

# Expanding Access to Our Communities: A Guide to Successful Mobility Management Practices in Small Urban and Rural Areas



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## Introduction

This guide is the culmination of research conducted as part of the National Cooperative Research Program (NCHRP) Project 20-65 Task 68: “Successful Mobility Management Practices for Improving Transportation Services in Small Urban and Rural Areas”. The objective of this research was to identify best practices and analyze successfully implemented rural and small urban mobility management programs that can be considered and replicated by State Departments of Transportation (DOTs) and their sub-recipients across a range of environments.

Communities across the country are seeking mobility management practices that offer innovative approaches for delivering coordinated transportation services, particularly when serving older adults, people with disabilities, veterans, and low-income individuals. In rural and small urban areas the challenges to provide mobility for these groups is especially daunting, as trips are often long in duration and may require crossing multiple jurisdictional boundaries. The mobility management focus on meeting individual customer needs through a range of transportation services is vital as communities balance increasing needs with funding and resources constraints.

Many communities are implementing successful mobility management services, and their mobility managers are out in front -- facilitating partnerships, negotiating agreements between providers, and identifying opportunities to share resources and reduce costs for transportation services. Mobility managers often serve locally as a neutral party, one that is seen as impartial when leading efforts to increase collaboration, to use available resources

### Guidebook Objectives

- Share the experiences, ideas, and recommendations of successful mobility management practices on how a similar practice could be replicated in other communities.
- Offer specific examples and tools that can be used to establish, improve, or expand a mobility management program.
- Serve as useful and practical resource throughout the planning, implementation, and assessment of a mobility management practice.

effectively, and to reduce costs related to transportation. They are championing efforts to effectively utilize the various funding programs and to provide coordinated transportation services. This guide is designed to support additional communities with similar efforts.

From a state-level perspective some DOTs have been encouraging local and regional mobility management practices, while others are grappling with how best to support these efforts. State DOTs are most familiar with funding and evaluating public transit services, and the “squishy” aspect of mobility management services, where two programs are rarely alike, can result in challenges when determining which programs to fund initially and which ones to support on an ongoing basis. This guide is also designed to assist with these efforts.

## **Mobility Management: A Primer**

*Recognizing that the primary audience for this guide will be those new to mobility management, or even the transportation field, it is important to first introduce the concept and provide some context for this guide.*

Mobility management is a term that has come to represent a formal definition of a transportation strategy that focuses more on the customer and their needs, and the meeting of these needs through the coordinated use of a variety of providers. Mobility management is an evolving concept that aims to improve specialized transportation, particularly for veterans, older adults, people with disabilities, and individuals with lower incomes through a range of activities. These activities look beyond a single transportation service or solution to a “family of services” philosophy that can offer a wide range of services and options to meet an equally wide array of community demographics and needs.

The National Center for Mobility Management (NCMM) notes that mobility management is an approach to designing and delivering transportation services that starts and ends with the customer. It begins with a community vision in which the entire transportation network—public transit, private operators, cycling and walking, volunteer drivers, and others—works together with customers, planners, and stakeholders to deliver the transportation options that best meet the community's needs. Mobility management:

- Encourages innovation and flexibility to reach the "right fit" solution for customers
- Plans for sustainability
- Strives for easy information and referral to assist customers in learning about and using services
- Continually incorporates customer feedback as services are evaluated and adjusted

The customized approach of mobility management means no two programs are exactly alike, and a variety of entities can serve as a mobility manager in a community. However, there are some common components that include:

- Partnerships between multiple agencies and organizations, including taxi and other private transportation providers.
- A customer-driven, market-based approach that provides customers with a variety of transportation options through individualized trip planning.
- One-stop travel information and trip planning centers that provide information on available transportation options and coordinate requests for transportation services. This may include operation of a central call center for customers to gain information on available transportation options and to schedule trips.

## ***Building Upon the National Focus on Mobility Management***

The guide is also meant to build upon and incorporate the national focus on mobility management efforts. In particular, the Federal Transit Administration (FTA) has encouraged greater use of mobility management in communities throughout the country by funding these efforts through the current Section 5310 (Enhanced Mobility for Seniors and Individuals with Disabilities) Program. In this program mobility management has been an eligible capital expense and eligible for 80 percent federal funding – even if the project involves hiring personnel or other typical operating expenses. The “Fixing America’s Surface Transportation Act” (FAST Act) includes a new discretionary pilot program for innovative coordinated access and mobility - open to Section 5310 recipients and subrecipients – to assist in financing innovative projects for the transportation disadvantaged that improve the coordination of transportation services and non-emergency medical transportation services.

Other efforts include the National Center for Mobility Management (NCMM), a technical assistance center funded through a cooperative agreement with FTA, and operated through a consortium of three national organizations—the American Public Transportation Association (APTA), the Community Transportation Association of America (CTAA), and Easterseals Inc. Numerous resources to support mobility management efforts are available at [www.nationalcenterformobilitymanagement.org](http://www.nationalcenterformobilitymanagement.org), and several key ones are highlighted in this guide.

## ***Guidebook Process and Development***

Much of the information, and many of the examples provided in this guide, resulted from research of current mobility management practices across the country. Through an on-line survey over 100 mobility management programs provided information on their services and efforts. Six of these practices were selected for further analysis. Their mobility managers were contacted to obtain additional details so that these practices could be profiled, and are presented in Chapter 7 of this guide.

In addition, resources through the NCMM were reviewed to gather additional information on existing practices. The research team’s experience working with current mobility management practices, as well as communities looking to implement a mobility management program, was also used in the development of this guide.

## ***Mobility Management in the U.S: A Snapshot***

The results of the research and on-line survey effort provide an important glimpse into mobility management practices in small urban and rural areas, information that can be helpful to communities considering a program or for State DOTs and other funders considering support for new or expanded mobility management efforts. While a full review of these practices is provided in the Resources section of this guide, the following themes and findings were identified:

- **The aspects of mobility management that encourage a broad approach to meeting customer needs through a variety of services, and emphasize movement of people through a wide**

**range of providers, are very evident.**

Many programs serve multiple population groups that often have transportation challenges. The majority of programs that responded to the survey noted multiple functions within their programs.

- **Partnerships and stakeholder involvement are critical to mobility management efforts.** While this finding was anticipated, it further demonstrates the importance of positive working relationships. It also highlights the need to support partnerships, like the ones between state Departments of Transportation (DOTs) and local mobility management programs that can be assisted through the outcomes of this research project.
- **Involvement in human services transportation coordination is a primary focus of many mobility management practices.** A top answer of survey respondents, this highlights the importance of their role in leading these efforts, and is particularly relevant to state DOTs who are often tasked with coordinated transportation planning as part of Section 5310 Program administration.
- **“Mobility manager” is now a part of the local transportation lexicon.** Based on the program descriptions provided by survey respondents, while different job titles were evident mobility manager or similar term was often reported as part of many programs.





## Using This Guide

*Like many mobility management efforts, this guide is designed to serve as a “one-stop” central point of information, providing information, tips, and resources in a central location. Therefore this guide is segmented for easy reference to specific topics:*

- **Section 1: Successful Approaches and Strategies** reviews the four key attributes and characteristics of successful mobility management that are further detailed in subsequent chapters.
- **Section 2: Community Outreach and Engagement** provides guidance to ensure a variety of stakeholders are involved when planning, implementing, or operating a mobility management practice.
- **Section 3: Needs Assessment and Program Design** discusses the importance of listening to the local community, conducting ongoing needs assessments, and designing services and programs to fit the identified needs.
- **Section 4: Program Evaluation and Assessment** provides guidance with gauging the effectiveness of a mobility management program, and making appropriate modifications as needed.
- **Section 5: Funding** discusses how successful mobility management programs are typically funded, and how they often implement services incrementally with available resources.
- **Section 6: Planning Considerations** discusses additional key considerations when preparing to implement a mobility management program.
- **Section 7: Program Profiles** highlights seven mobility management practices from across the country that can serve as potential models for other efforts.
- **Section 8: State-level Support** discusses how some states are supporting local practices, and how this assistance can help to expand mobility management in small urban and rural areas.
- **Section 9: Resources** provides a variety of information and tools that can be used to implement, improve, or expand mobility management services.



## Section 1: Successful Mobility Management Approaches and Strategies: An Overview

The customized approach of mobility management means no two programs are exactly alike. But through the review of various mobility management efforts across the country there are common components and specific strategies that are employed by successful practices -- and that can be considered when establishing, expanding or improving a mobility management program.

While efforts through mobility management practices are often interrelated, the successful approaches and strategies are primarily segmented by four key categories.



The process through which successful mobility management practices develop demonstrates the importance of each of these key categories, as well as their interrelationship:

**Community Outreach and Engagement:** The organizations with successful mobility management practices form partnerships with key community stakeholders, promote their services to the community, and lead or participate in coordinated transportation planning efforts.

**Needs Assessment and Program Design:** Successful mobility management practices conduct ongoing needs assessments, whether formal or informal, to determine community needs. Then the mobility management services are designed to meet those community needs.

**Program Evaluation and Assessment:** Successful mobility management practices employ some form of program evaluation and assessment. They track program outcomes using qualitative and quantitative performance measures with established goals and objectives.

**Funding:** Not surprisingly, funding strategies are the backbone supporting mobility management efforts. While successful mobility management practices explore a variety of funding sources, often the primary ones are through federal programs, along with other state and local support. They build their programs incrementally using what is available, and growing from their successes.

These key attributes of successful mobility management programs are detailed in the following sections, and a summary matrix that presents guidance with implementing a similar effort is provided in the Resources section.



## Section 2: Community Outreach and Engagement

Community outreach and engagement is a vital part of any successful mobility management program. This section provides guidance to ensure a variety of stakeholders are involved when planning or implementing efforts, offers potential methods to promote program services, and highlights the opportunities to connect mobility management efforts with coordinated transportation planning activities.

### *Form Partnerships with Key Stakeholders*

Successful mobility management practices seek and form partnerships with a variety of different stakeholders. While the key stakeholders will vary based on the nature or location of a mobility management program, this checklist on Page 9, adapted from FTA coordinated transportation planning guidance, serves as a useful tool when confirming a wide range of stakeholders are considered. This broad outreach is particularly critical at the outset of any mobility management planning process. Engaging stakeholders helps increase and diversify support for mobility management programs.

### *Promote Services to the Community*

Successful mobility management practices market services to the community through a variety of methods. In addition, successful practices effectively communicate program outcomes to current and future funders and other stakeholders in a clear and concise

*Successful mobility management practices form partnerships with key stakeholders, promote their services to the community, and lead or participate in coordinated transportation planning efforts.*

#### **Example from the Field**

- The Eastern Connecticut Transportation Consortium, Inc. (ECTC) Mobility Information Specialist frequently visits senior centers, veterans coffee houses, social service agencies, non-profit organizations, disability services organizations, community events, employment related service providers, and other community service agencies.

manner. Methods to promote services and to communicate program outcomes include:

- Resource guides
- Program websites
- Presentations to community groups
- Attendance at community events
- Human interest stories
- Newsletters
- Annual reports

### **Example from the Field**

- The Foothills Area Mobility System in Virginia raises awareness of their mobility management services by promoting human interest stories about their impact, and shares these stories with funders and the public.

