



**Metro Transit  
Rideshare Operations**

# King County Metro Commuter Van Program

*Program Participant Manual*

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## WELCOME TO KING COUNTY METRO COMMUTER VAN PROGRAM

Welcome and thank you for supporting your group and our program by becoming a driver, bookkeeper or rider. Although every commuter van program participant is important, drivers and bookkeepers must meet additional responsibilities as part of their group. This manual was written for you and will provide you with the information needed to meet your new commuter van program responsibilities. Please keep a copy of this reference manual in your group's commuter van and share its content and guidelines with all your Commuter Van riders. For more information, contact Rideshare Operations at 206-625-4500 or toll free at 1-800-427-8249.

## SECTION I: METRO COMMUTER VANS—30 YEARS & GROWING

### From Oil Crisis to Nation's Largest Publicly Owned Commuter Van Program

Sharing a ride to work became a necessary alternative during the 1970's oil crisis, paving the way for King County Metro Commuter Van Program's establishment in 1979. Originally consisting of just 21 vanpools, Metro's Rideshare Operations grew steadily to today's successful and pioneering program of more than 1,600 vehicles. King County Metro's Commuter Van Program is the largest, longest running public commuter program of its kind in the nation, boasting more than 3.5 million rides each year.

Giving commuters the choice to share the ride in a commuter van, King County Metro serves groups as few as five and as many as 20 commuters in each van. With monthly fares covering gas, maintenance, insurance and a guaranteed ride home, our VanPool, VanShare and newest metropool vehicles, offer cost-savings, flexibility and convenience. Factor in the advantage of being able to use high-occupancy-vehicle lanes and ramps, designated vanpool parking and knowing that you are part of making King County a greener place to live, makes King County's commuter van program a winning combination.

Since its inception, the program has provided significant benefits to participants and the local Puget Sound environment. Each year, the program saves 3.6 million gallons of gas, 70 million miles of wear and tear on personal vehicles and five million pounds of pollution from entering the atmosphere. The program removes 6,000 cars from the road every day and the average commuter van participant saves more than \$6,000 per year over driving alone.



Groups pay monthly fares and get everything else needed for successful ridesharing: orientation, rider support services, maintenance, insurance, fuel, tires and a guaranteed ride home. The group must have a minimum of five riders, two who volunteer to be drivers and one who volunteers to be a bookkeeper. A driver keeps the van at their house overnight and the group decides where riders will be picked up and what route they will take on their commute.



**First Last Mile Solution**—VanShare bridges the gap between commuters and public transportation. Groups of five or more commuters use a King County provided van to make that first or last mile connection between home or work and with transit service such as a train, ferry or bus.



Metro Rideshare Operations furthers innovative public transportation with 100% electric, zero-emission vehicles known as metropools. Commuters can join an interest list for one of the two-dozen, five-passenger Nissan LEAFs in our fleet. King County worked with local employers and the state to install more than 50 public-access electric charging stations near large employers and at transportation hubs such as Park & Rides and ferry terminals to encourage and promote the use of electric vehicles.

## SECTION II: SUPPORT STAFF

We understand you have a choice in how you commute and we appreciate you choosing King County Metro Commuter Van Program. We have many resources in place to help make sure you have the information you need to succeed.

### Rideshare Operations—We are Here for YOU!

Rideshare Operations is the workgroup that manages and operates the Commuter Van Program. Our office hours are Monday through Friday from 8 am to 5 pm and we can be reached at 206-625-4500. Please do not hesitate to call with questions or comments. We are here to help!

### Rideshare Services Representatives (RSRs)

As a driver or bookkeeper, you will likely work closely with your Rideshare Services Representative - also known as an RSR. These subject matter experts provide personalized support in the following areas:

- Formations**—Assisting commuters with starting new groups
- Maintenance**—Scheduling service and resolving vehicle issues
- Accounting**—Supporting bookkeepers with monthly reporting
- Group**—Aiding drivers and groups with all other support

Every group is assigned one RSR for maintenance and one for accounting. The group and formations RSRs are not assigned to specific groups but are available to help any customer with questions in their respective areas.

Every group is assigned a Group Identification Number (GIN) – this is the group’s account number. Likewise, every vehicle is assigned a High Occupancy Vehicle (HOV) number. A group’s GIN never changes, but because groups will be in possession of a number of vehicles through their commuter van group’s time together, the HOV will change with each new or service loaner vehicle. . . Depending on which RSR you contact, you will be asked for your GIN and/or HOV. It is a good idea to memorize both of these numbers.

If you ever need to leave a voice mail with or send an e-mail to an RSR, please make sure you include your name, GIN and HOV number and a brief description of your contact reason. With more than 1,600 groups on the road, RSRs will need that information to help you as quickly as possible.

For a list of the RSRs and their contact information please visit our online resource pages. If you ever need to talk with an RSR, please call 206-625-4500—the same number posted on the side of all of our vans—and we will transfer you to the appropriate person.

## SECTION III: PARTICIPANTS AND GROUPS

Forty years of experience have taught us that when every participant has a vested interest in his or her group the group will be more successful. This section discusses what it takes for a group to be successful including an overview on needed application forms, participant roles and responsibilities, group dynamics, operating guidelines, how to handle complaints and more.

***Commuter van groups are most successful when all members work together and stay together as a group.***

### Program Application (PA) & Agreement

The Metro Commuter Van Program Application & Agreement with Terms & Conditions, called a PA, must be filled out and signed by all participants before they may ride in a commuter van. The PA details the specific responsibilities and terms and conditions that every participant agrees to be bound by when participating in the program.

Completed Program Applications may be faxed to Rideshare Operations at 206-684-2166, e-mailed to [vanpool.information@kingcounty.gov](mailto:vanpool.information@kingcounty.gov) or mailed in with the monthly reports submitted by the bookkeeper. Once the PA is in the hands of the bookkeeper, that person can begin riding in the van. Drivers and bookkeepers are encouraged to let riders know that they have responsibilities under this agreement that are vital to the smooth operation of the commuter van. Groups are also encouraged to keep a copy of the PA in the vehicle so that the responsibilities are available as a reference. This form must also be filled out and signed by the parent or legal guardian of any children riding or participating in your commuter van. Our program application is also available in our online resources.

### Riders

Riders can help their commuter van operate smoothly by cooperating with the driver and assisting in many situations. Riders should always be expected to:

- Pay their fares promptly.
- Arrive at the pick-up points on time.
- Help keep the van clean.
- Notify the driver about planned absences.
- Provide at least 15-days-notice before leaving the group.
- Assist the driver by observing the driver's blind spots and communicating location of other vehicles or obstacles.
- Be knowledgeable about their group's inclement weather and emergency plan.
- Offer to assist the driver with filling appropriate group roles—if you are outgoing, offer to support the driver with recruiting, if you are a natural facilitator, offer to run the group's meetings.

## Drivers

Drivers are the glue that keeps a commuter van running smooth and sticking together. In addition to driving, drivers also have a handful of other roles they frequently fill as part of the group. They are often looked to as the groups' leader or manager, recruiting coordinator, group facilitator and lead communicator. In many groups, backup drivers, bookkeepers and riders fill these roles as well.

### Driver Specific Responsibilities

Aside from the leadership roles, there are specific program responsibilities for all drivers as well. Some of these roles are specific just to the primary driver where others apply to primary and backup drivers.



**Note:** Only drivers who have been approved by Rideshare Operations are authorized to drive a Metro commuter van or metropool vehicle. Only in emergency situations, and when authorized by Rideshare Operations, may someone other than an approved driver operate a commuter van.

#### ALL DRIVERS Must:

- Maintain a valid Washington State driver's license.
- Notify Rideshare Operations when they are no longer in accordance with the established [driver selection criteria](#).
- Notify Rideshare Operations if they receive a moving violation or any other type of traffic related citation, even in their own vehicle. This includes accidents.
- Report to Rideshare Operations within two business days any incident involving vehicle damage, property damage, injury, fatality, or the potential for a medical or liability claim.
- Communicate actual month-end odometer readings to the bookkeeper and provide the vehicle HOV number and odometer readings for all loaner vans used.
- Enter accurate odometer readings when fueling the van.
- Conduct daily vehicle inspections.
- Report **any** van damage (inside or out) to Rideshare Operations **within two business days**.
- Be specifically authorized for personal use including carrying approved personal automobile insurance.

**Drivers MUST NOT use the vehicle for hire or to transport any groups or individuals without express authorization from Rideshare Operations. The vehicle MUST NOT be used for TNC-use and should not be used to transport sports teams or school, youth, scouting, church or community groups. Drivers MUST NOT use the vehicle to transport alcohol or narcotics in violation of the Revised Code of Washington (RCW) as it pertains to the operation of motor vehicles/Rideshare vehicles.**

#### Primary Drivers Must

- Drive the van each scheduled day to and from work picking up and dropping off riders in accordance with the mutually established route and schedule.
- Coordinate all van fueling, maintenance, service and cleaning—driver must know which approved backup drivers are using the van and when.
- Obtain prior approval from Rideshare Operations for expenditures other than gas.
- **Ensure the group has a sufficient number of backup drivers (one at a minimum) to ensure continued operation of the group in their absence.**
- Allow backup driver(s) reasonable access to the van for refueling, van maintenance or for running an occasional errand (If eligible to use excess miles).
- Pay for miscellaneous operating expenses and submit receipts for authorized reimbursements such as fuel, wipers and deicer.
- Keep daily and monthly records, as required.

- Coordinate the provision of alternate transportation when the van is not available such as during maintenance or severe weather.

### **Backup Drivers Must**

- Be available to drive when the driver is unable to do so.
- Assume all responsibilities of the primary driver when acting in that capacity.

### **Additional Key Driver Roles**

There are four additional key roles you may fill as a driver: group leader or manager, recruiting coordinator, group facilitator and lead communicator—it is important to remember that you are also an equal member of the group. Make sure that all members contribute equally where necessary and that you are not responsible for doing everything for the group.

#### **Leader/Manager**

As the leader/manager of the group, you are expected to:

- Have a broad understanding of Rideshare Operations' program policies.
- Facilitate and finalize decisions.
- Provide information and direction for group decisions.
- Coordinate the activities of the group.

Remember, while there are times when you have to take charge and make sure decisions are made and implemented, your group will operate more smoothly when all members feel they have a personal investment in the group's success.

#### **Recruiting Coordinator**

As the group's recruiting coordinator, you are expected to:

- Assure your group has as many riders and drivers as necessary at all times. The more drivers the better!
- Look first to members of your group to potentially fill new backup driver or bookkeeper roles and also to get them involved in recruiting new people. It is to everyone's benefit to have the right amount of riders, drivers and bookkeepers, and can also save the entire group money. It can sometimes be a difficult process to find a new rider, let alone a new rider who is also willing and able to be a driver or bookkeeper—Remember, you can always call 206-625-4500 for recruiting tips.

#### **Facilitator**

As a facilitator, you will need to:

- Help the group make decisions and settle differences as they arise.
- Conduct meetings; encourage all participants to get involved and contribute ideas.
- Respond to individual participant needs.
- Deal with participant expectations and ask for feedback.
- Foster a congenial group atmosphere to maintain open and relaxed communication.
- Remember, as a facilitator you will need to focus on the issues and not the personalities. Contact a group RSR for advice or a fresh perspective when necessary.

