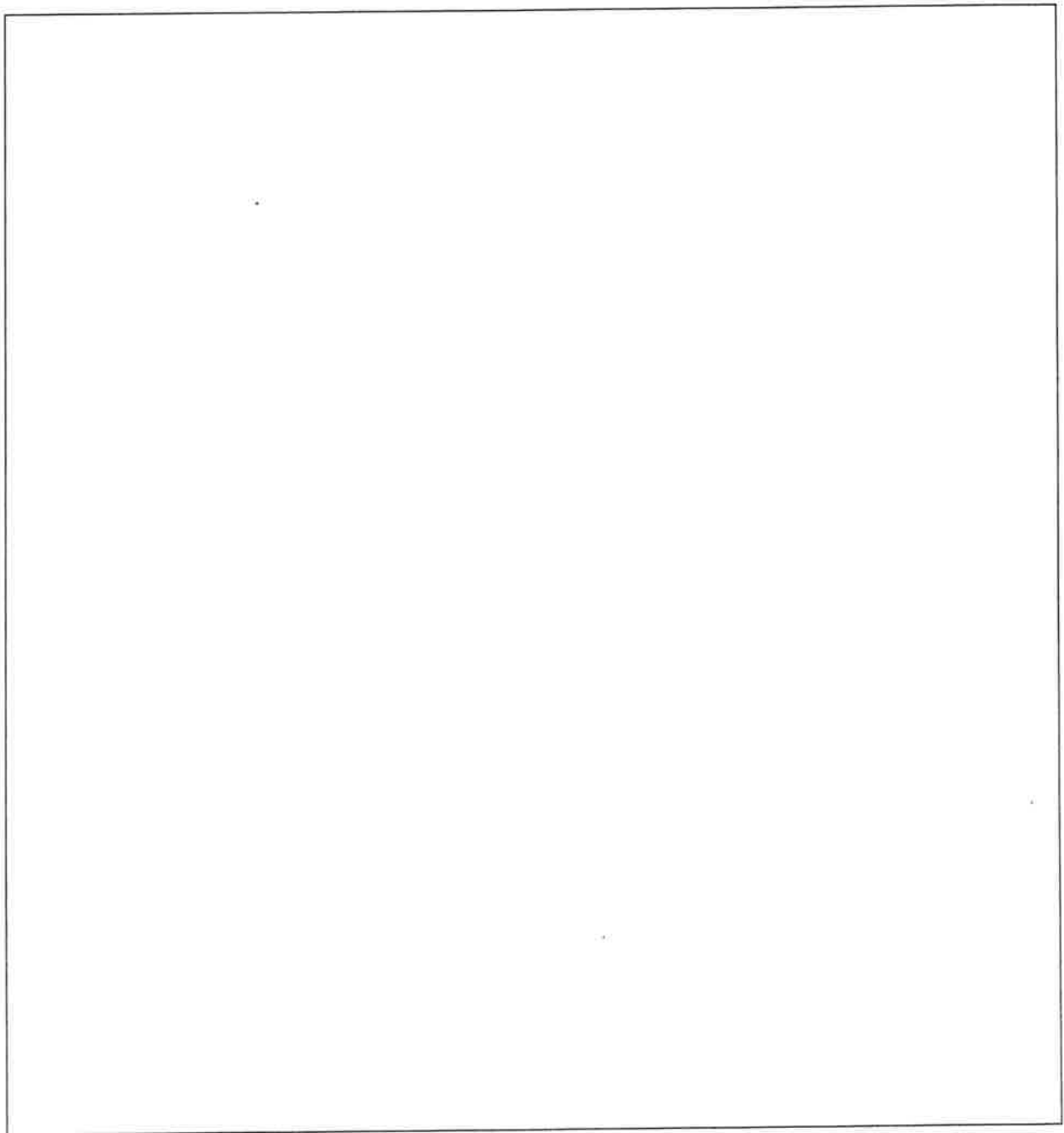
- Is each entity that will provide the on-demand WAV services enrolled in a controlled substance and alcohol testing program? **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the controlled substance and alcohol testing requirements at the time of grant agreement execution (*see the*

Timeline in the Call for Projects for the anticipated date).



Secretary of State registration

- Does each entity that will provide the on-demand WAV services have its articles of incorporation filed with the Secretary of State? **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the Secretary of State registration requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Motor Carrier Profile with CHP

- Has each entity that will provide the on-demand WAV services completed the [California Highway Patrol \(CHP\) 362 Motor Carrier Profile](#) and obtained a CA Number from the CHP? Please note that this requirement is not applicable to service providers that are a Social Service Transportation Provider. **YES**

☐ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the CHP Motor Carrier Profile requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*). If a service provider is an exempt Social Service Transportation Provider, please indicate below.

Inspection

- Does each entity that will provide the on-demand WAV services have certification that all WAVs have

been inspected and approved to conform with the American with Disability Act Accessibility Specifications for Transportation Vehicles within the past year, including the "19-point" vehicle safety inspection as required by the CPUC under [General Order 157-E](#)? **YES**

☒ Yes

☐ No*

*If the answer to the above question is No, provide additional information in the space below that describes how each entity that will provide the on-demand WAV services will be able to comply with the CHP Motor Carrier Profile requirements at the time of grant agreement execution (*see the Timeline in the Call for Projects for the anticipated date*).

Vehicles proposed to be used for this service will comply with this requirement.