### ***Lead or Participate in Transportation Planning Activities and Efforts***

Successful mobility management practices lead or are heavily involved in coordinated public transit-human services transportation planning efforts that include:

- Hosting and facilitating coordinated planning meetings
- Maintaining inventories of transportation resources in their communities
- Providing input into priorities to be included in coordinated public transit-human service transportation plans
- Participating in or leading ongoing committees that meet to discuss transportation needs and coordination opportunities

Mobility managers should also be involved in other planning efforts, to include:

- State transportation planning efforts. For example New York has a State Transportation Plan, a State Bicycle and Pedestrian Plan, and other state-level planning efforts.

- In areas with a Metropolitan Planning Organization (MPO), participation in the development of Metropolitan Transportation or Long Range Transportation plans.
- Transportation planning in rural areas, typically through county and regional agencies and involving local officials. Some states have established regional planning structures that encompass rural areas. For instance, in Connecticut there are Regional Planning Organizations (RPOs) that have been established by statute, and in Virginia there are Planning District Commissions (PDC) established by code.
- Transit development or service plans, a process undertaken on a periodic basis by transit systems in small urban and rural. This planning process involves public outreach, providing mobility managers the opportunity to offer input on unmet transportation needs and on potential transit service improvements. This involvement is particularly important when mobility management programs are not housed within a local transit system.

### **Tip**

The NCMM offers a variety of resources for cultivating partnerships with key community stakeholders and facilitating coordinated transportation planning meetings.

Available at  
<https://nationalcenterformobilitymanagement.org/>

### Stakeholder Checklist

Representatives from the following types of organizations will help increase and diversify support for mobility management programs.

<b>Transportation Providers</b>	<input type="checkbox"/> Public transit providers <input type="checkbox"/> Private transportation providers <input type="checkbox"/> Tribal transit providers
<b>Planning Agencies</b>	<input type="checkbox"/> County and other local planning departments <input type="checkbox"/> Regional planning agencies <input type="checkbox"/> State-level agencies
<b>Passengers and Advocates</b>	<input type="checkbox"/> Existing and potential customers, particularly targeted populations (individuals with disabilities, older adults, veterans, and people with lower incomes) <input type="checkbox"/> Advocacy organizations such as centers for independent living and transportation rider groups <input type="checkbox"/> Volunteer groups, community organizations, and foundations <input type="checkbox"/> Tribes, faith based groups, and organizations representing ethnic groups
<b>Human Service Partners</b>	<input type="checkbox"/> Agencies that administer health, aging, housing, employment, or other support programs for targeted populations <input type="checkbox"/> Human service organizations that serve targeted populations <input type="checkbox"/> Job training and placement agencies <input type="checkbox"/> Housing agencies <input type="checkbox"/> Food banks
<b>Healthcare Providers</b>	<input type="checkbox"/> Hospitals <input type="checkbox"/> Healthcare centers <input type="checkbox"/> Doctor's offices <input type="checkbox"/> Dialysis treatment centers
<b>Private Industry</b>	<input type="checkbox"/> Employers <input type="checkbox"/> Developers of new retail, residential, and educational facilities
<b>Educational Institutions</b>	<input type="checkbox"/> Colleges <input type="checkbox"/> Universities <input type="checkbox"/> Child care providers <input type="checkbox"/> Local education departments/school districts

## Section 3: Needs Assessment and Program Design

Coupled with community outreach, successful mobility management practices are sensitive to local and regional transportation needs, and build their program around these needs. There is a strong emphasis on listening to their local community, conducting ongoing needs assessments, and designing services and programs to fit the identified needs.

### *Determine Community Needs*

A variety of tools are used to determine community needs, these include:

- Surveys
- Community workshops and meetings
- Individual discussions with key stakeholders

The Resources section of this guide provides a sample survey and a link to other tools for obtaining community input on unmet transportation needs.

### *Design Services to Meet Community Needs*

Successful mobility management practices explore a variety of mobility management functions and transportation services to meet identified needs. While each community must develop consensus on preferred services, potential functions and responsibilities for a mobility management program include the following options. It should be noted that many possible functions are interrelated. For example, maintaining an inventory of transportation

*Successful mobility management practices conduct ongoing needs assessments, whether formal or informal, to determine community needs. Then the mobility management programs design their services to meet those community needs.*

services and providers would be components of both coordination and marketing efforts.

### **Serve as a Central Point of Contact for Expanded Community Outreach**

A key function of many mobility management practices is serving as a central repository of available transportation services. This function can take on a variety of roles. The program could simply serve as the contact for agencies working with people with transportation challenges, or it could serve as a one-call center for the general public.

### **Helpful Resource**

The NCMM provides a “One Call-One Click Transportation Services Toolkit” that can be used to determine if this type of mobility management practice is appropriate for a community.

Available at  
<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=2429&z=101>

## **Facilitate Planning Efforts to Implement New and Expanded Services that Respond to Transportation Gaps and Needs in the Community**

Through community outreach efforts local stakeholders help to identify unmet transportation needs, as well as opportunities to expand programs that are helping to meet transportation challenges. A function of a mobility management program can be to facilitate planning efforts for new services, or to identify new opportunities that support existing programs. In line with the mobility management approach that embraces a wide variety of transportation options, these programs extend beyond local general public transit to include consideration of broader regional services, volunteer driver programs, and vehicle repair programs.

## **Build Capacity for Transportation Coordination**

Another typical function of a mobility management program is to coordinate existing transportation services and resources. Often tied in with coordinated public transit-human services transportation planning, these efforts can help to more fully utilize the basic building blocks of coordination in efforts to improve and expand transportation options while using available resources. Steps in this process involve:

- Conducting an inventory of existing transportation services
- Identifying potential partners in coordinating services
- Identifying and prioritizing community needs

- Identifying available strategies for coordinating services
- Identifying funding sources
- Establishing goals and performance measures for coordination activities

Possible future mobility management functions related to these efforts could include facilitating shared scheduling. In

### **Example from the Field**

The Arc of Schuyler in Western New York State responded to a community need to coordinate transportation efforts and non-emergency medical transportation rides in 2010 by hiring a mobility manager. Their mobility manager assisted with the startup of transit in the county, and the mobility management program grew into a one-call center -- coordinating transit, volunteer transportation, and a vehicle operated by the Office for the Aging. The Arc of Schuyler mobility management practice has also grown into a regional effort, with the mobility manager now working with a neighboring county to assist with various projects to improve transportation in that region.

these mobility management models, organizations remain autonomous. However, through the use of joint scheduling software, trips can be viewed and scheduled holistically. Other efforts could include assisting transportation providers with cost allocation considerations that would in turn potentially help with sharing trips and services.



## **Provide Travel Training Services**

Travel training or travel instruction provides people with disabilities the skills required to travel safely on public transportation. Mobility management practices can provide these services directly, or help to facilitate efforts in a community to ensure travel training or travel instruction is available.

### **Helpful Resources**

A multitude of resources are available in designing travel training services program, particularly through the National Aging and Disability Transportation Center at [www.nadtc.org](http://www.nadtc.org).

- The Association of Travel Instruction (ATI) is an organization founded to promote travel instruction for individuals with disabilities and seniors, and to offer educational and professional development to practitioners of travel instruction. Email at [info@travelinstruction.org](mailto:info@travelinstruction.org). (<http://www.travelinstruction.org>)
- Travel Training for Older Adults Part II: Research Report and Case Studies, by the Transportation Research Board's Transit Cooperative Research Program (Report 168), offers best practices and examples of success travel training programs.

Available at <https://www.nap.edu/read/22298/chapter/4>

## **Participate in Land Use Issues**

Land use greatly impacts the provision of transportation services and access to these services. Often, planning for new developments, shopping centers, and medical facilities do not take into account the transportation needs of those that will need or want transportation beyond an automobile. Disconnected land use and development limits transportation options as the distance expands between where people live, work, and shop. A mobility management program can provide input or help to facilitate discussions on land use that affect provision of mobility in their community.

### **Monitor and Facilitate Implementation of Shared-Use Mobility**

The Shared-Use Mobility Center defines shared-use mobility as a term used to describe transportation services that are shared among users, including public transit, taxis and limos, bike-sharing, car-sharing (round-trip, one-way, and personal vehicle sharing), ride-sharing (carpooling, van-pooling), ride-sourcing/ride-splitting, scooter sharing, shuttle services, neighborhood jitneys, and commercial delivery vehicles providing flexible goods movement. While the primary focus has been on shared-use mobility in urban areas, there is now greater focus on how these efforts can be utilized in rural areas. For instance, rural transportation efforts using transportation network company (TNC) models are being planned and implemented. Monitoring and employing these efforts could be a component of a mobility management program.



## **Coordinate with Emergency Medical Services Staff on Emergency Response Efforts**

In light of recent natural disasters and other events local communities, states and the federal government are constantly reassessing plans and responses to emergencies. Transportation is a critical component of these efforts, particularly for non-drivers and people who need mobility assistance during an emergency situation.

Emergency response plans typically include an inventory of available vehicles and transportation resources, and the response to emergencies requires significant coordination between various agencies, transportation providers, hospitals, etc. While hopefully your community never experiences a situation that requires emergency transportation, one of the potential functions of a mobility management practice could be to coordinate with EMS staff as needed during emergencies.

### **Helpful Resource**

One resource for planning and implementing this mobility management function is the Transit Cooperative Research Program (TCRP) *Report 150: Communication with Vulnerable Populations: A Transportation and Emergency Management Toolkit*.

Available at  
<http://www.apta.com/resources/tcrp>

## ***Conduct a Comprehensive and Ongoing Community Needs Assessment***

Successful mobility management practices conduct ongoing assessments of transportation needs in their community so they can effectively respond to changes and modify their programs accordingly.

Similar to determining community needs the ongoing methods include surveys, outreach efforts, and discussions with key stakeholders.

## ***Defining Mobility Management Goals and Activities***

Planning for mobility management functions is greatly impacted by the service area (i.e. city, county, multi-county). In Ohio there is an effort to take this reality into account by better defining short and term program goals and mobility management activities:

- Short term activities center around individualized services, such as working with customers on trip planning services, performing outreach and education about available transportation services, and providing transportation information and referral services.
- Long term activities include working with various organizations to establish formal agreements to coordinate transportation, participating in work groups or coalitions to educate the community on transportation services and needs, planning for new services to community needs, and identifying and implanting new technologies.

## More Examples from the Field

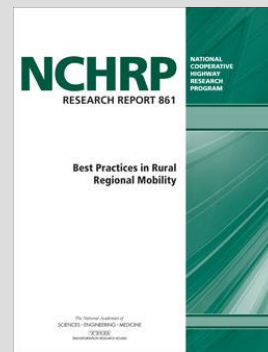
- When the Southwestern Wisconsin Community Action's LIFT program began, its purpose was to provide transportation information and referrals. However, the consortium guiding LIFT realized that the community needed more transportation services than were available. In response to the growing demand they added a volunteer driver program.
- The importance of conducting a full inventory of available transportation options and identifying community assets is critical for designing a rural mobility management program. Shiawassee Area Transportation Agency (SATA) in Michigan identified options beyond public transit services provided by their organization. These community assets included intercity bus services, commuter services, train service, a local airport, transportation provided through places of worship, and neighbors willing to help others.
- The Volunteer Transportation Center (VTC) in Watertown, NY provides essential rides to health, social, and other destinations for residents in a rural three county area who have no other transportation alternatives. In 2016 VTC provided 134,441 trips, driving almost 5.5 million miles, and using 222,665 total hours of volunteers driving. More information on the VTC. Available at <https://volunteertransportationcenter.org/>

## Helpful Resource

A recent NCHRP product, Research Report 86: Best Practices in Rural Regional Mobility provides lessons learned on how to address needs for rural regional mobility, and includes a checklist for developing a rural regional route.