#### **Communicator**

As a communicator, you will need to:

- Relay information to Rideshare Operations from the group and to the group from Rideshare Operations.
- Share the results of group meetings with those not able to attend.
- Ensure all participants' voices are heard.
- Talk with individual members of the group as appropriate.



## **Bookkeepers**

### **Bookkeeper Responsibilities**

The bookkeeper, like the driver, is considered an agent of King County Metro and is the only participant eligible to handle the collection of participant fares and complete the group's monthly reports. Bookkeeper responsibilities include the following:

- Collect program applications (PAs) before someone new rides in the van, including any riders' children.
- Tell each participant how much their monthly fare is each month.
- Know the value of passes and other fare media, such as ORCA passes or vouchers, used by participants to pay fares.
- Collect fares and copies of passes from participants by the first working day of the month.
- Obtain required vehicle information from the driver, such as vehicle odometer readings and maintenance shuttle miles.
- Pay for miscellaneous operating expenses and submit receipts for authorized reimbursements.
- Complete the Monthly and Ridership Report forms and accurately report mileage, revenue, expenditures, and ridership in the appropriate sections.
- Prepare the Monthly Report Packet and submit it to Rideshare Operations received no later than the 10th of the current month. The packet should include an original and one copy of each page of the Monthly and Ridership Report forms; legible copies of all passes, receipts, vouchers; and one check payable to King County Metro for any balance owed. Bookkeepers are encouraged to use pre-addressed, postage-paid envelopes provided by Rideshare Operations.
- Consider setting up a non-interest-bearing, free checking account separate from a personal checking account for depositing participant payments and for writing checks to King County Metro. Bank charges and check printing are reimbursed when accompanied with a bank statement copy.
- Distribute information from Rideshare Operations to group participants, as necessary.
- Know the financial policies of the commuter van program, as appropriate.

### **Consequences of Improper Bookkeeping**

While rare, please be aware of the following consequences of improper bookkeeping.

- The bookkeeper may be held financially responsible for any payment shortages.
- The bookkeeper may need to collect additional money from the participants.
- The group may be assessed late fees for reports not submitted on time.
- Bookkeepers may be placed on probation or required to find a replacement bookkeeper.

Also, the group may be asked to return their van to King County Metro for non-payment of fares, improper reporting or lack of an approved bookkeeper.

## Common Responsibilities

The following matrix combines most of the common responsibilities for riders, drivers and bookkeepers.

Group Responsibilities	Driver	Backup Driver	Book-keeper**	Rider
Driving the van safely	X	X*		
Inspecting and maintaining the van	X	X*		may assist
Reporting any van damage within 2-working-days to Rideshare Operations	X	X	may assist with	may assist with
Handling emergencies and breakdowns	X	X*	assist with	assist with
Working with the maintenance, accounting and group RSRs	X	X*	X	
Communicating with the group; sharing and distributing information from Rideshare Operations, as requested	X	X*	X	
Paying all required fees and being on time at pickup points	X	X	X	X
Recruiting riders with <b>RideshareOnline.com</b> . For assistance on this, call 206-625-4500.	X	X	X	X
Bookkeeping and/or reporting	X*	X*	X	
Holding group meetings	X	X*		
Helping to keep the van clean	X	X	X	X
Tracking odometer readings for the bookkeeper	X	X		
Collecting fares and eligible passes or vouchers.			X	
Preparing and submitting monthly reports			X	
Collecting and submitting receipts for reimbursement	X	X	X	
Knowing King County Metro Rideshare Operations financial policies			X	
Collecting and submitting completed Participant Agreements	X		X	
Notifying the driver of changes in schedule, if out sick, vacations, etc.	X	X	X	X
Notifying the driver and bookkeeper at least 15 days before leaving the group	X	X	X	X

\* When assuming the driving role. \*\* Many Primary and Backup Drivers are also approved Bookkeepers.

## Maintaining Your Group

It is as important to foster group cohesiveness as it is to maintain the vehicle and is vital to group longevity. The success or failure of a commuter group depends on:

- Healthy group dynamics
- Open communication
- Good operating rules
- Response to complaints
- Retaining/recruiting drivers, bookkeepers and riders

## Group Dynamics

Promoting proactive communication, encouraging all members to treat each other with respect, anticipating potential problems, and establishing a process for resolving conflict are all important for healthy group dynamics.

## Communication

Good communication between group members is essential to a successful group. From group meetings and contact lists to updated phone trees and setting up adverse weather plans, groups need to communicate early and often to get the best collaborative atmosphere for their van group.

### Group Meetings

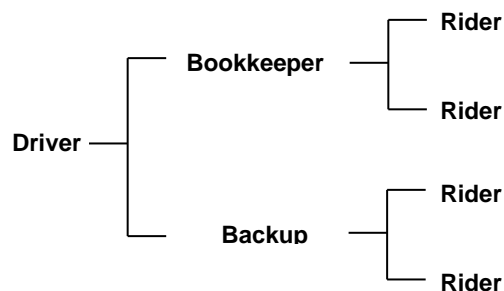
Groups are strongly encouraged to hold group meetings on a regular basis. Among other things, these meetings can be held to share group news, provide program updates, and/or discuss topics of concern. Some groups keep a suggestion box in the van so participants can add comments or suggestions during the month that can later be discussed during the meetings. Although meetings or discussions can be done during the commute, many long running groups get together outside the commute and make it a social get-together.

### Phone Tree & Updated Contact Lists

Whether it is for emergency purposes or regular updates, communication between group members is critical for a successful commuter van group. To help facilitate rapid communication, every group should have an updated contact list and phone tree that lists home and mobile phone numbers—group members should save commuter van contact names and numbers in their mobile phone for quick access. Some examples of when rapid group communication is necessary are:

- Putting an adverse weather commute plan into action
- Notifying group members about an emergency or breakdown
- Passing along a general change in commute plans
- Notifying the primary driver about a last-minute rider absence

The group should ask one person (possibly a back-up driver) to be responsible for keeping the contact list/phone tree up-to-date, keeping an updated copy in the van and encouraging every participant in the group to have a copy of the phone tree at home and commuter van participants' names and numbers saved onto their mobile devices. The following example would work for a group with seven participants and can be expanded as necessary.



## Operating Rules

Groups should establish their own operating rules and discuss potential problems in advance, as well as other concerns or issues the group feels necessary. After discussion, the group should develop possible solutions to concerns by majority vote and incorporate them into group operating guidelines. However, please note that no group operating rule may contradict any Rideshare Operations policy.

Some examples of potential problems and discussion topics are:

- **Route**—Where will the van stop to pick up riders? Will the group add additional stops to gain riders? Discuss the route with the group. Consider time constraints and convenience when making changes.
- **Tardiness**—What happens if a participant is late? How long will the group wait? Using the van clock for reference, consider a 5 - 10 minute limit before leaving without the rider. Require notification calls from riders who will be late. Discuss possible repercussions for repeated tardiness.

- **Seating**—*Will seating be first come, first served? First out sits closest to the door? Other?* Discuss using rotating seating arrangements or assigning seats according to drop-off order.
- **Noise**—*Do loud noises bother the driver (conversations, radio, video games, cell phones, etc.)?* Consider having a 'quiet' van, rotating radio stations or having the driver listen to their station of choice but at a low level where others can use headphones.
- **Fragrances**—*Is anyone in the group sensitive or allergic to scents?* Consider a group rule to postpone applying cologne, perfume or scented products until after the commute.

Here are some final considerations:

- Examine the operating rules from time to time to determine if they are still acceptable.
- Write down the rules and keep a copy in the van so that they can be referred to.
- Make sure new riders joining the group are aware of the operating rules.
- Be prepared to compromise if there is a conflict in the group over specific rules. If compromise can't be reached, do not hesitate to call 206-625-4500 to be transferred to the group RSR for advice or assistance

## Complaints

Despite the best efforts of the driver and our office, there may be times when people are dissatisfied and voice complaints. The complaint may be internal—about a particular rider, operational rule, or a driver's driving; or it may be from the general public—about an unsafe practice that was witnessed.

Although complaints are generally viewed as negative, they can be an excellent way to offer new ideas, bring about improvements in operating your van, or to identify an area that needs assistance. Complaints may be directed to our office or to the driver. We have listed some guidelines for when a complaint has been voiced to you, and additional information on Rideshare Operations' complaint handling procedures:

- Take any complaint seriously. Try to empathize with the individual voicing the complaint. Although it may seem trivial to you, it could possibly become a bigger issue if not taken seriously and handled quickly.
- Find out what the specific problem is. Talk with the individuals involved, ask questions, give feedback, and when you think you understand, restate the problem to those involved.
- Share information and/or alternatives with the individual or group. Try to suggest potential solutions or changes that can be made.
- Determine whether it is a problem that can be handled at a group meeting by majority vote or whether a one-on-one conversation is needed. For instance, if a complaint is voiced about the potent scent of a rider's cologne, scents could be discussed at a group meeting without naming a specific individual.
- Discuss solutions and decide upon them by majority vote (e.g. no perfumes or cologne allowed in the morning commute; riders should bring their favorite scent with them to apply at work).
- Agree on a solution. Make sure that everyone involved is notified of the solution. If necessary, add the solution to the group operating guidelines. Do not assume that everyone knows!
- Set a time frame for improvement and check back to see if the situation is resolved.

Contact Rideshare Operations for intervention if a problem cannot be handled within the group or if you need assistance at any point. It is particularly important to check with our office before making policy statements.

### **Complaints Received By Rideshare Operations**

All complaints received by Rideshare Operations are treated seriously and investigated thoroughly. In general, there are four common types of complaints that we receive.

- **Safety**—The most common complaint is aggressive driving such as tailgating and cutting-off others when merging or switching lanes. Remember, the highly visible logo and phone number invites public comment. Riders who feel unsafe may call also. Action will be taken
- **Group**—Unresolved group conflict can be reported by any member of the group. Remember to create and use operating guidelines and hold group meetings to help avoid conflict.
- **Maintenance**—As a driver, you are encouraged to stay in contact with Rideshare Operations regarding your experiences with maintenance garages. Any criticism or commendation you provide helps in garage evaluations.
- **Parking**—Always park your van in its authorized location. Park legally and courteously. The driver must park the van off the street at the driver's residence or in a Rideshare Operations approved location.
- **Policy**—Complaints about program policies, procedures, and/or staff members should be directed to our office. If you are dissatisfied with the staff member working with you, a Supervisor will be available to assist you.

### **Complaint Handling Procedures**

- A staff member will take a complaint report filed by a group member or the general public. Although the person who files will be asked to supply their name, address, and phone number - the information will remain confidential and not be released. Every attempt is made to handle complaints quickly and efficiently. Safety-related complaints will be given priority and resolved as soon as possible.
- A staff member will investigate the complaint. During the investigation, the person against whom the complaint was made will be contacted for an explanation of the specific circumstance.
- In cases of safety-related complaints against drivers, they may be asked to step down temporarily while the investigation is being conducted. Another authorized driver will be asked to operate the van during this period.
- If necessary, the investigator will conduct a rider poll of each member of the group. Each rider will be asked the same questions and their responses will be documented. The driver will be advised of the rider poll. However, any information provided by the riders will remain confidential.
- Rideshare Operations' staff will discuss and decide alternatives.
- If necessary, follow up action will be taken at this time and a verbal or written warning may be issued. Probation or a suspension of privileges may be assigned or, in extreme cases, a person may be removed from the group.
- Complaints against drivers will be documented and will remain in their program file for a year. After more than one serious complaint, Metro may withdraw driver approval.