See Attachment #5 '3rd Party Vehicle Maintenance Inspection Report'

4. Operational/Implementation Plan

- A. Describe how the Applicant will have sufficient WAV fleet size to be able to meet current demand for service. Explain how this can be Scalable to meet future potential demand for on-demand WAV service. Include an estimate of the hourly number of available WAVs resulting from the proposed service.

Butterfli will provide a sufficient number of WAV vehicles to meet the demand for service.

Butterfli will use current qualified approved transportation providers to deliver the service for San Diego AFA. This document lists the providers in the "Project Readiness Technical Capacity" sections on pages 6 & 7. Each provider will be assigned a designated service area and will ensure service delivery.

It is not our typical business model; however, Butterfli will consider using Uber and Lyft upon approval from the SANDAG proposal management team. We have found that some AFA programs use these TNCs while others, like Los Angeles, prefer WAV vehicles. If necessary, Butterfli is prepared to operate a full fleet of WAV Butterfli network provider vehicles for the San Diego AFA program.

Service will be provided for persons needing assisted transportation, including seniors and persons with disabilities, focusing on low-income and underserved areas. Service will be door-to-door and curb-to-curb based on the customer's needs. Trips will be provided for NEMT, shopping, and other lifestyle travel in areas where paratransit is insufficient, inappropriate, or unavailable.

Butterfli will Dedicate at least two vehicles to service each City including Vista, Escondido and San Marcos. More details regarding the selection of these cities is located further in this application. This may be adjusted as the program matures and we collect data for high-demand areas. Our approach to our supply is to immediately start with one vehicle in each City and phase in the second vehicle based on demand.

Our model is scalable to meet the demand we propose. Butterfli currently seeks additional funding from other Grant programs to augment the services. Butterfli is prepared to scale the program to offer more on-demand services should that funding materializes.

The operating hours for the San Diego AFA program will be Monday through Friday from 8:00 a.m. to 5:00 p.m. and Saturday and Sunday from 9:00 a.m. to 3:00 p.m. Based on ridership and demand, we will consider using alternate service hours to accommodate Friday, Saturday, and Sunday evenings. These hours may be changed based on the ride data captured, which will determine the best times of operation for high demand.

Butterfli will ensure that the service request/reservation hours will be 5:00 a.m. to 9:00 p.m., 7 days per week, to the public. The response time during business hours will be 1 hour for on-demand and less than 12 hours for requests made outside of the hours of 5:00 a.m. to 9:00 p.m. Note these hours of operation and vehicle supply are based on the total grant award and can be adjusted based on the amount of award and funding. This proposal is based on having 6 vehicles during the hours of operation.

- B. Describe the project's operational plan, including details on the on-demand WAV service to be provided and a description of day-to-day project operations. Include how the on-demand WAV

service will be provided on a consistent basis to ensure the Applicant will be able to meet the demand in its service area.

Butterfli will provide an on-demand transportation service for individuals who need assisted transportation. This includes people who need WAV vehicles and personal door-to-door assistance.

Butterfli's operations include the following:

- A full-service, 24/7 customer care, and call center with telephone operators and dispatch and logistics specialists. Live operators are available from 7:00 am to 7:00 pm M-F and 8:00 am to 3:00 pm on Saturday and Sunday. There is an after-hours emergency service provided by on-call operators and 24/7 voice mail that is returned within 24 hours after hours and within one hour during business hours.
- Butterfli uses a telephone operating system that offers 24/7 voicemail, voice recording, recorded messaging, multi-language messaging capability, call monitoring and tracking, and call center activity reporting.
- Rides will be booked on-demand in real-time. Customers who do not have access to smart devices or computers or who wish to book a ride with a live operator can book rides via telephone. Butterfli will also partner with community-based organizations with access to the Butterfli real-time online booking portal. Customers can also book online through the San Diego customized web page on the Butterfli website. In addition, our consumer app can be used to book rides from a smart device.
- The San Diego AFA program will be managed through our technology platform. The platform can book rides, capture data for reporting, track rides in real time, provide status updates and notifications via SMS or via telephone, and capture the required data points for the CPUC quarterly data reports.
- Rides are tracked and verified in real time via the Butterfli Admin portal.

A typical rider experience:

- The ride can be booked via the portal, online through the website, by telephone, or by customer app.
- The system will consider the time and location and auto-calculate the mileage from pick-up to drop-off points to determine the distance and whether the request is within the mileage range based on the GPS estimates. The customer's address, name, and phone number are entered along with the San Diego AFA Access Code. The customer or coordinator can also enter special notes for the passenger.
- The system will book the ride and send a confirmation notification to the booking party.
- The customer engagement center, dispatch, and logistics agents can track the booking and ride in real time. The customer or transportation coordinator can also track the passenger's ride on the portal or via the consumer app.
- The system will notify the customer and coordinator about the status of the ride, pick-up time, and vehicle location and will notify the customer upon arrival. The driver will text or call the customer once they arrive.
- The system captures the ride data at each activity touchpoint for exact ride statistics.
- Customers can contact the call center at any point during the ride.

Driver Operations:

- Drivers are assigned to rides as booked via the Butterfli platform. Drivers will accept the rides and perform the trips.
- Drivers must ensure safety precautions are performed for each task.
- Drivers provide professional service to all clients and will contact dispatch or logistics agents in an emergency if there are questions or to report incidents.
- Drivers perform vehicle safety checks and complete a DVIR pre and post-trip.