Available at

<http://www.trb.org/NCHRP/Blurbs/176823.aspx>



## Section 4: Program Evaluation and Assessment

Monitoring and evaluation are important considerations for any mobility management program, especially as funding continues to be constrained for transportation projects and services. Successful mobility management practices assess the effectiveness of the program, make modifications as needed, and report outcomes to partners and current and potential funders.

Overall considerations for this process include:

- Assessing current conditions by identifying the level of awareness and information that customers and agency staff have about transportation services. This will help to identify the most critical issues around which marketing efforts should be focused and provide a baseline to measure effectiveness of the mobility management program. Typically, this assessment is conducted through a survey or discussions with partner agency staff to discuss their knowledge base and where they think assistance is needed.
- Through additional outreach and marketing, it is anticipated that the program involvement will increase over time. It will be important to clearly demonstrate these results, particularly showing that more people are using available transportation services to access jobs, shopping, and community locations that otherwise they would not be able to reach.
- Linking the mobility management program to real life situations through

*Successful mobility management practices employ evaluation and assessment tools. They track program outcomes using qualitative and quantitative performance measures with established goals and objectives.*

### Tip

The NCMM provides various resources to assist with measuring the impact of mobility management services, including a brief that lays out a process for developing a performance measurement strategy.

Available at  
<https://nationalcenterformobilitymanagement.org/by-topic/by-topic-performance-measurements/>



human interest stories and through the broader impact on the region as part of the “community infrastructure” when discussing the program with local partners.

While the customized approach of mobility management and the implementation of one-call centers specific to a community means that no two programs are exactly alike. It is therefore essential to have specific objectives and performance measures in place. Performance indicators can be used to ensure the program is meeting anticipated outcomes and to effectively communicate results in a clear and concise manner. Performance indicators should be in place that can be used to ensure the program is meeting anticipated outcomes and to effectively communicate the results to current and future funders and stakeholders in a clear and concise manner.

### *Assess and Evaluate Program Outcomes*

In conjunction with ongoing needs assessments, successful mobility management practices establish methods for assessing the outcomes of their programs and communicating to appropriate decision makers and audiences.

Methods include:

- Reviewing and analyzing ridership, call volumes, program sign-ups, and other data
- Customer and community surveys
- Obtaining input from key community stakeholders

### *Use Quantitative Performance Measures*

Successful mobility management practices establish methods for assessing the performance of their program that involve quantitative measures, in part because the benefits and outcomes of the program will need to be conveyed to different audiences. Some stakeholders will want to see numbers related to transportation services provided through the practice, such as ridership reports and cost data.

### *Use Qualitative Performance Measures*

Assessing the performance of a mobility management program involves both qualitative and quantitative measures, in part because the benefits and outcomes of the program will need to be conveyed to different audiences. Some people will want to see numbers and data, especially since the one-call center will be connected to transportation services that need to report ridership and cost data. Other stakeholders will be interested in the impact of the one-call center on individuals in the community, and will want stories and anecdotes that paint the picture of people who are directly benefitting from the call center efforts. Therefore the use of both qualitative and quantitative performance measures to provide a comprehensive picture of the program’s success is important.

When assessing overall benefits of the mobility management program, the following should be considered:

- **Direct user benefits** - Direct benefits from the one-call center for users through increased access to jobs, services and activities (i.e.,

medical services, employment, education facilities, shopping)

- **Cost efficiencies through support for public services** - Support for agency activities through a mobility management practice that help to reduce costs by:
  - Allowing access to medical services and therefore avoiding more acute and expensive medical problems
  - Helping reduce welfare dependency and unemployment
  - Providing the ability to live independently and therefore reducing care facility costs
- **Economic benefits** - Increases economic and social opportunities for people who may be economically, physically and socially disadvantaged.
- **Option value benefits** - An integral part of the community infrastructure.

### Helpful Resource

APTA's report *Public Transit's Impact on Rural and Small Towns*, examines current trends to reveal the increasingly critical connection between public transit and rural communities and small towns. This paper also looks at rural public transit cost efficiency, and describes successful examples of smaller community public transit programs.

Available at  
<https://www.apta.com/resources/reportsandpublications/Documents/APTA-Rural-Transit-2017.pdf>

### Examples from the Field

- The Shiawassee Area Transportation Agency's mobility manager reported an average 20 percent increase in ridership each month since the Transportation Solutions Division's mobility management program was implemented. In addition to tracking the number of rides, she can also report the trip purpose and whether the trips were in or out of the county.
- The Eastern Connecticut Transportation Consortium monitors mobility management practice outcomes by tracking program sign-ups, vouchers ordered, and rides taken. This data and information is then used to contract transportation for small rural towns in the region.

- Assess outcomes through Connection to Established Goals and Objectives – The FAST Act requires MPOs and State transportation planning efforts to establish performance measures and targets. Tying mobility management efforts to these performance measures will ensure they are included in future federal funding consideration.
- Even if people are not currently using mobility management services they place a value on it for having it available, i.e. a family member suddenly can no longer drive.

Overall, results regarding the program are obtained through these result-oriented questions:

- ✓ How is the service affecting the community?
- ✓ How much of the population is being served?
- ✓ What share of the needs are being met?
- ✓ What are the economic impacts of the service?

### *Assess Outcomes through Connection to Established Goals and Objectives*

Another consideration for evaluating the impact of mobility management efforts is to link this assessment to established goals and objectives. Working with local stakeholders the goals and objectives for mobility management services are developed and updated regularly, and connected to quantitative and qualitative measures for evaluating outcomes.

Adapted from a “*Performance Measures for Public Transit Mobility Management*” report produced by the Texas Transportation Institute (TTI), the following examples provide a guide for this process.

- First, a series of goals and objectives are developed.
- Next, the proposed objectives are connected to possible quantitative and qualitative measures for evaluating mobility management services.





<b>Goals</b>	<b>Objectives</b>
Improve Coordination	<ul style="list-style-type: none"> <li>▪ Continue current partnerships and establish new ones to coordinate transportation services, planning, and expertise.</li> <li>▪ Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</li> </ul>
Focus on the Individual	<p><u>Short-Term</u></p> <ul style="list-style-type: none"> <li>▪ Provide information to the public and human service and other agency staff on transportation service options.</li> <li>▪ Identify and facilitate new services to meet mobility needs.</li> </ul> <p><u>Long-Term</u></p> <ul style="list-style-type: none"> <li>▪ Schedule trips through multiple providers with one phone call.</li> <li>▪ Implement a “one-click” option to the call center that allows customers to access information 24/7.</li> </ul>
Promote Accessibility and Livability	<ul style="list-style-type: none"> <li>▪ Monitor services to ensure they are accessible, lead to livable communities, and improve quality of life.</li> <li>▪ Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</li> </ul>
Diversity in Products and Services	<ul style="list-style-type: none"> <li>▪ Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</li> </ul>
Foster Education and Awareness	<ul style="list-style-type: none"> <li>▪ Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on impact of current transportation services and on the need for new or expanded mobility options.</li> </ul>
Promote Financial Sustainability	<ul style="list-style-type: none"> <li>▪ Leverage funding and resources through partnerships.</li> <li>▪ Build a strong foundation for mobility management programs through funding and resource support.</li> </ul>



Objectives	Possible Performance Measures
<p>Continue current partnerships and establish new ones to coordinate transportation services, planning, and expertise.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Active leadership of local coordinated planning efforts.</li> <li>▪ Improved connectivity between transportation providers to provide more seamless service.</li> <li>▪ Greater customer access to additional transportation services.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in number of connections either between routes, modes, or service providers that maximize the trip-making options available to individuals.</li> <li>▪ Increase in passenger trips on coordinated transportation services.</li> </ul>
<p>Identify opportunities to coordinate service delivery to close gaps or eliminate overlaps.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Integrated service agreements between providers to minimize duplication of service and expand opportunities for customers to transfer between services or access multiple providers.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in number of connections between transportation providers.</li> <li>▪ Increase in number of passenger transfers between service providers.</li> <li>▪ Increase in total passenger trips.</li> </ul>
<p>Provide information to the public and human service and other agency staff on transportation service options.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Public information and transit customer information available in variety of formats, including published in other languages and consistent with Title VI Plans.</li> <li>▪ Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in number of passenger trips on available transportation services.</li> </ul>

Objectives	Possible Performance Measures
<p>Identify and facilitate new services to meet individuals' needs.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in the range of transportation options and service providers available to current and new customers.</li> <li>▪ Expanded opportunity for residents to access key destinations.</li> <li>▪ Increased partnerships with public and private transportation providers.</li> <li>▪ Establishment of new programs to meet unmet transportation needs and fill gaps in current transportation options.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Expanded span of service through new services.</li> <li>▪ Increased service days per week through new services.</li> <li>▪ Increase in total number of trips provided in region as a result of new service.</li> </ul>
<p>Schedule trips through multiple providers with one phone call.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in the range of transportation options and service providers available to current and new customers.</li> <li>▪ Expanded service area to include destinations where individuals need to go.</li> <li>▪ Expanded options for same day service.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in calls to one-stop call center.</li> <li>▪ Increase in total passenger trips on available transportation services.</li> </ul>
<p>Implement a “one-click” option to the call center that allows customers to access information 24/7.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Effective website that provides access to information.</li> <li>▪ Greater use of social media and other efforts to ensure knowledge of one-click option.</li> <li>▪ Increase in the range of transportation options and service providers available to current and new customers.</li> </ul>

Objectives	Possible Performance Measures
<p>Implement a “one-click” option to the call center that allows customers to access information 24/7 (continued).</p>	<ul style="list-style-type: none"> <li>▪ Expanded service area to include destinations where individuals need to go.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in website hits.</li> <li>▪ Increase in total passenger trips on available transportation services.</li> </ul>
<p>Monitor services to ensure they are accessible, lead to livable communities and improve quality of life.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in travel training services for older adults, individuals with disabilities, children, and youth.</li> <li>▪ Increase in the range of transportation options and service providers available to current and new customers.</li> <li>▪ Expanded service area to include destinations where individuals need to go for retail, health, and other services.</li> <li>▪ Increased options for same day service.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increased number of trips on available transportation services.</li> </ul>
<p>Consider the effect of land use design and development on the provision of transportation mobility and accessibility.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Cooperative land use planning that includes transportation providers in the location of health and human service facilities, shopping centers, housing complexes, and other development that impacts need for expanded mobility options.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Number of Memorandums of Understanding between providers and communities on land use involvement or design.</li> </ul>