## Maintaining Ridership and Positions

Commuter groups lose riders and positions (drivers & bookkeepers) for a variety of reasons. It is program policy that every commuter van must have at least five participants. Of those five, there must be at least two drivers and one bookkeeper (a driver can also be a bookkeeper). Therefore, recruiting new riders, drivers and bookkeepers is an important aspect of being involved in a commuter van. Make sure you notify Rideshare Operations if you are in need of riders, drivers or bookkeepers by calling your group RSR or 206-625-4500. The sooner we know you need help, the sooner we can assist you.

### Driver & Bookkeeper Selection Criteria

Asking existing members if they would be willing to be a driver or bookkeeper is the easiest and most convenient way to fill these positions. Encourage those group members who are interested in becoming a driver or bookkeeper to submit an updated [program application \(PA\)](#) with the appropriate driver or bookkeeper section filled out. They must meet [specific criteria](#) to fill either of those positions.

### Rider Recruiting

The easiest and best way to recruit riders is for everyone to talk about their commuter van with people they know. The vast majority of commuter van participants find their particular group by talking to someone in that group. Have a contest for whoever brings in new riders. Allow winners to do something special like choose their seat in the van, choose what radio station to listen to, or enjoy free coffee and doughnuts.

You can find additional [recruiting resources](#), along with updated fares and helpful tips by visiting King County Metro's rideshare resources online at [kingcounty.gov/metrovans](http://kingcounty.gov/metrovans)

### Rider Waiting List

It is the drivers' responsibility to maintain a waiting list of potential riders for their group. When names are received from Metro, or through other means, it is necessary to record the name, phone number, and most importantly, the date that the person who contacted you. If there are specific notations regarding individual preference for riding (e.g. 'wants to ride part-time in April') be sure to record them so there is less confusion later on. When you have a vacancy in your commuter van, the first person on your list can be contacted. You should operate on this first-come/first-served basis while ensuring that there is compatibility with your existing route and travel times.

Since King County commuter vans (vanpool, vanshare, metropool, et al) are public programs and you are acting as one of our agents, it is important to be sensitive to the potential for discrimination. Although it is ideal to have group members who are compatible, it must not be a factor for selecting new riders. Please take special care not to make a decision that could be construed as showing favoritism or prejudice in your selection of new riders.

### Vehicle Trades

When there is a change in your groups' ridership for a significant period of time, the potential for trading to a larger or smaller sized van should be explored. As there may be fare or comfort considerations, the decision to trade vehicles should be made by majority vote within the group.

Notify your group RSR when you are interested in trading to a different van. Your RSR will talk to you about the fare changes and any other information that you need to know. If a vehicle is available, arrangements will be made at a mutually agreeable time to trade the vehicles. If there are no vehicles of the appropriate size available, your name will be placed on a waiting list. Although we are happy to see commuter groups increase ridership and request a larger vehicle, we ask that your group make at least a 6-month commitment to stay with the new vehicle size.

## SECTION IV: VEHICLES

The vehicles section is organized into the following four areas:

- Safe operating habits
- Inspections and maintenance
- Emergency procedures
- Additional information

In addition to understanding and complying with the following program features, to remain an approved driver, you must maintain a satisfactory driving record and comply with the terms and conditions in your application. Understanding and meeting these responsibilities will control program costs and help ensure the safety, comfort, and satisfaction of your riders.

### Operating

The King County Commuter Van Program has an impressive safety record because of the quality of its drivers. Driving your commuter van safely is an important responsibility. Years of program experience have helped us develop the safety guidelines on the following pages. Adhering to them will help you adjust to safely driving a commuter van.

The majority of commuter van accidents happen during the morning and evening commutes. The three top accidents involve hitting fixed objects, backing into other cars, and clipping parked cars. Slow down and give yourself extra time to respond to the changing conditions of peak hour travel and your commute will be safer and more enjoyable. Always remember - It is your responsibility to operate your van as safely as possible for the welfare of you and your group.

**The vehicle MUST NOT be used to transport any alcohol or narcotics in violation of the Revised Code of Washington (RCW) as it pertains to the operation of motor vehicles.**

### Be Alert, In Control and Anticipate Changes

Knowing what is going on around you and making sure other drivers are aware of you is an important part of defensive driving. Scan all mirrors on a regular basis to see what is happening to the sides and rear of your van. This will help you anticipate and avoid dangerous situations.

- If buildings, landscaping, or large vehicles restrict visibility, slow down until you have a clear view.
- If you ever feel distracted, upset, ill or tired, ask your backup driver to take over.
- Avoid sharp turns, excessive speed and abrupt maneuvers. Remember, vans are longer and require more space to turn.
- Cover the brake with your foot in stop-and-go traffic to reduce reaction time.
- Do not reach down to pick up items from the floor while driving.
- Do not eat while driving.
- Do not use your cell phone when driving.

### Use Spotters

**A spotter is a rider who is sitting in the front passenger seat or one of the rear corners.** They can help you see what is in your blind spots. Riders in these positions should not read or sleep if possible.

- Use spotters to check your clearances when backing and parking in confined areas.
- Ask spotters to check for vehicles in your blind spots when merging and changing lanes.

- Be specific. Ask spotters to check if you are clear to complete the maneuver. Wait for a response before maneuvering.

### Cushion of Space

Establish and maintain a cushion of space around your van so you will have room to take evasive action if needed. Be alert to changing traffic conditions by monitoring traffic around you. Scan your mirrors continuously for traffic, other hazards, and to be aware of what is happening around you.

- Scan the road ahead at least 12-15 seconds or ¼ mile.
- Know what is alongside and behind you. Be aware of blind spots and obstacles around your van.
- Do not drive in another vehicle's blind spot. Adjust your speed if you cannot see the other vehicle's rearview mirror.
- Look for signs that vehicles on the side of the road or in parking lots are trying to enter traffic. Be prepared to stop, slow down, or yield the right of way.
- Watch for pedestrians crossing against the traffic lights and check for cyclists before making right-hand turns.
- Be on the watch for objects or debris in the road. Brake lights and quick lane changes in traffic ahead may indicate a problem in the flow of traffic.

### Safe Lane Changes

When making any lane change, your intent should always be to alert other drivers around you to your actions and to be sure that you are safely clear to perform the lane change before doing so.

- Use a spotter when changing lanes and merging and signal your intention well in advance of a lane change.
- Reduce or increase your speed to create space around you. Monitor traffic flow in the lane you are moving towards.
- Double check oncoming traffic prior to executing a left- hand turn. **Do not** rely on other motorists who wave you through.
- When in doubt, yield the right of way. Always remember the merging vehicle must yield to the flow of traffic.

#### **Left-Hand turn collisions are expensive and dangerous!**

- Left-hand turn accidents average \$50,000.
- A motorist involved in the accident has 1-in-3 chance for serious injury or death.

### Following and Stopping Distance

Vans take longer to accelerate into traffic and to stop when needed. When your foot is not needed on the gas pedal, use it to cover the brake pedal to decrease your reaction time needed to stop.

- Be prepared to stop when approaching intersections where the light has been green for a while.
- Use a three to four second following distance and **do not** tailgate the vehicle in front of you. Increase this distance during adverse weather or on rough roads.
- If the vehicle behind is tailgating you, increase the room in front of your van so you can brake smoothly and slowly. Have an escape route planned. At unmarked intersections be certain any other vehicles have stopped before proceeding, regardless of who arrived at the intersection first. If there is no stop sign, the vehicle on the right has the right of way.
- Leave a safety margin between you and the vehicle in front of you when stopping. Always wait two seconds before starting from a stop when following another vehicle.



### **Following too closely or driving too fast can cause rear-end collisions**

- Leave ample distance between vehicles; Do not drive too fast for conditions.
- Abrupt stops are the number one reason for being rear-ended.

### **Maneuvering**

The size of your van requires more caution when moving in traffic and parking areas. Commuter vans do not respond well to abrupt turns and require additional braking distance. Your van has larger “blind spots,” making it more difficult to back up.

- When cornering, reduce your speed and make a wider turn by starting the turn further forward in the intersection.
- Accurately judge clearances. Use mirrors and spotters to help safely maneuver the van. When necessary, significantly reduce speed and proceed with caution.
- Exit freeways at below the posted speed limit which are set for cars.
- Refrain from backing unless absolutely necessary. If you must back up, be aware of all obstacles behind your van. Use extra caution if you have a bike rack on your van.
- Do not drive your van until you and your passengers have your seatbelts buckled on.
- If your tires leave the road, gradually slow to a complete stop. Re-enter the roadway when safe to do so.

### **Most rollovers occur at high speeds as a result of a sudden steering maneuver.**

- More than 90% occur after a driver runs off the road.
- Eighty percent of people killed in rollovers were not wearing seatbelts.

### **Van Clearances**

Commuter vans handle differently than other vehicles such as passenger cars because they are wider, taller, longer, and heavier. The size of your van requires you to be more cautious when moving in traffic and parking areas. They also require more space when cornering or moving in tight spaces. Collisions with fixed objects accounts for the single highest cause of body damage to vans.

- Full size vans (11-15 passengers) require 7 ft 3 inches of clearances and “mini” vans require 6 ft 4 inches. If roadway or garage height clearances do not meet those requirements, **Do Not Enter**. Avoid entrances with no posted height clearances.
- Keep adequate height and width clearances between the van and other vehicles and fixed objects such as light posts, parked vehicles or low retaining walls.
- Use extreme caution when parking in garages. Watch clearances between the van and support columns and walls. Use spotters for assistance.
- Always choose the best parking space to accommodate the size of your van.

### **Parking Lot Collisions are the Most Common Type**

- Slow down and scan your surrounding constantly
- Use your passengers as spotters to look behind the van and in blind spots on the sides.

### **Loading and Unloading the Van**

Use extreme caution when loading and unloading riders. Do not stop in a lane of travel on the roadway or in parking lots.

- Move out of traffic, stop on a level surface (whenever possible) and apply the parking brake.
- To help prevent locking yourself out, never leave the driver’s seat with the engine running.
- Passengers should load front seats first and fill-in to the rear for balanced loading.

## Park and Secure the Van

Remember these important steps when parking your van.

- Close all windows and always lock your van.
- Turn off electrical accessories, especially reading lights.
- Remove all valuables.

## Using The Parking Brake—First On/Last Off

To help prevent costly and time consuming transmission repairs, remember to use your parking brake *First on/Last off*.

- When parking, engage the parking brake and then put the transmission in park - *First on*.
- Before driving, put the transmission in gear and then disengage the parking brake - *Last off*.
- Always park legally, courteously and carefully; park within the lines and only park in designated commuter van spots.