- C. Describe the Applicant's strategy to ensure completed on-demand WAV trip Response Times are reasonable and comparable to what a non-WAV requestor would receive. Explain whether the Applicant will progress toward improving Response Times and WAV presence and availability over the grant period, including a proposed strategy and goals the Applicant expects to achieve. Provide an estimate of the improvement in response times over the Baseline Data provided in Part II.

Butterfli services are managed by our operations staff in real time using our technology platform. Our agents can track rides, obtain ride status, and communicate with customers and drivers anytime.

Our operations supervisors and managers consistently review system data and reports, monitoring real-time rides on our performance screens and the portal. Operations is notified of late arrivals or customer delays. Drivers must report events to our dispatch agents to prevent excessive late response times. Butterfli's technology books ride using smart logic to ensure there is adequate time for travel, traffic, or unique customer circumstances, such as patients who may require extra assistance that requires additional time.

Our operations team is responsive to the customer's needs, aware of ride activity, and works to ensure on-time performance.

Butterfli's current performance with Los Angeles Metro is 95% on-time response time. We anticipate a similar response time for San Diego AFA. The current percentage of rides that are WAV is 67%, meaning 67% of customers have wheelchairs. However, 100% of the vehicles used for Los Angeles AFA are WAV vehicles. With the exception of possible services performed by Uber or Lyft, the vehicles used for SD AFA will be WAVs.

Los Angeles County Metro Access for All program has been very successful. Here are some statistics for August 2023 through May 2024:

- Total number of rides per weekday 120 to 230
- Average number of rides per month 1,700 to 2,200
- Over 11,000 provided as of June 14, 2024
- Overwhelming demand for current supply. 95% of the time, we reach supply capacity for available ride times.

- D. Describe the Applicant's proposed methodologies and procedures for ongoing monitoring and evaluation of the project's effectiveness in providing on-demand WAV service. What steps will be taken if the Applicant's original goals are not achieved?

Butterfli has a proven methodology and procedures for monitoring and evaluating the project's effectiveness in providing on-demand WAV service. We regularly review and perform audits, as well as service levels, customer service, and ride activity. This is a description of our review and monitoring for the operation:

Customer Engagement and Call Center Operations

- Full-service customer engagement operations with supervisors on duty
- Provide scripts specific to the client's needs- updated as needed
- Representatives are trained and receive refresher training as needed
- Regular agent phone monitoring and skills and performance evaluations
- Phone call recording and review. Calibrations with operators
- Consistent real-time monitoring of the phone system and review of calls and reports
- Weekly performance evaluations for agents based on phone stats and public feedback
- Regularly review and update processes and procedures based on trends and changes
- Regular training on technology features. Regular review of tech performance and consistent improvements to the portals and applications to enhance services
- After-hours on-call operators assigned for off-service hours and 24-hour voicemail. Emergency on-call operators are available.
- Experienced supervisors and managers who manage the daily operation
- Daily review of Butterfli system data for performance
- Daily report review for ride activity
- Daily reconciliation of rides performed
- Conduct regular customer and client surveys for feedback and evaluation

Ride Service

- Regular service reviews with providers to ensure high-performance levels
- Require regular safety and driver training
- Review ride activity from the data reports and work with providers to identify performance issues
- Review real-time data on the system to identify performance issues
- Track ride activity on the portals and screens to ensure on-time performance.
- System provides notifications for late pick-up/arrivals and for off-route vehicles
- System provides activity reports and notifications for each touchpoint and ride activity
- Compliance specialists conduct safety checks, vehicle inspections, and rider security while vehicles are in service in the field.
- Gain Rider feedback for performance and service to improve the rider's experience

Vehicles and Maintenance

- Providers must comply with compliance onboarding to ensure transportation providers meet requirements. The Company, Vehicles, and Drivers must be verified to participate as a provider for Butterfli.
- Providers must pass internal maintenance and an external 3rd party vehicle inspection for vehicles in service for Butterfli on a regular schedule.
- Butterfli regularly audits providers files.
- The technology administrative portal maintains driver and vehicle records to keep the information updated and current.

A large, empty rectangular box with a thin black border, occupying the upper two-thirds of the page. It is intended for the applicant to provide a detailed response to the question below.

- E. Explain how the Applicant's proposed service area will address existing gaps in WAV service where the need is greatest, including areas not adequately served by transit and paratransit. Describe the Applicant's strategy to provide on-demand service to directly address existing gaps in WAV service.

Our proposal team worked with our consultants and advocates to identify the following service areas for the San Diego AFA service: Vista, San Marcos, and Escondido and other outlying cities within 10 miles of these cities. These cities were selected based on research and data collected from the County of San Diego that identified census for the poverty levels within the County.