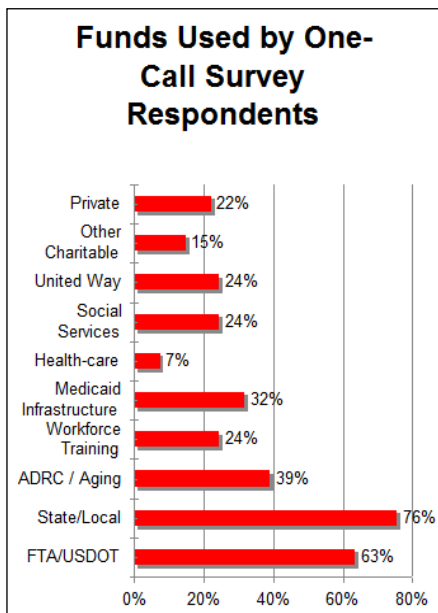
Objectives	Possible Performance Measures
<p>Ensure meaningful access to transportation service for older adults, people with disabilities, children and youth, individuals with lower incomes, and people with language barriers.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Assessment of individual needs for specific target markets based on research and community outreach.</li> <li>▪ Approved service plans that are responsive to individual needs identified in the assessment.</li> <li>▪ Increase in the range of transportation options and service providers available to current and new customers.</li> <li>▪ Services provided to ensure access for specific target markets.</li> <li>▪ Expanded transit service area to include destinations where individuals need to go for retail, health, and other services.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in percent of households within ¾ mile of fixed route or flexible route transit in census blocks reflecting concentrations of target markets.</li> <li>▪ Expanded demand response transit service level (miles, hours) per capita in U.S. Census blocks (not served by fixed route or flexible route transit) reflecting concentrations of target markets.</li> <li>▪ Increase in passenger trips on services in targeted market areas.</li> </ul>
<p>Educate health and human agency staff, workforce agency staff, policymakers, elected officials, and other stakeholders on impact of current transportation services and on the need for new and expanded mobility options.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Targeted marketing campaigns to promote mobility management services and need for mobility options.</li> <li>▪ Coordination with transportation providers on branding and marketing campaigns.</li> </ul>

Objectives	Possible Performance Measures
	<p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Number of presentations to agencies.</li> <li>▪ Number of community events attended.</li> <li>▪ Support for mobility management and variety of transportation options based on public opinion surveys.</li> </ul>
<p>Leverage limited funding and resources through partnerships.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Initiatives to encourage local government investment in transit programs.</li> <li>▪ Shared funding agreements between agencies and/or stakeholders for new service implementation.</li> <li>▪ Applications for new sources of funding.</li> <li>▪ Partnerships with private industry for funding support.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in funding sources and amounts to support mobility management activities.</li> <li>▪ Increase in funding as compared to previous year.</li> <li>▪ Increase in local funding or through sources other than federal and state funds.</li> </ul>
<p>Build a strong foundation for mobility management programs through funding and resource support.</p>	<p><u>Qualitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Education programs provided to stakeholders, including elected officials, community organizations, health and human service agencies, and workforce programs.</li> </ul> <p><u>Quantitative Measures</u></p> <ul style="list-style-type: none"> <li>▪ Increase in stakeholder involvement in regional coordinated planning efforts.</li> <li>▪ Increase in number of purchase of service agreements.</li> </ul>

## Section 5: Funding

Not surprisingly, funding strategies are the backbone for supporting mobility management practices. The practices profiled for this guide used federal sources, along with other state and local support. They built their programs incrementally using what was available and growing from their successes.

Mobility management programs across the country are funded through a variety of sources. A survey conducted by the Community Transportation Association of America (CTAA) provided a look at how services are funded, specifically for one-call transportation centers that are often the focus a mobility management program. The results indicated that a wide range of funding sources was being used.



Source: CTAA Guide to Beginning ONE CALL-ONE CLICK Transportation Services.

*Successful mobility management uses federal transit funding sources while exploring other funding opportunities, build their programs incrementally using available resources, and utilize volunteers and in-kind supports.*

### Use Federal Transit Funding Sources

Successful mobility management practices effectively use federal funding to initiate and support services and programs. FTA's Section 5310 and Section 5311 funds are typically the catalyst or foundation for a successful mobility management practice. These programs are typically administered at the state level by the department of transportation, therefore prospective mobility management practices should contact their respective state agency for more information if not already knowledgeable of these programs and the

#### Tip

Need to learn more about the federal programs that support transit and mobility services? Facts sheets and more information on these programs are available through the FTA website at <https://www.transit.dot.gov/grants>

### Examples from the Field

- Foothills Area Mobility System (FAMS) started their call center using Google Voice, a free call transferring data tracking system, and grew through securing grants from the Federal Transit Administration (FTA), then adding a Veterans Transportation Community Living Initiative (VTCLI) grant and funding from the Virginia Department for Aging and Rehabilitative Services.
- Lake Transit in California uses farebox revenue, FTA funds, Local Transportation Funds (LTF) and State Transit Assistance Funds (STA) to support rural routes. LTFs are generated in California from a ¼ cent sales tax, with the amount based on sales tax collected in the county. These funds are used for a variety of purposes in addition to the allocation provided to Lake County Transit. STA funds are provided through the state from statewide fuel excise taxes.

application process.

### Explore Other Funding Opportunities

Beyond FTA programs successful mobility management practices explore other funding opportunities to sustain and grow their program. Examples include:

- Federal opportunities as they occur, such as the Veterans Transportation Community Living Initiative (VTCLI) grants

- State-level programs that support human services transportation
- Local government funding
- As appropriate, passenger fares
- Donations and sponsorships

### Helpful Resource

More information on funding opportunities beyond federal sources is available through the NCMC.

Available at:

<http://nationalcenterformobilitymanagement.org/by-topic/by-topic-funding>

### Build Their Program Incrementally Using Available Funding Resources

Successful mobility management programs typically obtain funding to initiate and sustain mobility management practices on an incremental basis. Therefore they recommend:

- Developing funding for services one step at a time
- Building operations as funding is obtained
- Showing the value of services, in terms of quality of life or livability measures and/or how the services are enabling greater access to community resources more efficiently



- Talking with partners and state staff from the departments of transportation, health and human services, housing or other departments to learn what options exist for funding both the interim activities and the actual services

### *Use Volunteers and In-kind Support*

Limited transportation dollars can be stretched to serve many more trips through the use of volunteer drivers and/or office staff.

Volunteers can be an ongoing source of support as well as start-up support while the program is incrementally being built.



## Section 6: Planning Considerations

When initiating a mobility management practice there are a variety of additional considerations, either interrelated or beyond those discussed in previous sections. At the outset of a planning effort it is important to convene key stakeholders and begin discussions on the following important topics.

### *Guiding Principles*

Guiding principles are especially useful when local stakeholders are working together on a shared vision going forward. Through discussions with the group consistent themes are hopefully identified that can then serve to guide the planning and implementation of a mobility management practice. Guiding principles may involve:

- A long term commitment to any mobility management program, i.e. sustainable funding will need to be identified.
- Individual stakeholders have their own issues related to transportation, so an overall broader mobility management program needs to take this into account and should not lose sight of an agency's specific needs.
- There should be a way to demonstrate how the mobility management program will be cost effective.

### *Organizational Structure*

A vital component in the operation of a mobility management program is identifying a lead agency with the availability, willingness, and organizational structure to manage and oversee the program. A variety

of entities can be the lead agency, and no one institutional home or organizational model has been identified as being required to achieve success. Across the country a variety of organizational arrangements can be found leading mobility management efforts, including:

- Non-profit agencies (either as a function within a multi-purpose non-profit agency or as a stand-alone agency),
- Public transit agencies,
- Local or county governments, or
- Regional planning agencies.

Often an agency and organization is already championing mobility management efforts in a community, and then logically would continue to lead planning efforts. However, initial discussions should verify that this organization is willing to maintain this role, and other stakeholders support this arrangement.

At some point in the implementation of the mobility management program there may be the transition of the program to a transportation provider -- or another appropriate entity for actual operations of the program. A new, fully neutral entity may need to be considered.

### **Example from the Field**

Opportunity Link (OL) is a non-profit organization in North Central Montana, committed to assisting eleven counties and three reservations in achieving and sustain independence, prosperity and a better way of life.

Opportunity Link recognized the need for a transportation service to connect people living in this region with services in Havre and Great Falls, and enlisted the Western Transportation Institute (WTI) at Montana State University-Bozeman to develop a plan for implementing public transportation in the region.

WTI's research team combined stakeholder's resources through community meetings with tribal and county officials. They included representatives of communities and areas to be covered by the transit service and formed a Transportation Advisory Committee (TAC) consisting of elected officials, representatives from senior centers, transportation agencies, medical facilities and educational facilities, social service providers, and community based and minority advocacy organizations. The TAC also included representatives from the Fort Belknap and Rocky Boy tribes. The TAC approved a coordinated transportation plan for their community and started North Central Montana Transit (NCMT). In addition to state and federal funding, local partners including Blaine and Hill Counties, Northern Montana Hospital in Havre, and local organizations help to support the service.

### **Stakeholder Role**

An important element of a mobility management program is maintaining a role for local stakeholders, particularly those that have been involved in the initial planning process. These stakeholders, who represent various community agencies, can serve on an advisory committee that would help guide implementation of the program, offer input on current services and possible improvements, provide guidance on development of new programs, investigate future funding opportunities, and foster stakeholder relationships to help market the program's services. Therefore, a key part of planning a mobility management practice is determining:

- How current stakeholder organizations fit within this structure,
- What current responsibilities stakeholders would be willing to give up through mobility management activities as long as the transportation needs of their customers were met, and
- How each stakeholder would have an appropriate voice in administration and operation of the program.

One consideration is that local stakeholders would serve on an advisory committee for the program. This committee would offer input on: current services and possible improvements; guidance on development of new programs; future funding opportunities, and marketing the program's services to their customers and the public.

### **Formal Agreements**

Through the implementation of a mobility management program specific partnerships

may be formed between the lead agency and individual stakeholder organizations, a formal Memorandum of Understanding (MOU) or similar document may be needed. This agreement would include information on how partners will work together and detail their roles of responsibilities. The accord should include:

- A description of each partner agency
- The purpose of the MOU or agreement
- A description of the agreed upon roles and responsibilities of each organization, what each agency will be providing to ensure project success, and how the roles and responsibilities align with project goals, objectives and target outputs
- Agreed upon policies and procedures
- Information on the resources any partner would contribute to the project (i.e. time commitment, in-kind contributions, or grant funds)

### **Helpful Resource**

A sample MOU is provided in the Resources section of this guide. This example is for three agencies working together on a one-call center, but can be easily modified for partnerships on other mobility management practices.

## **Staffing**

Staffing is an important component in the planning of any mobility management

practice. There are typically two components related to staffing:

1. Initial planning and administrative responsibilities.
2. Later operations of the program.

### **Planning/Administration**

While there may be agreement between local stakeholders on the need for a mobility management program, there will need to be a dedicated position to plan and administer the effort. In conjunction with the agency to lead future efforts an appropriate mobility manager position dedicated to implementation of the program would be needed.

### **Program Operations**

The staffing plan for operating the mobility management practice will ultimately be determined by program functions and funding availability. However, it will need to consider:

- Operating hours for the program
- Staffing beyond these hours, with appropriate back-up staffing, to fill in during hours and days when core staff is not available
- Level of outreach to the community that will be an integral component of overall mobility management functions to ensure people in the community are aware of the program
- Level of involvement in various mobility management services.

### **Helpful Resource**

The NCMM website provides a variety of model mobility manager job descriptions that can be considered.

Available at  
<https://nationalcenterformobilitymanagement.org/for-mobility-managers/job-descriptions/>.

### ***Marketing and Launching***

Marketing and branding of a mobility management program is vital to ensure people in the community know it is available as a resource, and potential funders and decision makers are aware of the impact it has in the community. Opportunities to evaluate and broadcast the importance of the program are discussed further in the following Monitoring and Evaluation section.

Branding of the mobility management program, especially if it ultimately includes a one-call center, will provide the opportunity for stakeholders to consult on a formal name. Allowing the community to have involvement in the naming will help to ensure engagement and awareness of the program from the outset.