## Commuter Van=Limited Use

**There are several scenarios where commuter vans MUST NOT be used.**

- The vehicle **MUST NOT** leave the State and must stay within 200 miles of Seattle.
- The vehicle **MUST NOT** be used for-hire or to transport any groups or individuals without express authorization from Rideshare Operations. Vehicles **MUST NOT** be used for TNC-use or to transport sports teams, school, youth, scouting, senior or any community groups.
- **The vehicle MUST NOT be used for business purposes**—you must not use the van during work hours to travel or transport co-workers to meetings or other functions as this constitutes business use and is prohibited without a business-use agreement.
- The seats **MUST NOT** be removed.
- The vehicle **MUST NOT** be used to tow or haul garbage, debris, excessive loads, heavy loads/items, trailers, recreational vehicles, lumber, mattresses, animals or anything other than the allowable passenger limit.
- The vehicle **MUST NOT** be used for off-road travel, ski trips or going over mountain passes during snow.
- The van **MUST REMAIN** available and clean for its commuting purpose.
- The van **MUST NOT** be driven over bridges/roads that post a maximum capacity of 4 tons or less.
- Accessories **MUST NOT** be added or removed – this includes appearance items or additional equipment.
- The vehicle **MUST NOT** be used to transport any alcohol or narcotics in violation of the Revised Code of Washington (RCW) as it pertains to the operation of motor vehicles, and/or Rideshare vehicles.

## Inspections

The fleet of vans is a significant program investment. The inspection process, developed to be quick and user friendly for drivers, helps maintain that investment by keeping the vans operating properly.

**It is very important to report defective equipment, new damage, and van problems--or even suspected problems--to your maintenance RSR as soon as possible.** Catching small problems before they grow larger cuts repair time and expense significantly.

If any part of your inspection leads you to believe your van is unsafe, **Do Not Drive It!**

When you call, always be prepared to leave your name, group or van number, return phone number and a brief message. With hundreds of groups to manage, your RSR will be able to help you more quickly with this information.

### **Minor Van Upkeep**

During a vehicle inspection you may note minor problems such as a burned-out headlight, worn wiper blades, or low oil level. You may handle minor problems such as these, as appropriate. The guidelines listed below will help you deal with minor van upkeep:

- Miscellaneous expenses (not to exceed \$50) may be purchased with the assigned gas card, or personal credit card, check, or cash. Acceptable purchases are items such as wiper fluid or an ice scraper—but please check with your maintenance or accounting RSS prior to making your purchase to ensure the expense is reimbursable. Some acceptable purchases can be found in the reporting section.
- You must submit the receipt as part of the monthly report with the following information written on the receipt:
  - Your HOV and group numbers
  - A purchase description (if not already indicated)
  - Your signature
- If possible, shop around for a good price on the items you are purchasing because the money you save is money saved as part of your commuter van's program operating costs.

### **Daily Inspection**

The daily inspection is essential to helping manage program costs because it is the easiest and most common way to catch problems when they first appear. The inspection is simply a quick visual check of the inside and outside of the van for any signs of trouble. As always, notify your maintenance RSR about any problems you observe.

First, take a quick walk around your van before you get in. Look for:

- Fluid leaks (note the color of any), new body damage or any windshield cracks or dings.
- Tires that look damaged, low on tread or flat.
- Malfunctioning lights. Have a rider help you test your headlights, turn signals, brake lights and reverse lights.
- New previously unreported damage.

Finish up the inspection once inside your van.

- Be aware of warning lights that stay lit for more than a minute and check your gauges.
- Make sure your gas tank is at least 1/4 full.
- Make sure the heater, air conditioner and wipers function properly.
- Check your mirrors for damage while adjusting them as needed.
- Listen for unusual noises and note unusual smells made by the van.
- Finally, before entering traffic, check the steering and braking for responsiveness.

### **Monthly Inspection**

The monthly inspection should be done the same time each month for consistency. Ideally, you should perform it on the last day of the month so you can record your required month-end odometer reading for the bookkeeper at the same time. In addition to the daily inspection items, you will also check the following items:

- Assure the van is on level ground and check the following fluids to verify they are at the proper level. **Do not add fluids** without reporting the low level first. Review the owner's manual for reference on the fluid reservoir locations.
  - Coolant/Anti-freeze (check this first, when the engine is still cool)
  - Power steering fluid
  - Oil
  - Transmission fluid (check this with the engine running and warm)
  - Windshield washer fluid
- The average tire loses one to two pounds of pressure per month. Even new tires lose pressure. Use the tire pressure gauge in your glove box to compare your tire pressure to the recommended pressure in the owners' manual. This will help prevent blowouts, maintain better control during freeway driving, prevent excessive unsafe tire wear, and maximize gas mileage. Fill your tires at a service station if necessary.
- Make sure your van safety items are stored correctly. The spare tire, jack, triangle kit and snow chains should be in the rear of the van. Familiarize yourself with their location in the event that you may need them. For example, the spare tire and jack may be located in different locations depending on your van. Refer to the owners' manual in the glove compartment for the location.

## Maintenance

Our maintenance program combines vehicle cleanliness and mechanical health. There will be more details later but you and your group should always follow these cleanliness guidelines:

- Each group member should remove garbage daily and immediately clean up spills.
- Vacuum carpets and seats once a month – ideally during the monthly inspection.
- Wash the van twice a month. Use your assigned gas card to purchase a basic car wash at a participating gas station during a fill-up.

Typically, the primary driver is the maintenance contact but back-up drivers can also fill the role or be requested to help if the primary driver is not available.

## Preventive Maintenance Program

The vehicle maintenance program is meant to ensure a reliable and safe van for your commute. Several different types of preventive maintenance are scheduled to occur 6,000 miles or six months, whichever comes first. Common maintenance service happens at the following intervals:

- 6,000 miles - lube service, oil exchange, filter replacement and safety inspection
- 30,000 miles - transmission service added
- 54,000 miles - tune-up
- 90,000 miles- coolant system flush.

## Loaner Vans

Loaner vans are provided to groups on a "first come/first served" basis by reservation when their primary vehicle is in for service. No garage will release a loaner to a group without authorization from Rideshare Operations. Since loaners are used by many different groups, often one right after the other, special care should be paid to keeping it clean and returning it with the gas tank at least half full.

Some additional details to remember are:

- Follow the same inspection routine with the loaner that you would for your group's primary vehicle.

- If you receive a loaner that is especially dirty, alert your maintenance RSR and clean the van if possible. Use the gas card assigned to the loaner to pay for a van wash, if necessary.
- If the loaner van has a mechanical/operating problem, notify your maintenance RSR immediately and alert maintenance staff at the garage when you return the van.
- Loaners will generally need to be picked up at the maintenance facility by the driver; however, during an emergency, other arrangements may be possible.
- In the event a loaner is not available, you may be authorized to carpool and receive credit for that. See the “Expenditures” section in “Section V Reporting” for more details.

### Maintenance Scheduling

Any type of service visits, whether for preventive maintenance or vehicle repair, must be authorized and scheduled by Rideshare Operations first. Typically, the primary driver is the maintenance contact but back-up drivers may also fill the role or be requested to help if the primary driver is not available.

Your maintenance RSR will contact you for scheduling any routine maintenance within a week of the expected date. A sticker on the top left corner of the windshield will help you plan for the service by indicating the approximate date and mileage that the vehicle will be due for its next service. In the event that your van exceeds the date or mileage listed on your sticker, please call your maintenance RSR immediately.

There is approximately one loaner van for every 10 commuter vans on the road, (e.g. 100 loaner vans for 1,000 commuter vans). And, those loaner vans are spread out over approximately 10 maintenance garages. Accordingly, scheduling any type of maintenance, whether routine service or not, can require a great deal of coordination. Your maintenance RSR will work with your schedule as much as possible but please be flexible. In many cases, as soon as one loaner van is returned by a group, another group is there and waiting to pick it up.

### Maintenance Facilities

The commuter van fleet is serviced by a variety of maintenance facilities throughout Puget Sound. Each group is assigned to a specific garage. However, in the event that you are having a mechanical problem with your van – you may go directly to the nearest maintenance facility for repair though you must contact your maintenance RSR as soon as you arrive at the maintenance location.

### Vehicle Drop-Off & Pick-up

Your maintenance RSR will contact you to schedule the time and date of your service appointment. When you are contacted, make sure you alert the RSR to any other van issues you might have noticed. It will save you a trip, and the program money, if they can schedule other repairs along with scheduled maintenance.

Please be certain to follow these steps for all service appointments:

- Take your van to your assigned garage on the scheduled date and time.
- Empty your van of personal belongings and any debris. Ensure the gas tank is at least half full.
- In your group notebook or logbook, record your primary van’s odometer reading when you drop it off. Keep track of the miles you drive to and from the garage also. **Before** you drive your loaner away, write down its HOV number and odometer reading. You will reverse the process when you pick your primary van back up.
- Check the loaner for body damage before leaving; report any damage to garage and RSR.

When your maintenance RSR contacts you to return the loaner and pick up your primary van, the process is very similar.

- Return the loaner **promptly** at the scheduled time and date so the next group can use it.

- Empty the loaner of personal belongings and any debris. Make sure the gas tank is half full. Remember to use the gas card assigned to the loaner.
- Park in the designated space and return the keys with the attached gas card to the garage staff.
- Record the ending odometer reading of the loaner in your group notebook or logbook. **Before** you drive your primary van away, record the odometer reading to account for any miles driven during servicing. Your bookkeeper will need these numbers so the group will not be charged for those miles.
- Alert the garage staff and your maintenance RSR if you encountered any van problems with the loaner.
- Check your van for body damage before leaving. Report any damage to the garage and your RSR.

### Emissions Testing

Because Rideshare Operations must comply with Washington State Law and perform emissions testing on a portion of its fleet vehicles each year, you may be required to take your van in for testing at no charge. Further action may be required depending on the outcome of the test.

In all cases, whether for preventive maintenance or emissions testing, prompt attention to scheduling is required.

### Emergencies

Although the safety and accident record of our Commuter Van Program is impressive, accidents and breakdowns do occur. While most are minor, it is important that you know how to handle emergency situations to protect lives and ensure that liability questions are handled properly.

### Emergency Roadside Assistance

Your monthly fare includes emergency roadside assistance. In the event of any emergency situation outside of office hours, you may call 206-625-4500. During office hours, you may contact your group or maintenance RSR directly.

**NOTE:** The roadside assistance does not cover expenses related to negligence, such as running out of gas or locking keys inside vans. As every driver is responsible for keeping the van at least 1/4 tank full and having a key in their possession, they should be prepared to pay the roadside assistance company directly or utilize a personal service such as AAA in those situations.

### Accident / Emergency General Guidelines

The following items include information and guidelines for accidents and emergencies:

- Any situation involving vehicle or property damage, injury, or the potential for medical assistance or liability claim must be reported immediately to Rideshare Operations at 206-625-4500.
- Situations involving your passengers as they enter or leave the vehicle unrelated to your operation of the van (e.g. a passenger falling while disembarking or smashing a finger when closing door) should be reported to our office.
- The severity of the situation determines if you need to obtain immediate assistance or if you can handle the situation yourself. For instance, a minor non-disabling, fender-bender with no injury during rush hour traffic is best handled on your own; whereas, a serious accident that involves injury or fatality, or an accident caused by mechanical failure in your van, must be handled with the assistance of Rideshare Operations personnel.
- Regardless of the severity, report any unusual or emergency situation to our office within 24 hours.
- Each van contains a packet of information in the glove box with instructions for handling emergency situations. Refer to the "Emergency Procedures" card for instructions on how to handle accidents or breakdowns.