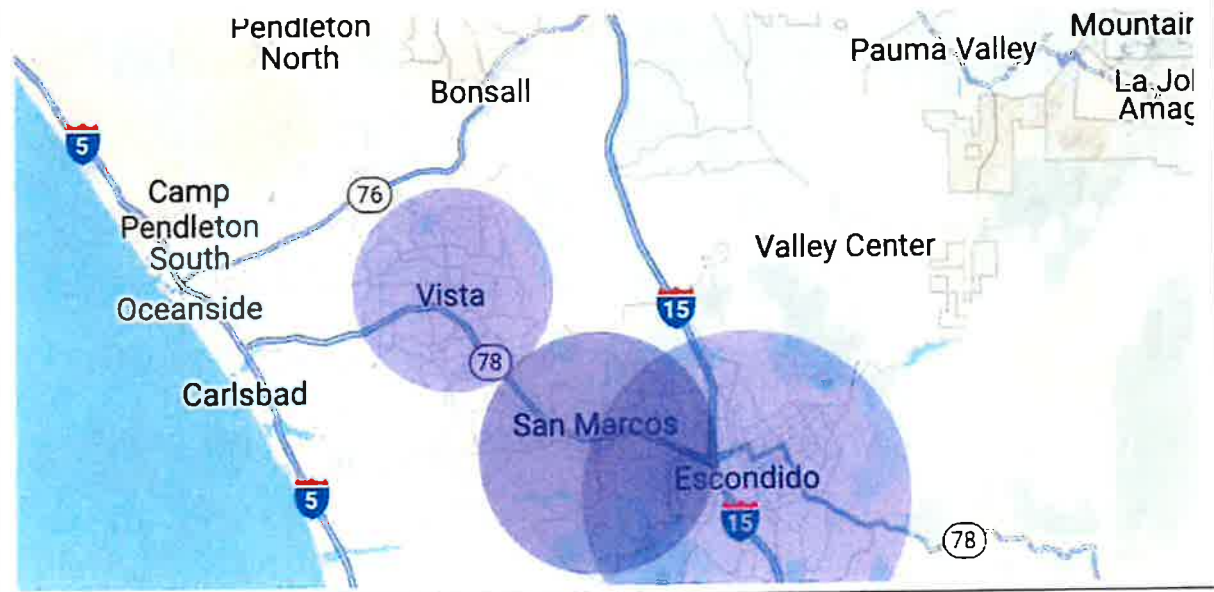
Butterfli also collaborated with our team of advocates and influencers that have knowledge about services and disparity in assisted transportation to get feedback regarding services and disability needs within these cities. These 3 cities met the criteria for underserved area, low income and high poverty rating, lack of services, and were in a central clustered area which meets the criteria for our program model for San Diego AFA given limited funding available. See Service Area Map below.

One of the primary objectives is to provide services to fill gaps in the current service available for customers. Butterfli has selected areas that we identified as having gaps in service due to lack of WAV supply or not adequately served by transit and paratransit.

The approach to this is to ensure we connect with local disability and public service groups to identify and target groups and locations that are underserved due to lack of resources, programs, income or other factors related to their disability such as age and intellectual challenges.

Butterfli's script for callers requires the customer to identify that they meet the requirements to participate in the program. First, the customer must state that they have a qualifying disability, and that they need assistance traveling because of limited physical mobility or intellectual disability. The customer must also identify if they use a mobility apparatus such as a walker, cane, or wheelchair or other mobility devise.

Butterfli continues to work with advocates, and local officials to ensure we target groups and organizations that have need for the services provided for the AFA program. This ensures that we allow a fair and equal opportunity for riders with the greatest need for the service.



5. Project Budget and Cost Efficiency

- A. Provide a proposed project budget using the Project Budget Template provided with the Call for Projects that aligns with the tasks in the Project Scope of Work.
- B. Describe the Applicant's methodologies and procedures for ongoing monitoring and evaluation of the service's cost efficiency. What steps will be taken by the Applicant to ensure the services provided are cost-effective?

The Budget Template is included as an attachment to this document.

Butterfli's management team works with the client to ensure we deliver the most cost-effective services. Our financial and management teams review financial reports and data together to identify expenses that can be adjusted to achieve the most cost-effective outcome. This includes reviewing staffing and provider costs and adjusting as needed.

Butterfli presents this program fee structure with a per-vehicle-hour rate for the transportation providers. This allows the opportunity for multiple riders for rideshare and ensures greater availability for on-demand ride performance. We find this model to be effective and results in the highest level of performance with minimal delays in on-time service.

It is Butterfli's goal to meet the community's needs and we are willing to shape the program based on SANDAG's budget and overall program allocation. This grant funding request amount is based on the amount of available funding. This project can be scaled to meet the grant award amount.

- C. Please describe efforts that have been or will be made to diversify and pursue funding from

sources other than the AFA program, including developing the capacity to fund the project beyond the Grant Term.

Butterfli is an assisted transportation administrator who consistently seeks funding sources for these programs. It is a private company that works with organizations and investors interested in funding programs like AFA. Butterfli will continue to seek funding sources, including funds within the City of San Diego allocated for Senior Transportation and other outside sources.

6. Innovation

- A. Describe any creative solutions or innovations in your project that address existing needs or barriers which could be applied to other services in the region or for other AFA programs across the state.