### ***Technology/IT Support***

Depending on preferred functions for the mobility management program, a variety of technologies will need to be considered. Needs in rural and small urban areas can vary greatly from those in larger urban areas, and these needs must be balanced with affordability. It is important to know exactly

what is to be achieved when implementing technology, and making sure that it is reflected in any procurement process.

As specified by CTAA, “scalability” and “interoperability” are also important considerations when evaluating technologies for a mobility management program, especially those with a one-call function. Scalability refers to the ability to easily increase the number of users of a particular technology. Interoperability refers to the ability of different technologies to work together or “talk” to one another. Technology components for a mobility management program will need to be taken into account and considered as part of the planning process.



## Section 7: Program Profiles


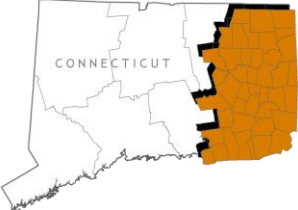

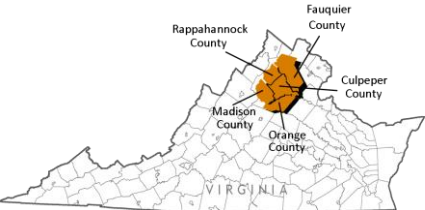



As noted in the Introduction, research for this guide provided information on over 100 mobility management efforts from across the country. Practices were assessed by the following six criteria or characteristics:

1. **Innovation:** A practice is new or adapted or applied in a different or unique way.
2. **Knowledge base:** Information about the context and setting in which the practice is implemented is clearly defined. The resources needed and conditions under which the mobility management practice is implemented are explained. The goals, implementation strategies, process and outcome measures related to why the practice is implemented are clearly articulated.
3. **Stakeholder engagement:** The practice is informed by a diverse group of key stakeholders – that are especially relevant and important to the mobility management system.
4. **Monitoring and evaluation:** Procedures are in place to continuously assess the practice.
5. **Efficiency:** Are the fiscal, personnel, and other resources required to implement the strategy, reasonable considering the impact of the strategy, and in relation to the availability of all resources.
6. **Impact:** The extent to which a strategy has the desired or intended effect on a mobility management need, problem, or issue over time.

### Tip

In addition to the mobility management practices profiled in this section, the Resources section includes descriptions of additional programs from across the country. Grouped by regions, these descriptions may offer more ideas for implementing or expanding a mobility management effort.

From the overall group seven mobility management practices were selected to be profiled, and are listed on the next page and detailed in this section. They represent a variety of mobility management efforts, as well as different regions of the country. Each profile discusses the services provided through the practice, program origins, program partners, funding, and program highlights. Importantly, each profile provides the perspective of mobility management staff, their recommendations when considering and replicating a similar effort, and overall lessons learned. Contact information for each mobility management profile is provided so that they can be reached directly for additional guidance.

<p><b>Door-Tran Inc.;</b> <b>Sturgeon Bay, Wisconsin</b></p>	
<p><b>Eastern Connecticut Transportation Consortium, Inc.;</b> Norwich, Connecticut</p>	
<p><b>Ithaca Tompkins County Transportation Council/</b> Way2Go; Ithaca, New York</p>	
<p><b>Rappahannock-Rapidan Regional Commission;</b> Culpeper, Virginia</p>	
<p><b>Senior Citizens of Kodiak, Inc.;</b> Kodiak Island, Alaska</p>	
<p><b>Shiawassee Area Transportation Agency;</b> Owosso, Michigan</p>	
<p><b>Southwestern Wisconsin Community Action Program, Inc.;</b> Dodgeville, Wisconsin</p>	



# Door-Tran Inc.

**Organization:** Door-Tran Inc.  
**Service Area:** Door County, WI  
**Address:** 1009 Egg Harbor Road  
Sturgeon Bay WI 54235  
**Phone:** 920-743-9999  
**Website:** www.door-tran.org  
**Contact:** Pam Busch, Mobility Manager  
**Email:** info@door-tran.org



## General Program Information

Door-Tran offers many different types of mobility management services to Door County residents who need assistance navigating available transportation services. Coordinating with government, non-profit, and for-profit providers and other organizations on an ongoing basis, Door-Tran provides:

- information and referral,
- volunteer transportation,
- half-price travel and fuel vouchers, and
- a vehicle repair and purchase loan program.

Door-Tran provides information on all transportation providers in Door County by phone, brochure and website. Coordination goes beyond their county , by staff participation in regional, state, and national organizations.

Door-Tran staff also advocates for Door 2 Door Rides, Door County's public transit system. Door 2 Door Rides is a shared ride taxi cab and bus connector system serving Door County residents. The shared ride Door 2 Door Rides taxi service is available Monday through Friday 6:00 a.m. to 10:00 p.m., Saturdays from 7:00 a.m. to 10:00 p.m. and Sunday 7:00 a.m. to 6:00 p.m. Door 2 Door Rides also runs scheduled connector buses county wide, including routes to and from Egg Harbor, Valmy, Sister Bay, Baileys Harbor, Algoma, and Brussels. Connector vehicles will travel up to ½ a mile off the planned route with advanced notice. The Door 2 Door Rides connector service is offered Monday through Friday from 7:00 a.m. to 7:00 p.m.

## Mobility Management Services

Backed by the Door County Transportation Consortium a coalition of community partners, Door-Tran has been able to initiate and maintain several mobility management services to meet transportation needs in the community. They provide transportation information and referral to the public by phone, in person, on-line and through their Transportation Resource Guide which

is updated annually. Door-Tran staff also provides monthly workshops and presents to groups throughout Door County to help connect customers with transportation services.

In 2008, Door-Tran implemented a half-price travel voucher program to cut the costs in half for low-income residents of Door County. By enrolling in the voucher program and purchasing booklets of vouchers, customers can use a private taxi, Washington Island Community Van, or Ferry at a subsidized cost.

Additional mobility services include:

- Working with Door County to implement and run Door 2 Door Rides—the door-to-door public shared ride taxi system.
- Implementing and maintaining a Veteran Volunteer Transportation Program to assist veterans in accessing medical appointments at Veterans Health Administration medical facilities located outside the county.
- Implementing and maintaining a County Wide Volunteer Transportation Program to serve individuals who have no other options.
- Initiating a Vehicle Purchase/Repair Loan Program in 2014. The vehicle loan program provides low-income families with 0% interest vehicle loans to get to and from work.
- Implementing a Half-Price Gas Voucher Program to assist with fuel costs for employment or job search trips in 2015.
- Launching a vehicle repair grant program in 2017 to assist unemployed people with private funding.

## **Program Origins/Background**

The United Way of Door County identified transportation services at the highest need for county residents in their 1998 and 2005 needs assessments, and also in a 2006 focus group. In 2007, the Door County Community Foundation put out a request for applications for its Community Impact Grant. The Door County Community Foundation was looking for creative cross-disciplinary projects that would have significant and positive impacts.

The United Way applied for and received a Community Impact Grant and formed a transportation steering committee comprised of nonprofits, for-profits, and government agencies. The steering committee found that while there were lots of vehicles and drivers in the county, the agencies were not adequately communicating and coordinating with each other. As a result, the Door County Transportation Consortium was formed in 2007 and set up a communication and coordination center. The center acted as a one-call-center to help Door County residents schedule rides on existing services. The center staff also tracked unmet needs

by recording ride requests that were not filled and coordinating with University of Wisconsin-Green Bay students to conduct a resident transportation needs survey.

Eventually, based on this research, Door-Tran was formed to make transportation more affordable, available, and accessible.

## **Program Partners**

Door-Tran's staff works with a variety of partners on their mobility management efforts. The Door County Transportation Consortium has over 30 member organizations as of August 2017:

- Anytime Ride LLC
- Abby Vans
- ADRC of Door County
- Choice Mobility
- City of Sturgeon Bay
- Division of Vocational Rehabilitation
- Door County Cab
- Door County Community Foundation
- Door County Human Services
- Door County Job Center
- Door County Medical Center
- Door County Planning Department
- Door County Senior Resource Center
- Door County Veteran's Services
- Door County YMCA
- HELP of Door County
- Jimbo's Express & Shuttle
- Lakeshore CAP
- Larson & Associates
- League of Women Voters
- Ministry Memory Clinic Door County
- Neighbor to Neighbor
- Northeast Wisconsin Technical College
- Private Citizens
- Scandia Village-Good Samaritan Society
- Senior Services Advisory Committee
- Sunshine House Inc.
- Sustain Door
- United Way of Door County
- Washington Island Community Health Program
- We are HOPE Inc.

Door-Tran coordinates the Door County Transportation Consortium through monthly email updates and annual meetings. There are no membership fees to join the consortium.

In addition to local partners, state and national agencies were also instrumental in supporting the foundation and continuation of Door-Tran. CTAA and the WisDOT staff provided technical assistance and information on funding sources, including how to use Section 5310 grants for mobility management projects. WisDOT staff also assisted Door-Tran staff with technical assistance and securing funding sources to start their voucher and shared ride taxi programs.

## **Program Funding**

As noted earlier Door-Tran began with a grant from the Door County Community Foundation and support from the local United Way. Since then, they have received support from the state, federal government and private organizations. Their primary funding source is Section 5310 Program grant funds.

The mobility managers work together to research and submit grants to support Door-Tran programs, and to date they have received funding from the following agencies and organizations:

- Archibald Douglass Charitable Trust
- Bader Philanthropies
- Door County
- Door County Community Foundation, Inc.
- Easterseals Project Action Consulting
- Greater Green Bay Community Foundation, Inc.
- Green Bay Packer Foundation
- United Way of Door County, Inc.
- Local Service Clubs, Churches, Businesses and Individuals
- Wisconsin Department of Transportation

## **Program Highlights**

Since the Door County Transportation Consortium was formed and began researching transportation needs 2007, they have made many strides towards their mission of making transportation more affordable, available, and accessible. Door-Tran notes the following achievements on its website:

- The half-price travel voucher program subsidized over 32,500 half price rides since its implementation in Nov. 2008.
- Collaborated with the County of Door to begin a public shared ride taxi, Door 2 Door Rides, which is averaging more than 3,400 rides per month. Door-Tran continues to work with the County on service expansions.

- Their Veteran Volunteer Transportation Program has served more than 147 Veterans and provided over 1,388 rides since it began in February 2011.
- Since Door-Tran's County Wide Volunteer Transportation Program began in July 2012, it has already served more than 195 people and has provided over 2,840 trips.
- Within the first year and half of the Vehicle Purchase/Repair Loan Program, they have provided 13 loans.

In 2017, Door County was among ten communities selected to receive the Accessible Transportation Community Initiative (ATCI) grant offered by Easterseals Project Action Consulting. They were awarded up to \$100,000 for 12 to 18 months. This grant will help increase and improve transportation for people with disabilities and older adults. Door-Tran submitted an application for the ATCI grant through a team of representatives from the City of Sturgeon Bay, County of Door, Door-Tran, Northeast Wisconsin Technical College and United Way of Door County. It involves a two day event, using a cross agency approach to develop a plan to strengthen transportation services in Door County, including a system to centralize transportation dispatching among multiple providers.