## Using Reflective Triangles

Each van is equipped with a set of three reflective triangles. These are to be used whenever your van is stopped or disabled on the roadway or shoulder. You should familiarize yourself with how to open the triangles in case of an emergency.

### Placement on a Single-Lane Roadway

Place one triangle 10 feet behind the vehicle, one more 100 feet behind the vehicle, and the third one 200 feet behind the vehicle. The triangles should be angled slightly toward the roadway.

### Placement on a Two-Lane Roadway, Curved Roadway, or Hill

Place one triangle 100 to 500 feet in front of the vehicle, another one 100 to 500 feet behind the vehicle, and decide the best location for the third triangle by evaluating the roadway. The third triangle should be placed 10 feet either behind or in front of the vehicle depending on where you feel there is the greatest need for warning. The triangle should be angled slightly toward the roadway.

**NOTE:** Don't forget to pick up the reflectors after the van is towed.

## Insurance Information

King County Metro provides insurance coverage for the Commuter Van Program. If you are involved in an accident, when you are exchanging insurance information, give the other party the office phone number (206) 625-4500 or (800) 427-8249. Although King County Risk Administration will handle the claim, the other party should contact Rideshare Operations for details and further instructions.

Liability coverage shall be provided at statutory limits for negligent operation of a van for and including bodily injury, property damage, comprehensive, collision, and uninsured motorist protection; provided the van was being operated by a Participant authorized by King County Metro Rideshare Operations and for a purpose permitted under the Terms and Conditions attached to the Commuter Van Program Application & Agreement.

Metro's self-insurance coverage does not extend to the loss of a group member's personal property while it is in the commuter van. All personal property in a Metro van is there at the risk of the group member. We suggest that all personal items be removed any time the van is not occupied.

## Accident Procedures

In the event you are involved in a collision or serious accident, remain calm and act promptly. If necessary, ask another driver or rider to help with the situation. Refer to the emergency procedures packet located in your glove box. It will guide you through the following accident procedures. If for some reason the packet is missing, call 206-625-4500 for a replacement.

1. Protect the scene.
  - turn on hazard flashers and move the van out of traffic, if possible
  - make sure riders are in a safe location – inside the van, if possible
  - set-up your triangle kit
2. Obtain medical assistance for injured persons by calling 911.
3. If the accident is **serious** or involves an injury, fatality, or was caused by mechanical failure in your van, call a **Metro Traffic Coordinator – 206-684-1705** and identify yourself as a vanpool, vanshare or metropool driver. Ask that they contact all emergency support needed and Rideshare Operations. A Service Supervisor or Safety Officer will come to the scene.

**NOTE: Do not call the Metro Traffic Coordinator for minor accidents.**

4. Notify the police or Washington State Patrol. If police are on the scene, obtain the officer's name, badge number and jurisdiction and report file number. Be sure to notify police immediately for hit & run accidents or unusual situations like DUI or non-insured drivers.

5. Exchange information with ALL other drivers involved (if multiple vehicles are involved):
  - complete the back of the accident envelope
  - name, address, phone number
  - driver license number
  - vehicle license number
  - insurance company name and policy number (you are insured through the King County Metro Transit Division: 206-625-4500).
6. Ask all witnesses to complete and mail the postage paid **'Witness Courtesy Cards'** in the emergency procedures packet within two business days.
7. Complete a collision and incident report located inside the packet – or find it online on our resources pages - and mail it to Rideshare Operations within two business days.
8. Call **Rideshare Operations** at 206-625-4500 as soon as possible, no later than 24 hours after the accident. If the van is safe to drive, you will be asked to go to a designated body shop for pictures and a damage estimate. Take your van to the body shop within two business days. It is critical that we document the condition of the van as close to the time of the accident as possible. If your van is disabled as a result of the accident, follow the steps listed in the following breakdown procedures.

**NOTE: Only approved drivers are permitted to operate a King County commuter van and are covered by King County Metro's self-insurance.** Our strict driver selection criteria and our driver orientation ensure only preferred drivers are approved. Annual motor vehicle reviews are conducted for all drivers to ensure continuing approval. **Drivers must report any moving traffic violation they receive, whether driving a commuter van or another vehicle, to Rideshare Operations within two business days. If you have questions about accident procedures, call your Group RSR.**

### **Breakdown Procedures**

A breakdown is any event, accident or otherwise, which disables your van. Common types of breakdowns include flat tires, fluid leaks, dead batteries and disabling accidents. Adhering to our inspection and maintenance guidelines, as well as following safe driving habits, greatly reduces the likelihood of a breakdown. However, they can occur and there are established procedures located on the emergency procedures packet located in your glove box.

If a breakdown does occur, first ensure the safety of your riders and the van. Next contact your maintenance RSR during business hours for assistance, or call 206-625-4500 outside business hours or if you don't have the phone number for your RSR. The Rideshare Operations response will depend on the type of breakdown, location, and time. Your van will be towed when necessary and alternate transportation for you and your riders will be coordinated. Take note that adverse weather can lead to longer response times from towing companies. Some other items to remember are:

1. Do not abandon a disabled van. Remain with the van and by the phone you are using until you have received a return call and coordinated all actions with Rideshare Operations.
2. Be prepared to provide your exact location as well as the direction the van was travelling. If on the freeway, report whether the van is on an inside or outside shoulder and the nearest exit number to your front or rear of the van.
3. Be prepared to provide your HOV number. If you are using a loaner van, you will need to provide that HOV number instead.



4. If the van will be towed when you are not by it, lock the van but do not leave the keys inside. You will need to coordinate with the responding Rideshare Operations staff person so that the tow truck operator will know where the key is located.

### **Vandalism/Other Incidents**

Other emergencies may occur from vandalism, theft or attempted break-in. Never leave wallets, purses, briefcases, backpacks, shopping bags, electronics or other valuables in the van. They are an invitation to thieves. If your van is stolen or damaged from theft or vandalism make sure you do the following:

- When the damage is discovered, call your local law enforcement agency and file a report with them. They will assign you a case number for future reference.
- Report the incident to the Rideshare Operations within 24 hours. You will be asked for the case number, the county or city jurisdiction where your report was filed, and details of the incident.
- If the van is drivable you will be asked to take the van by the body shop for a picture and estimate of damages or to document no damage.

### **Natural Disaster or Civil Emergency**

In the event of public emergency such as a natural disaster or Homeland Security alert, King County reserves the right to recall, restrict or re-assign all King County vehicles, including commuter vans. Any such decision will be dictated by the situation but the priority will always be safe commuter van operations during such emergencies. Your group will not be responsible for vehicle operation costs incurred from such an event.

## **Additional Information**

### **Driver Approval Expiration**

Any driver who leaves the program must contact Rideshare Operations for approval before they may drive a commuter van again. If you leave one group to join another, make sure you contact Rideshare Operations to ensure your approval follows you to the new group. Also, make sure to notify Rideshare Operations if you change your name, address, or phone numbers.

### **Purchasing Gas**

Because Rideshare Operations does not pay federal excise tax on gas purchased with the gas card assigned to your group, [gas purchases](#) should only be made with the card assigned to your vehicle and at a [participating vendor](#).

#### **Using the Assigned Gas Card**

- Simply swipe the card, enter your exact odometer reading and fill your van.
- If the first swipe doesn't work, take it to the attendant for manual entry to prevent a locked account.
- **Never leave the gas card in the van or share it with other groups.**
- If you rotate drivers, make sure they have the card when driving.
- Notify Rideshare Operations immediately if the card is lost or stolen.

#### **Using Personal Credit Card or Cash**

If you must purchase gas using a personal card or cash, you must complete the VanPool, VanShare and metropool Expense Reimbursement Form —provided by your accounting RSR—and submit it and the receipt or a legible copy to Rideshare Operations for reimbursement.

## Cleaning the Van

Please follow these cleanliness guidelines:

- Each group member should remove garbage daily and clean up spills immediately.
- Vacuum carpets and seats once a month.
- Wash the van twice a month. Use your [assigned gas card](#) to purchase a basic car wash at a [participating gas station](#).
- The van must be washed and vacuumed prior to its return to the Van Distribution Center.

**NOTE:** A van that is returned in poor condition, beyond normal wear and tear, will be cleaned professionally and the group will be responsible for this additional cost of \$120.

## Tire Chains

The first snowfall every winter often sends drivers scrambling to put on their chains only to find they have broken links or no chains at all. Check your chains for damage and for proper size to fit your van before you need to use them.

To check your chains, lay them flat and completely untwist all the links to make sure there are no kinks or broken or missing links. Make sure that both ends of the chains lock together. Leave the ends locked together when you return them to storage so that the chains do not become twisted. If you need assistance with chains, call your maintenance RSR.

When attaching the chains, follow these guidelines:

- Always follow the manufacturer directions (included in the box) for installation.
- The van should be securely parked on a flat surface to preventing it from rolling or sliding.
- Chains should be installed on the drive axle tires only. Most vans are rear wheel drive, with the exception of the Chevy Uplander that has front wheel drive. If you have any question about drive axles – please contact your maintenance RSR.

## Bike Racks

Upon group request and availability, a bike rack may be provided for your vehicle. The rack must be attached according to manufacturer specifications and used according to Rideshare Operations' policy (provided at time of bike rack delivery).

- Only King County Metro approved commuter van bike racks will be mounted on the vans.
- Manufacturer instructions for mounting and securing bike racks will be provided.
- Manufacturer Instructions must be followed for installation of the bike rack with secure hitch pin (locking or non-locking).
- Only Manufacturer Straps (nylon or rubber) are to be used to secure bicycles to the bike rack.
- It is the driver's responsibility to ensure the bike rack is properly installed and secured to the van according to the manufacturer instructions.
- It is the driver's and bicycle owner's responsibility to ensure the bike is mounted and secure to the bike rack according to the manufacturer instructions.
- The following sticker will be displayed on the bike rack and inside the van on the dashboard area.

**BICYCLES MUST BE  
PROPERLY SECURED**

If you have a bike rack with any missing parts, please contact our office for replacements as needed.

### **Additional User Allowable Mileage/Personal Use - updated Jan. 2022**

The primary purpose for program vehicles is for commuting. However, approved drivers may apply for an 'excess use' authorization for van use outside of the commute. These excess, personal-use miles are limited to 40-miles per month, are included with the assigned program fare and are intended to cover route detours, fueling, washing, shuttling between drivers' homes and the occasional errand. Once the 40 miles are used, then drivers must pay for additional miles at \$0.60 per mile. Up to 250 total excess use miles are allowable per month, and are to be paid for by the driver(s) using them. **Drivers MUST be approved for this benefit. Proof of personal insurance and personal vehicle ownership is required. Please note, personal use is not available to participants with "Pay-Per-Mile" insurance coverage, as "Pay Per Mile" insurance coverage does not insure vehicles on a ridesharing platforms or as part of a ridesharing program.** Contact Rideshare Operations if you are unsure whether or not you are authorized to use the van in this way. Primary drivers have first priority but must allow backup drivers reasonable access to the van for acceptable purposes as well if they are authorized by Rideshare Operations.