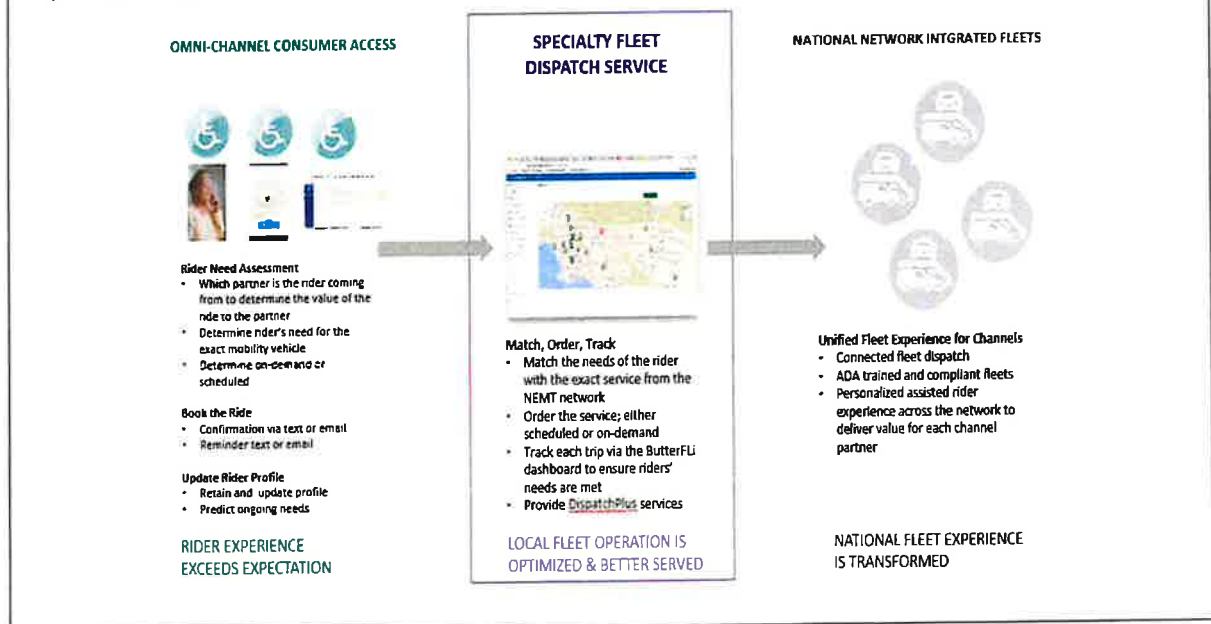
Butterfli's creative approach to the Los Angeles AFA program includes innovation in that our technology platform was enhanced to include features specifically for AFA. The ridership is unique with specific technological needs. For example, our technology team developed a route system that is unique to the type of service provided for AFA. New features were added to collect rider information (non-HIPPA), and customer notes regarding safe travel for the customer.

The technology was enhanced to include a feature that alerts our dispatch team if a ride veers off the scheduled route. This assists our team in ensuring safe travel for the passengers. Our tech application also provides notifications throughout the ride, allowing the customer and coordinators to track the ride and receive updates to their smartphones via SMS text.

Butterfli improved the client experience by enhancing our client portal, which allows organizations to book rides for their customers and consumers. This portal also tracks rides, reports, real-time notifications, updates, and alerts. The system also allows passengers to book a ride online through the Butterfli website, which includes full program information, maps, program guidelines, and other details about AFA.

Our marketing, outreach, and digital media partner delivered innovative digital materials and received the prestigious "NETTY" Award in April 2024. The award was for digital marketing for their innovative approach to accessible transportation in Los Angeles County. The impact of the work resulted in 15k visits, 13k social media impressions, and 10k ride bookings! We are pleased to have this group as our partners for Los Angeles, and they will work with us for San Diego AFA as well.

The messaging for the Los Angeles AFA program, the technology, and our dedicated trained management, staff, and provider drivers have resulted in the best, most innovative customer experience, and we are very proud of the success.



- B. Does the project include any efforts at ensuring environmental sustainability, such as grouping

trips and use of alternative fuels or clean air vehicles? Describe in the space below.

Butterfli is committed to clean air by using alternative fuels. We are excited to explore the options with our transportation providers urging them to utilize these methods and vehicles. Butterfli intends to purchase one clean energy vehicle to be used for SD AFA upon approval of funding.

Butterfli understands that ride-sharing is a great alternative for limiting vehicle usage, which results in lower emissions. Should San Diego AFA approve and accept ride-sharing, Butterfli will implement this into our business model.

DOCUMENT 2

**Copy of Transportation Provider, Care 1
TCP Letter**

DEPARTMENT OF CALIFORNIA HIGHWAY PATROL
P.O. Box 942898
Sacramento, CA 94298-0001
(916) 843-4150
(800) 735-2929 (TTY/TDD)
(800) 735-2922 (Voice)



January 2, 2024

File No.: 42.A14455.042.LETR01

CARE 1 TRANSPORTATION LLC
1700 Santa Fe Avenue Ste 301
Long Beach, CA 90813

SUBJECT: Assignment of a California Carrier Identification Number

Your company has been assigned California Carrier Identification Number (CA): **639106**

The assignment of a CA number allows the California Highway Patrol (CHP) to have immediate access to information about your company in case of an emergency. It also allows the CHP to make better use of its inspection personnel by monitoring the overall safety operations of carriers.

Your assigned CA number must be displayed according to Section 34507.5 of the California Vehicle Code (CVC) (e.g., on both sides of at least one vehicle in a combination as described in Section 34500 CVC, any motortruck of two or more axles that is more than 10,000 pounds gross vehicle weight rating, or any other motortruck or motor vehicle used to transport property for compensation). Carriers displaying any one of the following valid numbers on their vehicle(s) are not required to display a CA number: a CAL-T number issued by the California Public Utilities Commission (PUC) to household goods carriers; a TCP or PSC number issued by the Department of Consumers Affairs to passenger carriers; or a United States Department of Transportation (US DOT) number issued by the Federal Motor Carrier Safety Administration (FMCSA) to truck and passenger carriers.