## **Program Challenges/Lessons Learned**

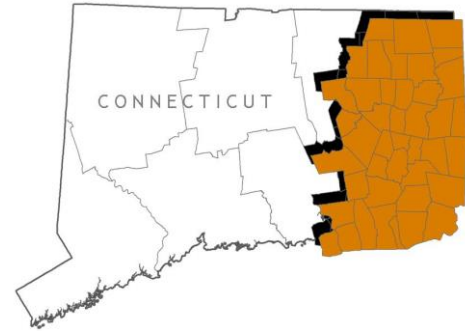
When starting up the shared ride taxi program, the established private taxi providers were concerned with losing their customers. Door-Tran staff found that communication was key to keeping everyone moving forward. The private taxi providers are an important part of Door County's transportation system and provide 24/7 access. Door-Tran staff made sure to keep the private providers involved in the planning process and recognize their contributions and importance. The voucher program helps keep private taxi costs close to the share ride taxi service costs. The private taxi providers found that they could make most of their profits during hours that the shared ride services were not available.

Pam Busch, CWDP & Certified Mobility Manger at Door-Tran shared the following advice:

*Funding and communication and a huge part of our accomplishments to date. It's important to keep all key players around the table even if things get a little rocky.*

# Eastern Connecticut Transportation Consortium

**Organization:** Eastern Connecticut Transportation Consortium  
**Service Area:** Eastern Connecticut  
**Address:** 113 Salem Turnpike, Suite 200  
Norwich, CT 06360  
**Phone:** 860-859-5792  
**Website:** [www.ectcinc.com](http://www.ectcinc.com)  
**Contact:** Laura McElwee,  
Mobility Information Specialist  
**Email:** [ectcmobility@yahoo.com](mailto:ectcmobility@yahoo.com)



## General Program Information

The Eastern Connecticut Transportation Consortium, Inc. (ECTC) is a private non-profit 501(c)3 agency incorporated in 1992. ECTC was formed through a partnership between the Southeastern Connecticut Council of Governments, Frank Loomis Palmer Fund and the Bodenwein Public Benevolent Foundation. The purpose of ECTC is to promote the coordination and consolidation of transportation services for people with low incomes, older adults, and people with disabilities in Eastern Connecticut. ECTC serves 56 towns in Windham County, New London County, and parts of Tolland Counties.

Services provided by ECTC include:

- The Rides for Jobs Program, a free temporary transportation service for qualifying area residents. This program provides:
  - Transportation to employment for 60 days.
  - Transportation to employment-related activities, including interviews and job training.
  - Transportation to daycare for work or educationally related purposes.

Through the Rides for Jobs Program, ECTC coordinates with local case workers to connect people with lower incomes to available transportation options, including local bus service, van service, mileage reimbursement, car based solutions, and taxi services.

- A travel voucher program that provides subsidized transportation for people with disabilities. Eligible residents of eastern Connecticut can use this program as an accessible alternative when transit services are not available.

- Dial-a-ride medical transportation in collaboration with Connecticut Department of Transportation (CTDOT) and twelve municipalities in the region. This program provides brokered transportation for medical appointments, and mileage reimbursement for people who can ride with a friend, neighbor or family member.
- Americans with Disabilities paratransit service, under contract to the Southeast Area Transit District.
- Senior transportation for the towns of Bozrah and Franklin. Destinations include nutrition sites, shopping and medical appointments.
- The Mobility Program that works toward maximizing resources of services such as public transit, senior transportation, volunteers, non-profits and taxi services.

## Mobility Management Services

Through their mobility programs, ECTC partners with the Southeastern Council of Governments, Northeastern Council of Governments, Eastern Connecticut Workforce Investment Board, Windham Region Transit District, Southeast Area Transit, as well as numerous municipalities, taxi, and livery service providers. ECTC's Mobility Program works toward maximizing resources of services such as public transit, senior transportation, volunteers, non-profits and taxi services. The program's emphasis is on:

*"Transportation has always been an issue in Eastern Connecticut due to its rural nature and limited public transit options. ECTC works hard to educate and inform both agencies and consumers about services that are available to them and to look for ways to reduce the gaps in these services."*

-- Laura McElwee, ECTC Mobility Information Specialist

- Meeting consumer needs
- Providing information on local and regional transportation options
- Identifying transit barriers throughout eastern Connecticut
- Looking for ways to create partnerships

ECTC has a Mobility Information Specialist who conducts extensive community outreach and works with individuals and organizations to develop transportation options specific to the needs of individuals. The ECTC Mobility Program developed a mobility guide (detailed in this profile under Program Highlights) which is used by ECTC staff to help people address consumer transportation barriers.



## Program Origins/Background

The ECTC mobility management program builds upon the origins of the organization. Through the initial partnership, the need for a variety of transportation options in the region was identified, along with the need to promote the coordination and consolidation of available services.

## Program Partners

Through their mobility programs, ECTC partners with the Southeastern Council of Governments, Northeastern Council of Governments, Eastern Connecticut Workforce Investment Board, Windham Region Transit District, Southeast Area Transit, as well as numerous municipalities, taxi, and livery service providers.

## Program Funding

ECTC used Federal Transit Administration New Freedom Program funds to initiate their mobility management program. Funding is also provided by CTDOT and through service contracts with several municipalities. ECTC also receives some community grants that are used as a safety net for consumers when services are limited due to funding issues.

## Program Highlights

ECTC developed its first *Getting Around Eastern Connecticut* Transportation Guide in 2012, and updates it annually. This guide details public transit, medical transportation, specialized transportation, and private transportation provided in the region. The *Getting Around Eastern Connecticut* guide is available through the ECTC website. Printed copies are distributed to individuals and organizations serving older adults, veterans, people with disabilities, and lower income residents in eastern Connecticut.

ECTC serves approximately 1,900 individuals through their services each year. The Mobility Program pays particular attention to consumers using ECTC's services, looking to find ways to improve programs to address needs for vulnerable populations and the organizations that serve them. The ECTC Mobility Program staff conducts outreach in the community to identify unmet needs and seeks partnerships and creative solutions using services that already exist or new ideas to be implemented to resolve transportation challenges.

## Program Challenges/Lessons Learned

ECTC's Mobility Information Specialist offered thoughts on their program that could help guide implementing a mobility management practice in a small urban and rural area. These included:

- **Conducting extensive community outreach:** The Mobility Information Specialist visits senior centers, veterans coffee houses, social service agencies, non-profit organizations, disability services organizations, community events, employment related service providers, and other community service agencies. During these visits the Mobility Information Specialist listens to the community speak about transportation barriers that underserved populations face, and about what works and what does not work for these groups. By going to the people and their communities to learn from them, ECTC has created programs that address transportation needs for accessing jobs, medical appointments, and community services.
- **Developing programs to fit community need:** When transportation services are not available mobility management efforts have provided ECTC with the opportunity to develop new programs to meet needs. One example is the Caregiver Transportation Program that reimburses a relative, friend, or volunteer when they transport people to medical appointments.
- **Monitoring services for building partnerships:** ECTC Mobility Program staff pays attention to program sign-ups, vouchers ordered, and rides used, and then use this information to contract transportation for some small rural towns. ECTC works with local paratransit, livery, taxi services, and veteran's transportation services in eastern Connecticut to improve transportation coordination and services. They also work with other non-profits and organizations that help others learn about their services.

One of the primary challenges confronted by this practice is that available transportation services may be short term in nature. Laura McElwee, ECTC's Mobility Information Specialist, shared the following:

*“A challenge in the rural areas -- some of our programs are not long term. The Rides for Jobs programs is for 60 days of employment transportation. The goal is to help people get to a place where they can be self-sufficient in rural areas, but sometimes their best hope is to work with their human resource department to carpool.”*

Working with community partners to improve coordination is an ongoing effort, as are attempts to avoid duplicating transportation services that are already in place and working. ECTC is always willing to recommend services that are in place beyond those provided by their organization if that works best for the customer. These coordination efforts point out how labor intensive one critical trip can be, as described by the Mobility Information Specialist:

*“A recent call came from a rural resident who was number one on a heart transplant list in New Haven and needed transportation, and prompted me to reach out to a couple of civic-minded*

*groups whose mission includes the well-being of the community. The first call I received back was a person from the Lion's Club. The caller said he would provide rides for this heart recipient. The driver and rider will be participating through the Caregiver Mileage Reimbursement Program. The driver will be compensated for his mileage for medical transportation assistance through this program. This is an example of gathering resources in the community and using what already exists."*

A final note from Ms. McElwee:

*"I often push myself a little harder at my job by the thought of what if this was my family member? How would I want them to be treated? I grew up in a small town in Iowa. I understand rural and the needs that go with it. Also, the fact that my parents are getting older. They raised me by the Golden Rule. All of these things helped to shape my mindset around the diverse needs of rural transportation".*

# Ithaca-Tompkins County Transportation Council

**Organization:** Ithaca-Tompkins County Transportation Council  
**Service Area:** Tompkins County, NY  
**Address:** 121 East Court Street, Ithaca, NY 14850  
**Phone:** 607-274-5570  
**Website:** <http://tompkinscountyny.gov/itctc>  
**Coordinated Plan:** <http://www.tccoordinatedplan.org/>  
**Contact:** Fernando de Aragón, Executive Director  
**Email:** [fdearagon@tompkins-co.org](mailto:fdearagon@tompkins-co.org)



## WAY2GO

**Organization:** Cornell Cooperative Extension of Tompkins County  
**Service Area:** Tompkins County, NY  
**Program:** Way2Go  
**Address:** 615 Willow Avenue, Ithaca, NY 14850-3555  
**Phone:** 607-272-2292  
**Website:** <http://ccetompkins.org/community/way2go>  
**Contact:** Dawn Montanye, *Way2Go Team Leader*  
**Email:** [dm773@cornell.edu](mailto:dm773@cornell.edu)

## General Program Information

### *Ithaca-Tompkins County Transportation Council*

The Ithaca-Tompkins County Transportation Council (ITCTC) is the Metropolitan Planning Organization (MPO) for the Ithaca Urbanized Area. The ITCTC facilitates county-wide transportation planning, promotes comprehensive intermodal transportation planning with all transportation related agencies in Tompkins County, and generates transportation related information and analysis. Tompkins County is located in the west central part of New York, south of Syracuse and northwest of Binghamton, in the Finger Lakes region. It comprises the Ithaca, New York Metropolitan Statistical Area and is home to Cornell University, Ithaca College and Tompkins Cortland Community College.

The ITCTC uses the Federal Transit Administration (FTA) coordinated public transit-human services transportation process to identify transportation needs and develop strategies on how to best use resources to implement programs meeting the transportation needs of older adults,

people with disabilities, and people with low incomes. The ITCTC has an active Coordinated Plan Committee that meets regularly and updates the coordinated transportation plan for Tompkins County annually. In 2016, the ITCTC coordinated plan <http://www.tccoordinatedplan.org/> prioritized using FTA Section 5310, 5316 and 5317 funds for accessible vehicles, regional travel training, extended Americans with Disabilities Act (ADA) paratransit service, a mobility conference, Finger Lakes Rideshare (an online ride-sharing project utilizing the Zimride platform), and the Way2Go mobility management program.

## **Mobility Management Services**

### ***Way2Go***

Way2Go is a program of the Cornell Cooperative Extension of Tompkins County (CCETC), and serves as a community mobility education program that works toward a more accessible and equitable transportation system in Tompkins County and surrounding counties. Way2Go operates as Tompkins County’s transportation information and learning hub, providing the community with information and referrals on transportation resources. The Way2Go mission is “expanding access to transportation by connecting people to existing options, and helping develop new community solutions.”