### **There are several scenarios where commuter vans MUST NOT be used.**

- The vehicle **MUST NOT** leave the State and must stay within 200 miles of Seattle.
- The vehicle **MUST NOT** be used for-hire or to transport any groups or individuals without express authorization from Rideshare Operations. Vehicles **MUST NOT** be used for TNC-use or to transport sports teams, school, youth, scouting, senior or community groups.
- **The vehicle MUST NOT be used for business purposes**—you must not use the van during work hours to travel or transport co-workers to meetings or other functions as this constitutes business use and is prohibited without a business-use agreement.
- The seats **MUST NOT** be removed.
- The vehicle **MUST NOT** be used to haul:
  - garbage
  - debris
  - excessive loads
  - trailers
- The vehicle **MUST NOT** be used for off-road travel, ski trips or going over mountain passes during snow.
- The van **MUST REMAIN** available and clean for its commuting purpose.
- The van **MUST NOT** be driven over bridges/roads that post a maximum capacity of 4 tons or less.
- Accessories **MUST NOT** be added or removed – this includes appearance items or additional equipment.
- Drivers **MUST NOT** use the vehicle for hire or to transport any groups or individuals without express authorization from Rideshare Operations. The vehicle **MUST NOT** be used for TNC-use, and should not be used to transport sports teams or school, youth, scouting, church or community groups.
- Drivers **MUST NOT** use the vehicle to transport alcohol or narcotics in violation of the Revised Code of Washington (RCW) as it pertains to the operation of motor vehicles/Rideshare vehicles

### **Vanpool/Metropool Parking**

Vanpool vans and metropool vehicles are required to be parked off street at a driver's home overnight to protect them from damage. Parking exceptions may be granted to drivers who live in densely populated neighborhoods on a per case basis. Please remember to always park courteously and legally.

### **Vanshare Parking**

Vanshare vans must be parked in their assigned overnight parking location. Parking exceptions may be granted to groups for special circumstances on a per case basis.

## Adverse Weather

Weather patterns in the Puget Sound region are generally predictable. Winter here usually means roadways are wet and slick when it rains, snows or freezes. Being prepared for these conditions is the first step towards a safe winter commute.

- Hold a group meeting now to develop a bad weather backup plan. Be prepared to use an alternate route, personal vehicles or to even stay home.
- Create or update your group phone tree. Make sure everyone knows whom to call.
- Learn where to monitor weather reports and check them as necessary.

If you feel the weather has created a condition too hazardous to drive in, **DO NOT** drive the van. As the driver, it is your responsibility to drive only when you feel safe. A good rule of thumb is if you would be unable to drive your personal vehicle, you should not drive the commuter van.

## Carpools

Rideshare Operations will make every effort to assist a group with a loaner if their van is unavailable as a result of a breakdown, accident or service. If a loaner van is not available, you may be authorized to carpool. In authorized situations, carpool reimbursement will be provided to drivers of carpool groups of four or more (including driver). See Section V for details on reimbursement.

Reimbursement will not be provided for situations outside of Rideshare Operations' control (driver unavailability, adverse weather, keys locked in the van, etc.). If group members must carpool as a result of driver error or inaction, they should seek reimbursement directly from the driver assigned to drive that day.

Similarly, commuter van drivers have no responsibility for finding alternative transportation for individual riders who cannot use the van due to personal circumstances (e.g. temporarily conflicting work schedules or medical appointments).

Because there may be occasions when the van will not be available, we encourage you and your group to establish backup plans to avoid last minute planning. Use your phone tree when commuting plans change (see Section II of this manual for guidelines on setting up a phone tree).

## Strike Policy

Rideshare Operations has established the following guidelines in the event of a strike at a work location served by King County Metro Commuter Vans. It is imperative that the Rideshare Operations be notified by the driver if the possibility of a strike exists. The commuter group should meet and decide by majority vote whether to continue their commuter van during the strike. The group has three options and our office must be informed of which of these options the group has chosen. The options are:

- Operating with partial ridership (must have five riders minimum for this option)
- Reserving your van
- Disbanding

### Operating With Partial Ridership

If a strike involves only part of the group membership, the others may continue operating with a minimum of five riders. The following procedures apply to this option:

- Riders who continue using the van will pay their typical fare.
- Riders who are on strike will pay their percentage of the established fixed depreciation and insurance cost. Contact the groups' accounting RSR for the current rate. To determine a striking member's percentage, divide the appropriate fixed rate by the total number of riders.
- The van can operate with partial ridership for only 45 days.
- Commuter vans are not to be used to transport people for strike duty, picketing, or union meetings.

- Commuter vans are not to be driven across picket lines. Acceptable off-street parking arrangements outside picket lines must be established prior to the strike, and our office must be notified.

### **Reserving Your Van**

You may also choose to reserve your van to ensure its availability for use after the strike. Although the vehicle may be stored at your residence it must not be used for commuting. The following procedures apply to this option:

- Reserved vans should be taken home by an authorized driver and parked off-street at the driver's residence. Vans should be stored as specified:
  1. Fill the van with gas to prevent water condensation in the fuel system.
  2. Check and fill all other fluids as necessary in order to ensure proper lubrication of idle parts when the van is not in use.
  3. Inflate the tires to the proper air pressure in order to prevent the tires from settling and cracking when not in use.
  4. Park the van off the street on level ground.
  5. Set the emergency brake and put the transmission into park.
  6. Vans should be started and run for 5 to 10 minutes once a week to maintain the battery and circulate fluids.

If you have any questions, contact your maintenance RSR.

- A reserved van must recover the fixed depreciation and insurance rate. Contact the groups' accounting RSR for the current rate. Riders will be required to pay their portion of the fixed costs to reserve a seat in the van. Those riders who refuse to pay the fixed costs will not be guaranteed a seat when the van resumes operating.
- Drivers may continue to use and pay for all allowed additional miles if approved to do so.

### **Disbanding**

If the decision is made to disband, even temporarily, the van must be returned to Rideshare Operations' Van Distribution Center. An attempt will be made to reserve the van for the group depending on the length of the strike and the supply of vans for new groups. However, we cannot guarantee the availability of a vehicle. Contact your group RSR for instructions on disbanding and returning the van.

### **Primary Driver Free-Ride Group Option**

In return for the added responsibility, groups *may* offer their primary vanpool or metropool driver the option of riding for free as a benefit to driving—in these cases, the other paying riders cover the drivers fare between them. This is a group option, however most drivers who have an employer subsidy or drivers in smaller groups pay their fare so that everyone else's fare is less. Primary drivers in vanshare groups do not receive the driver free ride benefit.

## SECTION V: REPORTING

The role of bookkeeper is essential to the success and longevity of your group. This guide expands upon the information found in the Commuter Van Program Online Orientation.

Every group is assigned an accounting Rideshare Services Representative (RSR) to assist bookkeepers with completing monthly reports and to answer program accounting and policy questions. Your accounting RSR will also review your reports every month and contact you with any advice, support, or questions they might have. Likewise, you should feel free to contact your accounting RSR with any reporting questions. If you are unsure who your accounting RSR is, call 206-625-4500 for assistance.

**NOTE:** If you are the bookkeeper in a group that just got started, you will receive an introductory phone call or e-mail shortly from your accounting RSR.

### Program Background

Bookkeepers must understand program financial policies and fare structures in order to perform their reporting duties. This section provides a comprehensive overview of these policies and structures.

### Program Policy

Much of the commuter van program structure is based on the following policies.

#### Fiscal Responsibility

The King County Code requires that the fares set by Rideshare Operations recover 100% of the program's operating and capital costs and 25% of administrative costs.

This fiscally responsible policy means that program participants like you and the commuters in your van must pay for program expenses. Managing those expenses to keep costs low is one reason for the strict reporting and driving policies.

#### Minimum Ridership Requirement

The minimum ridership requirement for all groups is five participants who pay full-time fares.

#### Departing Riders

Departing riders must provide 15 calendar-days-notice to the driver and bookkeeper and are responsible for paying their fares during the 15-day period. Their fare will be prorated according to appropriate daily fare schedule.

#### Reporting Cycle

The reporting cycle sometimes causes confusion for bookkeepers. Generally speaking, every set of monthly reports is based on a two-month period. Mileage and expenses are always reported for the previous month while ridership and revenue is always reported for the current month. The table on the following page illustrates the annual reporting cycle.

Reporting on actual miles traveled ensures that groups are accurately charged. And, requiring riders to pay for the current month of travel protects bookkeepers from having to collect fares by tracking down riders who may have left during the month.

**Table 2: Reporting Cycle**

<b>Postmark Date</b>	<b>Reporting Cycle</b>	<b>Mileage &amp; Expenses</b>	<b>Revenue &amp; Ridership</b>
Jan. 10th	December / January	December	January
Feb. 10th	January / February	January	February
Mar. 10th	February / March	February	March
Apr. 10th	March / April	March	April
May 10th	April / May	April	May
Jun. 10th	May / June	May	June
Jul. 10th	June / July	June	July
Aug. 10th	July / August	July	August
Sep. 10th	August / September	August	September
Oct. 10th	September / October	September	October
Nov. 10th	October / November	October	November
Dec. 10th	November / December	November	December

**Late Fee**

Reports received after the 10th of the month are subject to a \$25 late fee. If you know your reports will not be mailed in time, you should call or email your accounting RSR prior to the 10<sup>th</sup> of the month to be granted a one-week extension and avoid the late fee.

**Fare Equity**

Participants paying a full-time fare must pay the same amount and in advance for the current month (i.e. one full-time rider must not be charged more than another full-time rider).

**Bookkeeper Processes**

The following practices will help with your reporting responsibilities.

**Establish A Group Checking Account.**

If you collect any amount of money from your riders, you will need to set up a personal, no-frills checking account separate from your own personal account. Your riders' checks, made payable to the bookkeeper, will be deposited to this account. Only you or another approved bookkeeper may use and be a signer on the account. Send only one check to Rideshare Operations for the balance due Metro shown on the Monthly Report.

Most banks have free checking accounts. Use those if at all possible to save the program money and help keep fares low. Those that do not may have service fees that range between \$3 and \$9. If you must use one of those, you will learn how to claim these fees as an expenditure on the vanpool/ metropool report. You should also request the minimum amount of checks when you order them (e.g. an order of 50 will cover 4 years).

When claiming bank expenses or check ordering fees, you must provide documentation to support the claim with an official bank statement. **Note:** King County Metro will not cover any Non-Sufficient Funds or other bank charges.

**Collect Fares On The First Operating Day Of The Month.**

Because monthly reports, which include fares and copies of fare media, must be received by the 10th of the current month, collecting fares from riders on the first operating day of the month gives you as much time as possible to handle depositing checks and completing the reports.

Make sure participants understand they need to let you and the driver know of any planned absences. Then, in advance of the absence, they will need to make sure you have their fare payment on the first operating day of the month.