The number must be legible from 50 feet during normal daylight hours (approximately two inches high) and in a contrasting color to the background.

Example of proper display: CA 639106

If you have any questions regarding your assigned CA number or the requirement to display the number, please contact the CHP Southern Division at (323) 644-9557.



DOCUMENT 3

Project Scope of Work Template.

Project Scope of Work Template

This Project Scope of Work template has been developed to include the minimum tasks that all Applicants will be required to perform in **grey-shaded, bold text**. The method each Applicant uses to complete each task (milestone) can vary. SANDAG has provided sample milestones that could be used to successfully achieve each task, as shown below. Applicants must update these sample milestones to demonstrate how they will complete the task.

DEFINITIONS

Access Provider means an organization or entity that directly provides, or contracts with a separate organization or entity to provide, On-Demand Transportation to meet the needs of persons with disabilities, as defined in Public Utilities Code Section 5431.5(a).

Fulfilled Trip means a rider requests a trip, the trip is accepted by a provider, and the rider reaches their requested destination.

On-Demand means a transportation service that does not follow a fixed route or schedule, and the provider can fulfill trip requests within twelve hours.

On-Demand Response Time is the time between when a trip is requested and when the passenger is picked up. For on-demand trips, this cannot exceed twelve hours.

Pre-Scheduled Trip Response Time is the time between the passenger's scheduled pickup time and when the vehicle arrives. If the vehicle arrives before the passenger's scheduled pickup time, the pickup delay shall be "0".

Wheelchair-Accessible Vehicle (WAV) means a vehicle equipped with a ramp or lift capable of transporting non-folding motorized wheelchairs, mobility scooters, or other mobility devices, as defined in Public Utilities Code Section 5431.

Applicant Name	Butterfli Technologies Inc.
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Task #1	Task/Milestone Description	Deliverables
1.	Access Provider Selection and Preparedness	Access Providers ready and able to begin providing On-Demand services
A.	Identification of Initial Third-Party Access Providers GRANTEE identification of initial third-party Access Providers to provide On-Demand WAV services.	Within __1__ (#) weeks following the Notice to Proceed, __3__ (#) vendor(s) will begin providing AFA rides (list vendors): - SMS Transportation - Care 1 Transportation
B.	Contracting with Additional Third-Party Transportation Vendors GRANTEE contracting with additional transportation vendors. - GRANTEE will coordinate with other providers who could provide AFA service - GRANTEE will work with each potential	Within __1__ (#) weeks following the Notice to Proceed: GRANTEE will review demand and look to add additional vendors to contract for AFA services to plan for growth in demand. Within __2__ (#) weeks following the executed grant agreement or Notice to

	Access Provider vendor to complete the following before the vendor provides AFA service: - o Meeting the necessary CPUC charter-party carrier permit requirements (or meeting additional requirements if non-permitted) - o Finalize rates and establish contract parameters (e.g., service area and vehicles).	Proceed: • All additional transportation vendor agreement(s) will be finalized and executed. • Uber • Lyft
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Task #2	Task/Milestone Description	Deliverables
2.	Additional Support Services and Equipment Selection and Preparedness	Support services were established, and equipment was purchased to assist with On-Demand service.
A.	Contracting with Third-Party Paratransit Consultant GRANTEE will identify consultants specializing in paratransit operations, training and development, contracting strategies, and sustainability to help develop or amend the detailed Operations Plan. GRANTEE will establish rates and contract parameters with the selected paratransit consultant.	Within <u> 1 </u> (#) weeks following the Notice to Proceed: • A third-party paratransit consultant will be solicited. Within <u> 2 </u> (#) weeks following the Notice to Proceed: • A signed third-party agreement will be finalized and executed with the selected paratransit consultant.
B.	Contracting with Third-Party Vehicle Mechanic/Inspector or Hiring Vehicle Mechanic/Inspector GRANTEE will select a Mechanic/Inspector specializing in transit vehicles and driver requirements to develop a detailed, sustainable operations strategy and streamline service. GRANTEE will establish rates and contract parameters with the selected Mechanic/Inspector.	Within <u> 1 </u> (#) weeks following the Notice to Proceed: • A third-party Consultant/Mechanic or in-house Mechanic/Inspector will be solicited. Within <u> 2 </u> (#) weeks following the Notice to Proceed: • A signed third-party agreement will be finalized and executed with the selected Vehicle Mechanic/Inspector.
C.	Contracting with Third-Party Marketing Consultant or Hiring Marketing Staff (if applicable) GRANTEE will select a Marketing Consultant or Marketing staff to develop and implement a comprehensive outreach and marketing plan	Within <u> 1 </u> (#) weeks following the Notice to Proceed: • A Marketing Consultant will be solicited. Within <u> 2 </u> (#) weeks of following the Notice to Proceed: • The Marketing Consultant will be under contract with GRANTEE
D.	Identification of Service Analyst GRANTEE will interview candidates and select a qualified person to hire as one new GRANTEE staff position, a Service Analyst, who will track all AFA service and expense	Within <u> 1 </u> (#) weeks following the Notice to Proceed: • A new Service Analyst position for GRANTEE will be posted. Within <u> 2 </u> (#) weeks following the