Our guiding principles:

- We promote new and existing shared mobility options (such as ride sharing, car sharing, car hailing, bike sharing, demand-response bus service), while supporting public transit as the core of a robust transportation system
- We connect leaders across sectors including health, housing and employment to promote, find and develop joint solutions that reduce transportation barriers
- To the extent possible, we support transportation options and choices that reduce negative impacts on the environment
- We focus on: 75% Equity/Access, 15% General Information (5% Individual outreach, 10% to organizations) and 10% Environmental Sustainability
- Our primary audiences: Limited English Proficiency; Disabled; Seniors; Limited income; Rural populations; Newcomers

## **Program Origins/Background**

Since the late 1970s, organizational partners in Tompkins County have planned, developed, funded, operated and overseen an integrated series of bus services, paratransit services, volunteer driver, car sharing, and ridesharing incentive programs. The ITCTC and Tompkins County Department of Social Services coordinate multiple service providers under a wide variety of institutional arrangements to fill mobility gaps.

Tompkins Consolidated Area Transit (TCAT), a merger of three local systems, reorganized as a private non-profit transportation corporation, operates fixed-route and rural demand-response services. Other transit partners include Ithaca College, Tompkins County Community College, Tompkins County Department of Social Services, private paratransit providers, and taxis.

Way2Go, originally known as RideWise, was created as a part of the coordinated plan, to educate the public and especially underserved populations about all mobility services in Tompkins County. Way2Go works to contribute toward CCETC's mission to put knowledge to work in pursuit of economic vitality, ecological sustainability and social wellbeing. Way2Go brings local experience and research based solutions together, helping New York State families and communities thrive. One goal in CCETC's strategic plan for 2014-2019, is that "residents, including those with disabilities, enjoy access to affordable, dependable, sustainable transportation" as part of building strong communities. As part of creating a healthy environment, CCETC also has a goal to reduce greenhouse gas emissions from vehicles through better transportation options and choices.

## **Program Partners**

Way2Go partners with several community stakeholders to facilitate transportation education programs. They work with employers, human service agencies, transportation providers, advocates, and policy makers. The stakeholders listed below are active partners with the Way2Go mobility management program:

- Cornell University
- Ithaca College
- Tompkins Consolidated Area Transit
- Gadabout
- Ithaca Carshare/Bike Walk Tompkins
- Tompkins County Department of Social Services
- Tompkins Consolidated Area Transit
- Ithaca City School District
- Office for the Aging
- 2-1-1 Tompkins/Cortland - Human Services Coalition

## **Program Funding**

The Way2Go project was originally funded through an FTA Job Access and Reverse Commute grant that was administered by the Tompkins County Department of Social Services. The program currently operates with a combination of 80% federal/10% state (New York State Department of Transportation and New York Energy Research and Development Authority)/10% Cornell Cooperative Extension Tompkins County funds.

## Program Highlights

### *Way2Go*

Highlights from 2017 include:

- Information on medical and specialized transportation services, rideshare resources, private transportation services, and biking and walking resources are provided to the general public primarily through the program's mobile-friendly website ([www.way2go.org](http://www.way2go.org)) and through a partnership with 2-1-1 Tompkins Cortland.
- In 2017, an estimated 3,400 people used [www.way2go.org](http://www.way2go.org) and viewed the website pages over 8,600 times. 2-1-1 provided transportation information and links to services to over 1200 callers who requested information on medical transportation, senior ride programs, local bus services, taxi services, transportation expense assistance and disability related transportation.
- Throughout 2017, Way2Go worked with the Ithaca City School District (ICSD) to increase awareness of transportation options, transform the culture of transportation, and eliminate transportation as a barrier to success for students. The School Success Transportation Coalition, of which Way2Go is a partner, placed transportation liaison in each of the 12 schools within the Ithaca City School District for the 2016-2017 school year. As transportation problem solvers, the liaisons helped parents get to parent-teacher conferences and students participate in after school events, as well as get bus passes into the hands of those students who need them. Efforts were increased to facilitate rideshare and advertise transportation options to parents and students. By acting as transportation problem-solvers, liaisons have a direct impact on transportation access and equity by providing the opportunity for students to participate in after-school activities and on sports teams that they may not have otherwise been able to do.
- Way2Go was a project partner on The True Cost Tompkins project, which explored the combined cost of housing and transportation in Tompkins County, providing a more accurate picture for community members, planners, community leaders, and decision makers.
- The project team developed twelve case studies demonstrating strategies for balancing the cost of housing and transportation of moderate-income households in the county, including specifics on financial and transportation choices. The team also developed a locally calibrated tool for calculating the relative transportation and housing costs of living throughout the County. The tool, paired with case studies, was used in a series of community outreach events, directly reaching 140 people.
- The case studies brought to light particular challenges that individuals or families earning \$40,000 or less face in Tompkins County in trying to balance the costs of housing and transportation. The case studies also highlighted four strategies for coping with the combined housing and transportation costs: choosing smaller living spaces, sharing



housing, reducing the need to drive or living in locations where housing and or transportation are most affordable

- In response to a request of the Cornell's Caregivers' Network, Way2Go held a workshop on "Aging, Driving and Family Conversations" at Cornell University. The timely workshop covered: aging's effects on driving; types and benefits of driving assessments; conversations about driving safety; interventions when talks fail; and transportation alternatives to driving. Participants left better informed and motivated to have conversations with friends and family members about safe driving and driving retirement. This workshop will be help community wide starting in 2018.
- Move Together New York (MTNY), Way2Go's regional transportation project, aims to develop a regional understanding of existing transportation options and unmet needs, and determine how access to medical care and employment can be improved, particularly across county lines. In 2017, MTNY supported the creation of a public cross-county transit route, operated by Schuyler County Transit, connecting Watkins Glen to Ithaca, and helping to serve those who need access to medical facilities and work.

## **Program Challenges/Lessons Learned**

### *Ithaca-Tompkins County Transportation Council*

Fernando de Aragón, Executive Director of the Ithaca-Tompkins County Transportation Council, shared the following advice about transportation challenges in rural areas.

*"Every area in the country will face its own transportation challenges based on numerous factors—housing costs, settlement patterns, available services, and local politics. Below is a brief list of the issues affecting transportation planning in the Ithaca-Tompkins County area.*

**Urban/rural dynamic:** *The Ithaca urban area has become a desirable place to live. That demand, coupled with a variety of other factors, resulted in high housing costs. As a result, many low to moderate income households have relocated to more rural areas. This has placed many who could benefit the most from access to transit in locations that are most difficult to serve by transit.*

**Regional employment:** *The Ithaca urban area is a major regional employment center. Over 15,000 persons per day commute into Tompkins County from neighboring counties. Of those, approximately 80% drive alone creating congestion and all its secondary negative impacts – emissions, safety, fossil fuel consumption, noise, etc.*

**Transit intensive community:** *TCAT offers a very high level of transit service in Tompkins County. However, there continues to be unmet transit demand, particularly from suburban and exurban/rural areas that are more difficult and costly to serve with fixed-route bus service. Because*

*of its small population, the Ithaca urban area lacks the economies of scale to help fund the actual oversized demand for transit.*

As for engaging community partners to solve some of the problems noted above, it is important to consider that transportation plays a key role in quality of life, but not all organizations have this as a key consideration. In order to make this connection between transportation and quality of life more visible, first build “coalitions of the willing” with likeminded members of local organizations—begin gaining momentum and make consistent and concerted efforts to bring transportation considerations to the table.”

## **Way2Go**

In Tompkins County, as in many communities, there are transportation knowledge, skill, and service gaps. Way2Go empowers individuals and organizations through varied educational approaches, by sharing information on the services that are available, and collecting and sharing information on the gaps that need to be filled. Below are some recommendations and lessons learned from Way2Go’s Team Leader and mobility manager Dawn Montanye in relation to a number of issues.

*“**Access to health care:** Access to preventative care has been proven to reduce ER visits. This information is important to getting transportation considered in conversations around improving health outcomes.*

*Given that transportation is key to accessing health care, encourage greater consideration of transportation by the health care provider including times that appointments are scheduled, or times that patients are released from the hospital, or even providing transportation assistance/planning at the doctor’s office.*

***Work with employers:** Reliable transportation is a significant factor in determining if people, particularly in rural areas, can maintain employment or not—which has a great impact on their ability to sustain themselves and their family.*

*Encourage employers to align work shifts with bus schedules, or have flexible work to allow people to take advantage of alternatives like carpools, or remote work.*

***Work with planners and developers:** When the location of housing is being determined, asking the question about whether is it accessible for people who do not have a car? What are the impacts of people driving longer distances to lower housing costs?*

*To gain support from partners beyond those already willing to join your cause: You have to demonstrate to partners what benefit you can provide to them.*

*Encouraging economically and environmentally friendly diverse modes of travel, in order to reduce road and parking demand in downtown areas: An outreach program should be implemented right after usual move-in time (such as the beginning of the college semester) to attract the largest*

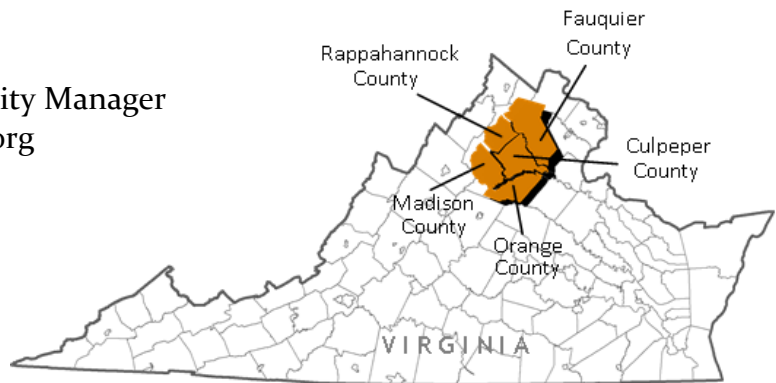
*number of participants. It's best to target a well-defined neighborhood that is more dependent on single occupancy vehicles, as long as the target area has access to many transportation options to accommodate the mode shift that people are asked to do. Simplify any registration process.*

*In rural areas in particular, there are high needs for all kinds of services, medical, mental health, healthy foods etc., and very limited resources and staff to provide them—so if you are looking to gain support and partner with other organizations, you have to (at least at first) be providing them something useful, with very little, if any, increase to their existing workload.”*

# Rappahannock-Rapidan Regional Commission

## Foothills Area Mobility System

**Organization:** Rappahannock-Rapidan Regional Commission  
**Service Area:** Culpeper, Fauquier, Madison, Orange, and Rappahannock Counties, VA  
**Address:** 420 Southridge Parkway, Suite 106, Culpeper, VA 22701  
**Phone:** 540-829-7450  
**Websites:** [www.rrregion.org](http://www.rrregion.org)  
[www.fams.org](http://www.fams.org)  
**Contact:** Jenny Biche, Mobility Manager  
**Email:** [jkbiche@rrregion.org](mailto:jkbiche@rrregion.org)



### General Program Information

Rappahannock-Rapidan Regional Commission (RRRC) is one of 21 Virginia Planning District Commissions. The RRRC represents Culpeper, Fauquier, Madison, Orange, and Rappahannock Counties and the towns of Culpeper, Gordonsville, Madison, Orange, Remington, The Plains, Warrenton, and Washington. Established by its member governments through a charter agreement under Virginia law as a political subdivision of the Commonwealth, the RRRC serves the government, businesses, and citizens of the region. The Commission promotes regional cooperation and provides support to member localities in transportation planning, environmental planning, housing, land use planning, comprehensive planning, GIS and economic development.