### Consider a Reserve Fund

Many groups maintain a special reserve fund to be used at the group's discretion. A reserve fund can guard against steep fare increases when your ridership drops or can be beneficial to cover the increased expense in situations when a rider drops out of the group without giving a 15-day notice. Many groups also use a reserve fund to cover parking or ferry fees, excess commuting mileage, or even weekly coffee for the group.

One way to generate a reserve fund is to collect an additional nominal amount from each rider each month (e.g. rounding up individual fares to the nearest dollar or five dollars). If a reserve fund is created this way, the participants must understand that this amount is in addition to their regular monthly fare. **NOTE:** A reserve fund is not a program policy, and no rider can be required to pay any more than his individual fare.

You can also work with the primary driver and use the rider waiting list (if the group has one) to find part-time riders. When your group has a seat vacancy for any length of time, fill it with a part-time rider, charge these riders a prorated daily fare and then deposit that fare into your group checking account for a reserve.

### The Fare Schedule

Rideshare Operations maintains a wide variety of fare schedules for calculating a commuter group's monthly fixed rate.

#### Fare Schedule Types

No matter how many days per week your commuter group uses your van for regular commuting, there is a fare schedule for you. There is even a "9/80" fare schedule for the most common compressed work week (working nine days in a two-week 80 hour work period).

Every schedule includes pricing for round trip mileage from 20 up to 150 and for every size vehicle in the program (5-, 7-, 12- and 15-passenger vans). Fares for shorter or longer round-trip commutes are also available on a case by case basis.

Finally, the schedules are two-sided with one providing monthly rates and the other providing daily rates. Daily rates are used for:

- riders who join or leave the group mid-month
- part-time/occasional riders
- new groups that start mid-month

#### Calculating Fixed Rate

Every **vanpool**/metropool group pays a monthly fixed rate based on van size, daily round-trip miles (RTM) and the average number of days commuting per month. The table to the right displays the average workdays per month for each fare schedule type.

**NOTE:** The fixed rate for every **vanshare** group is \$200.

Fare Schedule	Days Per Month
3 days per week	13
4 days per week	17
5 days per week	21
6 days per week	26
7 days per week	30
9 days every 2 weeks	19



Look at this example of a cut-out from a monthly fare schedule to see how the monthly fixed rate of \$590 was calculated for a group in a 7-passenger van, operating five days per week with a 35 mile round trip commute.

You would follow the same process for your particular group. Once you have the correct fare schedule:

- Find your van size
- Find your round trip miles
- Find the associated fixed rate

Fare Round Trip Miles	Monthly Fixed Rate	7 Passenger Van Number of Paying Participants		
		5	6	7
20	\$ 429	\$ 85.80	\$ 71.50	\$ 61.29
25	\$ 483	\$ 96.60	\$ 80.50	\$ 69.00
30	\$ 536	\$ 107.20	\$ 89.33	\$ 76.57
35	\$ 590	\$ 118.00	\$ 98.33	\$ 84.29
40	\$ 644	\$ 128.80	\$ 107.33	\$ 92.00

**NOTE:** The above example is for illustration purposes only. For the most up-to-date monthly report please visit the Resources tab at [kingcounty.gov/metrovans](http://kingcounty.gov/metrovans)

### Round Trip Miles (RTM)

To calculate your RTM, determine the number of miles traveled on a typical commuting day and then round up to the next 5-mile increment. Because your RTM is every mile traveled from where the van stays overnight to work and back, it should only change if you permanently change your route.

**NOTE:** Vanshare groups are limited to a daily 20-mile round trip.

### Calculating Monthly Fares

After finding the monthly fixed rate on the fare schedule, you simply divide that number by the number of paying participants in the group. Using the example above, with seven paying participants, the individual monthly fare would be \$84.29 (\$590/7).

As the fare schedule shows, adding more riders lowers everyone's monthly fare.

### Calculating Daily Fares

Every fare schedule type has two sides, one for monthly fares and one for daily fares. Daily fares for part-time riders are calculated using the same process on the daily fare side of the same fare schedule.

Using the same group as the previous example, notice that the daily rate is \$28.10. With seven paying participants, you would charge a part-time rider \$4.01 for riding one day.

Calculating part-time fares is easy but reporting them may be challenging. If you have a part-time rider, contact your accounting RSR for assistance.

Fare Round Trip Miles	Monthly Fixed Rate	7 Passenger Van Number of Paying Participants		
		5	6	7
20	\$ 20.43	\$ 4.09	\$ 3.41	\$ 2.92
25	\$ 23.00	\$ 4.60	\$ 3.83	\$ 3.29
30	\$ 25.52	\$ 5.10	\$ 4.25	\$ 3.65
35	\$ 28.10	\$ 5.62	\$ 4.68	\$ 4.01
40	\$ 30.67	\$ 6.13	\$ 5.11	\$ 4.38

## Fare Payment

The majority of participants in the commuter van program receive some sort of fare assistance from their employer. Rideshare Operations does not invoice employers or individual directly. However, there are a number of fare payment options for participants. The most common are described below:

- Annual Business Passport
- Monthly Metro Vanpool Passes
- Vouchers
- Cash Subsidy
- Cash / Personal Checks
- Special Promotions and Incentives

### Annual Business Passport

Business Passport is a comprehensive, annual transportation pass program for employers. Through Business Passport, employers may provide subsidies to their employees using vanpools, metropools and vanshares. The amount an employer provides ranges from ranges from \$20 towards a monthly fare to as much as covering the fare completely. To use the subsidy, your participants must submit a completed Business Passport Use Form.

### Monthly Metro Vanpool Passes

The only monthly pass accepted as payment towards a monthly fare is the Metro Monthly Vanpool pass. The pass is available as a a one-zone or two-zone peak pass and in addition to being able to use it to pay towards a monthly fare, it can also be used for rides on Metro buses.

#### Non-Transferable Nature

The Business Passport and Monthly Metro Vanpool pass used to pay a monthly fare are not transferable to another person.

#### Pass Eligibility

Only participants paying a fare can use a Monthly Metro Vanpool pass or Business Passport subsidy. The value cannot be applied to other expenses, additional/personal use, or another rider's fare.

#### Value Towards Monthly Fare

Because the value of a participant's Business Passport subsidy or Monthly Metro Vanpool pass does not always equal their monthly fare, there may be occasions when a balance is still due (e.g. pass value is \$90 but monthly fare is \$105). When the value of the pass is **less** than the fare, the participant writes a check to the bookkeeper for the difference.

When the value is **greater** than the monthly fare, the value up to the amount of the monthly fare may be used. The maximum value that can be claimed cannot exceed that particular riders' individual fare. No credit or refunds may be given, nor can excess value be applied towards group expenses, additional/personal use or another participant's fare.

### Vouchers

Some participants receive vouchers from their employer. Vouchers may be applied directly towards monthly fares.

Participants may provide you with one or more vouchers to apply towards their fare each month.



**NOTE:** Credit **will not** be given if the amount of the voucher exceeds the monthly fare.

### Cash Subsidy

Some participants receive a cash subsidy from their employer for full or partial commuter van fare payment. Those receiving a cash subsidy need to obtain it at the first of the month. The cash subsidy is then given to the bookkeeper along with any additional fare that may be owed.

### Cash / Personal Checks

Participants may also provide their bookkeeper with personal cash or check, payable to the bookkeeper. .

**Note:** Cash must not be sent with the monthly reports, whether it is a subsidy or personal cash. See the Section above, “Bookkeeper Processes, Establish A Group Checking Account.”

### Special Promotions and Incentives

Occasionally, employers or other organizations offer special promotions and incentives that may be valid towards a monthly fare. Contact your accounting RSR if you have a participant who wants to pay their fare in this manner to make sure the fare media is valid towards their fare.

## THE MONTHLY REPORTS

Your primary responsibility every month as a bookkeeper will be to complete your monthly vanpool/metropool and ridership reports and submit them to Rideshare Operations in a timely fashion. The following pages will walk you through both reports. The examples provided are based on the Excel version of the reports and are for illustration purposes only. To view and download the most current reports, please visit the Resources tab at [kingcounty.gov/metrovans](http://kingcounty.gov/metrovans)

**NOTE:** Although one of the following reports is referred to as a ‘vanpool’ report, both vanship and vanpool/metropool bookkeepers use the same forms.

### Vanpool/Metropool Report

The completed example of a vanpool/metropool report on the following page (**Figure 1: Vanpool Report**) is used to track mileage, revenue and expenses and is divided into three sections.

As the report will show, bookkeepers begin by entering the reporting period and basic group information (van size, operating schedule, identification numbers, etc.). Remember, the reporting period will be the month that just ended (for the mileage and expenses) and the current month (for ridership and revenue).

#### Section I: Mileage

The mileage section is simply total miles traveled during the previous month minus allowable miles, other deductions, and the 40-mile driver bonus. If you have a positive balance (more miles traveled than allowed), there will be a charge for additional/personal miles to the driver who drove those extra miles.

Talk with your driver to obtain all necessary odometer readings so that you may calculate your total miles traveled. You may need to remind them about writing down the odometer readings in your group mileage logbook for all the different occasions that it is necessary.

First, enter your ending odometer reading from when the van stopped on the last day of the previous month (8,000 miles on 03/31 in this case). You may need to remind your driver to record this. Your beginning mileage will be the ending odometer from last month’s report (6,800 miles on 02/28). Subtract beginning from ending to get your miles traveled in your primary vehicle.

If your group uses a loaner vehicle during the month, make sure the driver writes down the vehicle number and starting and ending mileage. You will need to report these numbers. Perform the same calculation for each vehicle used and add all results to get your total miles traveled (1,250 in this example).

Use actual odometer readings – do not estimate.

**Figure 1: Vanpool/Metropool Report**

King County Metro Vanpool Monthly Report For					March/April		2013	
Van Size	7	Schedule	5-Day	Van #	22	Group ID #	15	
<b>I. Mileage - for the month of</b>				<b>March</b>				
Calculate Total Van Miles	Van #	Loaner #	Loaner #	Loaner #				
	22	18	0	0				
Ending Mileage	8,000	36,250	0	0				
Beginning Mileage	6,800	36,200	0	0				
	1,200	50	0	0	Total Miles Traveled	1,250		
Calculate Allowable Miles								
Round Trip Miles	55							
# of Working Days	21							
	1,155				Less Allowable Miles	(1,155)		
Itemize Other Miles								
Maintenance Shuttle	20							
Driver Training	25							
Other								
	45				Less Total Other Miles	(45)		
					Less Monthly Driver Bonus Miles	(40)		
					Personal Use/Excess Miles	10		
<b>II. Revenue - for the month of</b>				<b>April</b>				
Fixed Rate (from fare schedule)								\$ 804.00
Based on new Round Trip Mile of (if different than last month)								
Itemize Fare Media (filled from Ridership Report)								
Annual Business Passport								\$ 152.00
Vouchers								\$ 120.00
Monthly Metro Vanpool Pass								\$ 109.00
Other Subsidy and Payment Types								\$ -
Total Fare Media Amount								\$ 381.00
Personal Use Charge	10	miles @	\$ 0.60	per mile				\$ 6.00
Late Fee if postmarked after the 10th of the current month.	Add \$25							\$ -
Monthly Report Adjustment (if credit, enter minus (-) sign before amount)								\$ -
Other								\$ -
							Total Revenue	\$ 429.00
<b>III. Expenditures (approved expenses)</b>								
Bank Charge (submit copy of bank statement)								\$ 3.75
Approved Carpool Expense	Date	Rate	RTM	# Carpools				\$ -
	vans	\$ 0.30						
	LEAF	\$ 0.25						
NOTE: all other expense items are claimed by using the Vanpool and Vanshare Reimbursement Form								
							Total Expenditures	\$ 3.75
					check payable to King County Metro		Balance Due Metro	\$ 425.25
Comments								
Please send more postage paid envelopes.								
Prepared By								
Type or Print Name Legibly			Signature			Date		

**PRINT AND SUBMIT TWO COPIES**

## Calculate Allowable Miles

Allowable miles are the number of miles the group can commute given the fixed rate paid by the group. Your allowable miles are calculated by multiplying your daily round trip mileage (RTM) by the actual number of days your group commuted (in this case 55 RTM and 21 days of commuting).