	data for reporting and invoicing.	Notice to Proceed: GRANTEE will hire a Service Analyst.
E.	Contracting with Third-Party Backup Call Center GRANTEE will begin backup call center service or extend its backup call center service contract to provide service to requestors during Business Hours and Extended Hours, seven days a week. GRANTEE will respond to requests within Business Hours, and backup call center will respond to requests during Business Hours and Extended Hours.	Within <u> 1 </u> (#) weeks following the Notice to Proceed: The extended backup call center services agreement will be executed.
F.	Contracting with Third-Party Trip Management Software GRANTEE will develop or amend its existing reservation and trip management application as needed.	Within <u> 1 </u> (#) weeks following the Notice to Proceed: - The agreement for additional software enhancements to GRANTEE's existing software will be executed Within <u> 3 </u> (#) weeks of the executed agreement: - Software enhancements will be complete, and the updated system will be operational.
G.	Purchase of WAV Vehicles and Other Equipment GRANTEE will procure WAV vehicles and/or other equipment necessary to provide On-Demand WAV services such as cameras, software, and software integration.	Within <u> 4 </u> (#) weeks following the Notice to Proceed: GRANTEE will purchase one accessible hybrid-fueled WAV minivan Grantee will purchase any additional WAV vehicles needed, based on the needs assessment and draft Operations Plan.
H.	Conducting Vehicle Inspections - The GRANTEE's contracted mechanic/inspector will thoroughly inspect all vehicles before use in GRANTEE's WAV service. - GRANTEE or GRANTEE's vendor(s) will conduct general daily vehicle inspections - Once AFA service goes live, GRANTEE's Safety and Compliance Coordinator will perform vehicle inspections outlined in GRANTEE's Operations Plan.	Within <u> 3 </u> (#) weeks following the Notice to Proceed: GRANTEE will establish a final list of vehicles, and it will be updated as needed to reflect ongoing changes. The list will be provided to SANDAG upon request.

Task #3	Task/Milestone Description	Deliverables
3.	Development of Operations Plan	Completed Operations Plan
A.	Conducting Needs Assessment and Development of Draft Operations Plan GRANTEE will conduct a needs assessment on the current demand for WAV services, the fleet size and capability, the number of trained drivers, etc. GRANTEE will	Within <u> 2 </u> (#) months following the start of AFA service: - Completed needs assessment report Within <u> 3 </u> (#) weeks following a Notice to Proceed: - A draft operations plan will be developed

	accomplish this assessment by analyzing past service data and client feedback regarding accessible trip supply and demand. The project will be discussed during regional meetings such as Council on Access and Mobility (CAM) and the SANDAG Social Services Transportation Advisory Council (SSTAC). Regular meetings with each Access Provider will ensure GRANTEE understands each vendor's needs to expand WAV capacity. These discussions will assess driver training, insurance expenses, additional vehicles needed, vehicle sharing, etc. GRANTEE will develop a draft On-Demand WAV services Operations Plan to include: • Description of day-to-day operations • Performance measures to assess daily operations • Techniques to deploy to adapt to changing needs or inability to meet minimum performance measures • Techniques to deploy to improve Response Times and/or On-Demand WAV presence and availability	that details the service, program monitoring, performance measure, etc. • The operations plan will include findings from the needs assessment and outline the project's outreach and marketing strategy.
B.	Development of final Operations Plan	Within <u> 3 </u> (#) weeks following the executed grant agreement or Notice to Proceed: • GRANTEE's final Operations Plan will be completed.

Task #4	Task/Milestone Description	Deliverables
4.	Deployment of WAV Service	WAV trips
A.	Providing On-Demand WAV Service to the Public GRANTEE will begin providing On-Demand WAV service to the public. • On-Demand requests and reservations will be accepted by GRANTEE via telephone only until the reservation and trip management software application is available (Task 2.F.). • Service request/reservation hours will be 5:00 a.m. to 9:00 p.m., seven days per week, with a Response Time of _____ (#) hours after GRANTEE receives the request. • Requests received outside Business Hours and Extended hours will have a twelve hour Response Time • GRANTEE will stage _____ (#)	Within <u> 30 </u> (#) calendar days following the Notice to Proceed: GRANTEE will begin providing AFA WAV trips to members of the public. • First priority will be given to wheelchair users who need a WAV. • Second priority will be given to non-wheelchair users with a disability • Requests for service for non-wheelchair users without a disability will be Fulfilled if capacity allows and the first two priorities have already been met