**NOTE:** Vanshare is limited to a daily 20-mile round trip.

## Report Other Miles

There are several different types of “other” miles that you may need to keep track of for reporting purposes so that you may deduct them from the total miles traveled.

### Maintenance Shuttle Miles

If your van goes in for service, have your driver keep track of how many miles it takes to get to and from the maintenance garage. Your driver will also need to tell you how many miles the garage staff put on your van. In this example, the garage was eight miles each way and the garage staff drove the van four miles for a total of 20.

### Driver Familiarization Miles

Each newly approved driver in the commuter van is allowed 25 miles to familiarize themselves with driving and operating the van and should be used within one month of completing the orientation.

### Additional Use Allowable Miles

Groups receive forty (40) additional miles each month as part of their fare payment. These miles are for use by the authorized commuter van drivers and intended to cover route detours, fueling, washing and shuttling between drivers' homes. The miles are automatically deducted each month whether they are used or not and cannot be accumulated over time.

### Excess Miles/Personal Use Guidelines

Any miles travelled above and beyond the approved route, mileage and 40 additional use miles are considered excess/personal miles and must be tracked in the 'Personal Use Charge' field and paid for by the authorized driver who uses them.

In the Figure 1 example, there were 10 miles in excess of the 1,155 allowable miles recorded. Commonly, these miles occur in two ways: the daily RTM for the group is too low or, drivers authorized to do so are using the van for excess/personal use.

All drivers should enter their name and starting and ending odometer readings in their groups' notebook or mileage logbook when using the van for excess/personal use. Authorized drivers may use and pay for up to 250 miles per month above the allowable commute miles.

## Ridership Report

The Ridership Report tracks ridership for the current month as well as any riders who left in the previous month. After entering the same group identification information in the header, you will need to enter the following information for every participant in your group (see example on following page):

- Their position in the group – primary driver, bookkeeper, backup driver, rider, etc.
- Last and first name – printed legibly if using the manual forms
- ORCA card number (See Steve Henry, Tom Devlin and Julie Paone in the example)
- Their employer
- Whether or not they rode last month
- For new or departed participants, the date they started or the date they left
- Their monthly fare

- Whether or not the primary driver is riding for free
- The value of any Business Passport subsidies, Metro Monthly Vanpool passes, voucher or other subsidies or payments.
- Net fare (after subtracting any subsidies, passes, vouchers or other fare payments from the monthly fare)

After entering that information, add up the columns and enter the result in the subtotals row. All those subtotals will be carried over to the vanpool/metropool report and entered into the revenue section.

### **New Full-Time Rider Joins Mid-Month**

If a new full-time rider joins after a monthly report has been submitted, simply have them pay a pro-rated fare for the previous month, based on the number of full-time riders at the beginning of that month.

Then, on your next ridership report, you would then list them on two lines; once with a prorated fare for the month they started riding, and once with a full-time fare for the current full month.

### **Departing Rider**

If a rider leaves the van at the end of the month after providing a 15-day-notice, list them on the ridership report and indicate a termination date in the appropriate column (as the example on the following page shows) with no pass or fare information listed. You still need to list them on this report to alert Rideshare Operations to their departure.

If a rider plans to depart mid-month, the monthly fare would be calculated as in the following section on part-time riders.

### **Part-Time Riders**

Part-time riders pay the bookkeeper a daily fare as calculated in Section III. They are generally reported on the ridership report for the following month. In other words, a rider who rode three days in March would be reported on the April ridership report along with their prorated fare. However, “regular” part-time riders (those riders who only ride a few times a month but do so every month), may choose to pay for the current month like full-time riders. Because reporting part-time riders can be challenging, contact your accounting RSR for assistance.

#### **Fixed Rate with Part-Time Riders**

You can adjust the fixed rate paid by full-time riders when you have part-time riders in your group. To do so, simply subtract the total amount of part-time fares collected from the fixed rate and then split that difference between the paying riders. For example, assume the following:

- Six participants paying a full-time fare
- Monthly fixed rate of \$400
- Total part-time fares collected of \$60

Subtract the \$60 in part-time fares from the fixed rate of \$400 to get an adjusted fixed rate of \$340. Divide the adjusted fixed rate by the six full-time participants for a monthly fare of \$56.67 each (instead of \$66.67)

**Figure 2: Ridership Report**

King County Metro Vanpool Monthly Report For							April	2013	Van #	22	Group ID #	15					
IV. Ridership																	
Mark role for each rider		List full-time riders first, then part-time riders.					New or leaving riders		Monthly Fare	Annual Business Passport	Vouchers	Monthly Metro Vanpool Pass	Other Subsidy and Payment Types	Net Fare			
Primary Driver	Bookkeeper	Backup Driver	Rider	Part-Time Rider	Last Name	First Name	8-Digit ORCA Card Number	Employer							Rode Last Month	Date Started	Date Terminated
X					Halvorson	Jason		Boeing	X			\$ 134.00		\$ 60.00		\$ 74.00	
		X			Devlin	Tom	12345678	Photobus		4/4/13		\$ 134.00			\$ 109.00	\$ 25.00	
		X			Henry	Steve	20456789	Microsoft	X			\$ 134.00	\$ 85.00			\$ 49.00	
	X				Dahl	Jan	10122	Costco	X			\$ 134.00		\$ 60.00		\$ 74.00	
		X			Paone	Julie	34567891	Seattle Children's	X			\$ 134.00	\$ 67.00			\$ 67.00	
		X			Cook	Emily	00606	Crystal Works	X			\$ 134.00				\$ 134.00	
		X			Imori	Mika		Amgen	X		3/31/13					\$ -	
8																\$ -	
9																\$ -	
10																\$ -	
11																\$ -	
12																\$ -	
13																\$ -	
14																\$ -	
15																\$ -	
16																\$ -	
17																\$ -	
18																\$ -	
19																\$ -	
20																\$ -	
21																\$ -	
22																\$ -	
23																\$ -	
24																\$ -	
25																\$ -	
											Subtotals	\$ 804.00	\$ 152.00	\$ 120.00	\$ 109.00	\$ -	\$ 423.00
											Fixed Rate From Section II.	\$ 804.00					
											Adjustment	\$ -					
											Check math - should equal Fixed Rate	\$ 804.00					

**PRINT AND SUBMIT TWO COPIES**

### Shared Driving Arrangement

A shared driving agreement occurs when two drivers drive about half the time each, and agree to split the free driver's fare, thus each paying half a fare monthly. In a van with three people sharing primary-driver duties, each driver would have one-third of the free fare and thus pay two-thirds of a fare.

### Revenue

After filling out the ridership report, you will go back to the vanpool/metropool report to finish it by filling out the following areas.

#### Fixed Rate/Fare Media

Before you carry your sub-totals over, enter the current month (your miles in this example are from March and your revenue is from April). Then, enter the fixed rate. Next, carry over the subtotals for each type of fare media from your ridership report.

#### Additional Use/Personal Miles

Any additional use/personal miles in the mileage section are carried down and entered here. Calculate the personal use/excess miles total by multiplying the number of excess miles by the personal use mileage rate from the fare schedule (.60 in this example).

#### Late Fee

If the report will not be received by the 10th of the month and an extension was not authorized, include the \$25.00 late fee.

#### Monthly Report Adjustments

Your accounting RSR will review your reports and payments each month. That review may require that an adjustment be made. If so, your accounting RSR will send out a Monthly Report Adjustment letter (MRA) that will detail the reporting issue and request you either make a payment or take a credit in this section of the report.

#### Total Revenue

Your total revenue is calculated through the following:

Fixed Rate - Total Fare Media Amount + Personal Use + Late Fee + MRA = Total Revenue  
\$804 - \$381 + \$6 + \$0 + \$0 = \$429

### Expenditures

The only expenditures that may be deducted from Total Revenue on the Monthly Report are Bank Charges and Approved Backup Carpools. Report these expenditures for the previous month.

#### Bank Charges

To deduct checking account charges and bank fees associated with the commuter group checking account, enter the amount of the fees and include a copy of the bank statement with your monthly report.

#### Approved Backup Carpooling

If your van is unavailable due to mechanical malfunction, you may be authorized to carpool and receive credit for that. . The number of carpools that may be reimbursed depends on your assigned van size:

- Up to two (2) carpools for an 8-passenger van;
- Up to three (3) carpools for a 12-passenger or 11-passenger van;
- Up to four (4) carpools for a 15-passenger van.



Contact your accounting RSR for assistance with this section if you were authorized to carpool. Only groups that receive authorization prior to carpooling may claim this expenditure. Carpools are not authorized for reimbursement for inclement weather, lack of approved drivers or vehicles that are out of gas or have keys locked in the van.

**!** The Commuter Van Program does not reimburse expenses related to speeding or parking tickets, tolls, ferry fares, or items such as flashlights or first aid kits. In addition to gas, items such as wiper blades, deicer, and keys may be authorized. Call or email your accounting RSR before making a purchase to make sure it is considered an authorized expense and eligible for reimbursement. You will need to fill-out a Vanpool, Vanshare and metropool Expense Reimbursement Form—provided by your accounting RSR—attach a clear and readable copy of the receipt and submit them to Rideshare Operations for reimbursement. The reimbursement form may be submitted after the expense is incurred and does not need to be submitted with the Monthly Report Packet.

### Bookkeeper's Monthly Checklist

- Obtain van's end of month odometer reading from the driver.
- Obtain beginning and ending odometer readings for any loaner vans used by the group during the month.
- Obtain miles for maintenance shuttle, driver familiarization and other miles.
- Collect receipts for any cash or personal credit card purchases.
- Calculate and collect fares from participants.
- Complete the ridership and monthly reports.
- Send the monthly report packet to Rideshare Operations received by the 10th of the current month.
- The monthly report packet needs to include:
  - Two copies of the monthly report form.
  - Two copies of the ridership report form.
  - Completed and signed PAs from any new riders in the group.
  - Receipts for reimbursable cash and personal credit card purchases.
  - A copy of the bank account statement (if used and claiming bank fees).
  - Completed Business Passport Use Forms for all new participants as applicable.
  - Vouchers (if applicable).
  - A single check payable to King County Metro for any balance due.