	vehicles in different locations of the region to minimize Response Time and match demand.	
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Task #5	Task/Milestone Description	Deliverables
5.	Outreach efforts to publicize and promote available On-Demand WAV services to disability communities	Completed outreach efforts and well-informed disability communities
A.	Preliminary AFA Outreach and Marketing Preliminary AFA outreach will consist of meetings with other specialized transportation providers that may be interested in becoming an Access Provider, and presentations at the City of San Diego's Accessibility Advisory Board and the MTS Accessible Services Advisory Committee.	Within <u> 1 </u> (#) weeks of the Notice to Proceed: • Preliminary AFA outreach and marketing will begin • This will begin Day 1 after NTP
B.	Development and Deployment of Marketing Outreach with Third-Party Marketing Consultant GRANTEE and its marketing consultant will develop a marketing campaign and related materials to publicize and promote GRANTEE's WAV services to disability communities in low-income and minority areas and populations with limited English proficiency. GRANTEE's Operations Plan will detail the complete outreach and marketing strategy. Outreach activities will include fliers (direct market mailing and partner distribution), community presentations, stakeholder meetings, GRANTEE and partner agency website postings, partner referrals (e.g., 211 San Diego), program workshops, and social media. GRANTEE will also advertise and market the service through its call center and website referral program.	Within <u> 2 </u> (#) weeks of following the Notice to Proceed: • A complete outreach strategy will be implemented • The marketing consultant will be under contract with GRANTEE • All marketing materials will be finalized and utilized to advertise the service • GRANTEE and its marketing consultant will conduct the following activities under a 90-day marketing campaign to publicize and promote the GRANTEE's On-Demand WAV services: ○ Produce a photoshoot/video shoot that will be published on the GRANTEE's website and advertised using social media and paid media. ○ Develop a press release to announce the service to local media. ○ Once AFA service begins, conduct targeted outreach and follow-ups, and provide a high-level report of press release pickup, coverage, and media conversations. Outreach and marketing of AFA service will continue throughout the grant term.
C.	Adjustments to Outreach Activities The effectiveness of outreach activities will be monitored and adjusted by GRANTEE based on the response/demand of the target population. GRANTEE will ensure that: • Its On-Demand WAV services are effectively publicized and promoted to disability communities	GRANTEE will adjust its outreach strategy to ensure the services are publicized and promoted to disability communities throughout the San Diego region.

	• It markets and promotes public awareness of its On-Demand WAV services in both low-income and minority areas as well as populations with limited English proficiency • Its services are made available to individuals who do not have a smartphone or internet or need additional assistance in requesting the service	
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Task #6	Task/Milestone Description	Deliverables
6.	Monitoring program	Completed reports and monitoring checklist, tracking performance measures
A.	Adjustments to On-Demand WAV Service GRANTEE will review its Response Times and On-Demand WAV presence and availability and deploy strategies to ensure reasonableness and consistency with performance measures outlined in the Operations Plan and to ensure that Response Times are comparable to what a non-WAV on-demand requestor would receive from a Transportation Network Company (TNC). • Every month, GRANTEE's Service Analyst will monitor and review Response Times and On-Demand WAV presence and availability to ensure reasonableness and consistency with performance measures outlined in the Operations Plan • GRANTEE will deploy strategies that improve its Response Times or On-Demand WAV presence and availability as described in the Operations Plan	• Monthly report that describes Response Times and On-Demand WAV presence and availability of GRANTEE and its Access Providers. • Every month, GRANTEE will monitor Response Times exceeding one hour and review the information with the relevant Access Provider(s) to address delays due to driver actions or vehicle availability. • GRANTEE will deploy strategies to improve Response Times, including but not limited to: ○ Assisting Access Providers with identifying the most time-effective route to take ○ Contracting with new vendors to provide WAV service ○ Seeking new technologies used by transit operators or other specialized transportation providers to improve service
B.	Compliance Monitoring of Vehicles GRANTEE's Safety & Compliance Coordinator will review the preventative and routine vehicle maintenance performed by Access Providers to ensure consistency with industry standards, inspection requirements mandated by the CPUC, and other procedures outlined in the Operations Plan. GRANTEE will maintain the weekly vehicle observations, initial vehicle inspections, and annual inspections as described in the Operations Plan.	GRANTEE will provide a quarterly report outlining the findings of GRANTEE's review of preventative and routine vehicle maintenance. The report will also include any issues reported to GRANTEE by an Access Provider and any complaints received by GRANTEE or an Access Provider regarding AFA service. GRANTEE will deploy strategies to improve routine vehicle maintenance and inspections as described in the Operations Plan. These strategies will include: • Incorporating feedback from the certified mechanic during annual vehicle inspections • Providing training resources to Access

		Providers, including California Association for Coordinated Transportation (CalACT) and Community Transportation Association of America (CTAA) maintenance workshops.
C.	Compliance Monitoring of Drivers and Other CPUC Safety Requirements GRANTEE will review Access Provider files for all drivers who provide AFA service to ensure compliance with the safety requirements mandated by the CPUC: • Background checks • Driver training • Controlled substance and alcohol testing GRANTEE will deploy strategies to ensure compliance with the safety requirements mandated by the CPUC, including random requests for Access Providers to provide documentation for their drivers.	GRANTEE will deploy strategies to ensure its Access Providers comply with the safety requirements mandated by the CPUC, including maintaining records for insurance requirements, vehicle inspections, controlled substance and alcohol testing, driver training, and ongoing weekly vehicle observations. GRANTEE will require its Access Providers to retrain and certify any driver that fails to meet the safety requirements mandated by the CPUC before the driver is permitted to provide AFA service. GRANTEE will provide a quarterly report that includes the data compiled during the previous three-month period, including whether any complaints were filed against an Access Provider or its drivers.
D.	Quarterly Reports GRANTEE will track all required service data and meet all necessary quarterly reporting deadlines.	Every quarter and as described in the AGREEMENT, GRANTEE will provide to SANDAG: • CPUC Quarterly Data Report • SANDAG Quarterly Status Report
E.	Project Budget and Schedule Monitoring	GRANTEE will monitor its monthly spending to ensure alignment with budgeted expenses. The project schedule will be monitored to ensure tasks are being completed on time and the project is completed by the grant termination date.