### Mobility Management Services

The Foothills Area Mobility System (FAMS) is a regional mobility management program overseen by the RRRC. FAMS is a multi-faceted program that involves the following efforts:

- **FAMS Call Center:** A one-call/click transportation center that provides free information and referral on available public, private and volunteer transportation services in the Rappahannock-Rapidan region. The FAMS Call Center is staffed by one part-time Mobility Manager, one part-time Supervisor, and two full-time Mobility Specialists. The

Mobility Manager oversees the program, researches and secures funding sources, provides marketing and team building, facilitates planning meetings, and does data tracking and analyzing. Mobility Specialists provide person-centered information and referral on available public, private and volunteer transportation services in the region, travel training, trip planning, marketing and outreach, data tracking, coordinating the volunteer driver program, and attending community meetings. The call center is open Monday through Friday from 8:30 a.m. to 4:30 p.m., and can be accessed via phone or website. The website and social media are used for information sharing and marketing.

- **Transportation Resource Guide:** This guide provides a comprehensive list of the public, private, and volunteer transportation providers in the region. The Transportation Resource Guide is updated on a regular basis, and is available through the FAMS website to allow residents to access information on mobility options when the call center is closed.
- **Foothills Express:** An on-demand/fixed route hybrid shuttle bus, the Foothills Express connects Culpeper and Madison in the region to Charlottesville, Virginia. Bus stop locations, days, and times are fixed in Culpeper and Madison, and riders choose their destination in Charlottesville. This service operates three days per week, with three round trips on each day of service.
- **Coordinated Transportation Planning:** Working with the Virginia Department of Rail and Public Transportation (DRPT) and regional stakeholders, RRRC facilitates updates of the Coordinated Human Services Mobility (CHSM) Plan that serves as the federally required coordinated public transit-human services transportation plan for the area. This planning includes the identification of human services transportation needs and unmet needs in the region.
- **Coordination of Regional Volunteer Transportation:** FAMS provides information on volunteer driver programs in the region, and helps to facilitate recruitment of volunteers for these programs.
- **Research and Development of Applicable Grants:** Through the FAMS program, RRRC seeks to identify funding opportunities to improve and expand mobility in the region.
- **Facilitating Regional Committees:** The FAMS regional mobility management program includes implementation of the FAMS Steering Committee and two subcommittees – FAMS Volunteer Transportation Subcommittee and FAMS Employment Transportation Subcommittee.

## **Program Origins/Background**

The 2008 CHSM Plan identified the need for a one-stop resource for all transportation services available in the region. In 2009, RRRC was able to use Federal Transit Administration New Freedom Program funding to develop the FAMS Call Center and Regional Mobility Management Program.

## **Program Partners**

FAMS is a collaborative partnership between the RRRC and:

- Aging Together -which represents dozens of human service organizations in the region
- Rappahannock-Rapidan Community Services Board
- Virginia Regional Transit
- Non-profit agencies
- Human service agencies
- Other transportation providers
- Community stakeholders

These partner organizations work collaboratively to support, expand, and improve human service transportation in the region. The FAMS Steering Committee meets quarterly to coordinate transportation services for human service agencies and underserved populations.

In 2016, the FAMS regional mobility management program built upon the FAMS Steering Committee by creating the FAMS Employment Transportation Subcommittee and the FAMS Volunteer Transportation Subcommittee. Both subcommittees meet monthly to address challenges, identify unmet needs, and work collaboratively, focusing on employment and volunteer transportation specifically. Public transportation forums, driver recruitment events, surveys, recognition events, education and outreach, and other accomplishments have been completed since their inception. Both subcommittees report to the FAMS Steering Committee on their activities quarterly. The Mobility Manager is an ex-officio member of the Culpeper Public Transportation Board and helped develop the Fauquier and Rappahannock Mobility Council, of which FAMS is a member. The Mobility Manager is also an active and founding member of the Virginia Mobility Manager Council.

## **Program Funding**

As noted previously, RRRC was able to initially use FTA New Freedom Program funding to develop the FAMS Call Center and Regional Mobility Management Program. Since the New Freedom program was rolled in the FTA Section 5310 program, the FAMS Call Center and Regional Mobility Management Program have been funded through the Section 5310 program.

The FAMS Regional Mobility Management Program staff continually researches and applies for grants to support, improve and expand transportation services in the region. Since its inception, the program has secured several grants addressing various unmet needs:

- In 2012, a Veterans Transportation Community Living Initiative (VTCLI) grant was awarded to Culpepper County to build a physical location for the FAMS Call Center, engage veterans and military families in transportation planning, and expand the FAMS Call Center services. FAMS worked with local Veterans of Foreign Wars (VFW) posts, the National Guard, the Red Cross, and local departments that serve veterans to develop the “Transportation Resource Guide for Veterans and Military Families” which is posted on the FAMS website.
- A Virginia Department for Aging and Rehabilitative Services grant was awarded to FAMS in 2013 to develop and implement a six month dialysis transportation pilot, followed by a one-year Section 5310 grant to continue the project. This project piloted a new service to transport dialysis patients to and from their treatments. Ultimately the travel distances involved and the dialysis treatment needs of each individual rider were too challenging to serve efficiently.
- In 2016, an FTA Section 5310 Program grant funded a Rides-2-Wellness pilot to understand and address transportation challenges to healthcare. For this project, FAMS has been working with three free clinics, in Culpeper, Fauquier, and Rappahannock Counties, to provide mobility management services to their clients. The clinics refer new clients to the FAMS Call Center, as well as clients who no-show their healthcare appointments, for assistance in accessing transportation, through information and referral, assistance with scheduling, travel training, and taxi vouchers or gas cards as a last resort. Through this project FAMS has learned that people are often unaware that they need transportation assistance—they may not attribute missing an appointment or delays in prescription refills to lack of transportation. This has led FAMS to changing needs assessment questions to help people better understand how to access the healthcare they need. Clinics are tracking appointment no-shows, consistency of prescription pick-ups, and client health improvement to measure the impacts of the mobility management services in helping people get the care they need.

## **Program Highlights**

By leveraging resources, preventing duplication of services, and building upon what was already available, RRRRC reports that the FAMS Call Center has been successful and that requests for assistance for transportation continues to grow each year. Since implementing the program through December 2016, the FAMS Call Center has received 6,321 requests for assistance with transportation.

In 2016, the Foothills Express provided 1,310 one-way trips for 1,150 unduplicated passengers. The majority (73%) of those trips were for medical appointments. From when the service began in



2011 through December of 2016, the Foothills Express has provided 9,799 one-way trips, with more than half of which were utilized for medical destinations.

On October 1, 2016 the FAMS regional mobility management program developed and began implementation of a Voucher Program. Customers unable to use public transportation, who are not eligible for Medicaid-funded transportation, who cannot afford private transportation, and for whom a volunteer driver is not available, may be eligible for a gas card to help them get to their destination. If the customer can find their own ride, the FAMS Call Center will provide a gas card to help get them to their destination. Public transit tokens and Foothills Express vouchers are also available to those who cannot afford the fare.

Beginning October 1, 2017, the FAMS Voucher Program will be expanded to include taxi vouchers to further help address the unmet needs in the region.

The FAMS Regional Mobility Management Program has been instrumental in the development of the Orange Connector public transit service and assists in marketing all public transit services in the region. FAMS helped garner support from local governments to provide the cash match for an FTA Section 5311 grant to start the Orange Connector. The Orange Connector, operated by VRT, is the first public transit service in the region that crosses county lines, connecting residents of Orange County with regional destinations in Culpeper. The FAMS website includes schedules of this route and other public transit services that serve or connect with the Rappahannock-Rapidan region.

## **Program Challenges/Lessons Learned**

Due to the rural nature of the Rappahannock-Rapidan region there are few public or private transportation services available, and thus the community relies heavily on the FAMS one-call-center and volunteer transportation programs. Public transit availability and service hours change from year to year due to funding, and private providers come and go quickly, so having up-to-date information on available resources helps the community and the transit service by making sure everyone has the most current information.

There are many transportation challenges in the Rappahannock-Rapidan region. Volunteer driver turnover is one challenge, as many volunteer drivers become too old to drive for the program, burn out, or become in need of transportation themselves as their health declines. Funding can also be a challenge; even when a grant is available, it often requires a cash match which can be difficult to secure. While transportation services and resources often change, what remains stable is the growing need. Rural communities typically face another challenge—destinations are often far away and it takes longer and costs more to transport clients to their destinations. Therefore ridership in rural areas is not as high as in urban areas because one-way trips take longer to reach and not as many trips can be provided or clients served.

FAMS Mobility Manager Jenny Biche shared the following advice for new one-call centers:

*“If you don't have a lot of money to start with, but you want to build a one-call center, consider using Google Voice. That's how we started our one-call center. It's free, allows for a lot of flexibility, and captures data for you. Even after our call center was built and established, we continue to use Google Voice for the free text messaging option. This is especially helpful when communicating with our low income clients who have cell phones with limited minutes. When our low income clients' minutes run out, they can no longer make or receive phone calls, but they can text and receive text messages. This enables our mobility specialists to communicate with clients without having to use their own personal phones and keeps their information confidential.”*

Ms. Biche noted that FAMS is now using Google Sheets, which is free, as a tool for coordinating volunteer schedules.

She advises new mobility management programs to partner with as many people and organizations as possible. To help raise awareness, she suggests promoting human interest stories about the impact of the mobility management services and sharing them with funders and the public. Ms. Biche advises:

*“Do outreach, and then do it again. Often the person you talked to no longer works there and you have to tell the new person. Or they don't need you at the moment, and lose your information or forget about you and then when they do need you, they don't remember you.*

*Just start and don't wait until you have all your i's dotted and your t's crossed. Realize that failures are learning opportunities that will lead to making your program better.”*

# Senior Citizens Of Kodiak Kodiak Area Transit System

**Organization:** Senior Citizens of Kodiak, Inc.  
**Service Area:** Kodiak Island Borough, Kodiak, AK  
**Address:** 302 Erskine, Kodiak, AK 99615  
**Phone:** 907-486-6181  
**Websites:** [www.kodiakseniorcenter.org](http://www.kodiakseniorcenter.org)  
[www.katsbus.org](http://www.katsbus.org)  
**Contact:** Pat Branson, Executive Director  
**Email:** [scokinc@ak.net](mailto:scokinc@ak.net)



## General Program Information

Incorporated in 1973, Senior Citizens of Kodiak, Inc. (SCOK) is a senior center on Kodiak Island, Alaska. In addition to leading the Kodiak Area Transit System (KATS), the organization collaborates with multiple agencies to provide a comprehensive blanket of support to seniors in the community.

SCOK's primary mission is health, education and social services for people ages 60 and older. The organization provides services including caregiver support, health equipment loans, information and referral, adult day programs, meals, in-home services, preventative health, outreach, and public and human service transportation (provided by KATS).

KATS provides dial-a-ride service Monday through Friday between the hours of 6:30 a.m. and 6:30 p.m., and Saturday and Sunday the hours are from 10:00 a.m. through 3:00 p.m. Riders must schedule before 5:30pm the day before for dial-a-ride service and on Friday for the weekends and Mondays. KATS services several scheduled time points on weekdays between 8:30am and 5:55pm.

SCOK serves as the KATS program administrator, applying for grants and producing appropriate operating and financial reports. SCOK contracts with First Student, the community's school bus operator, for operations, dispatch, insurance, and maintenance of their two buses. Their two buses are equipped with wheelchair lifts that enable people who cannot navigate steps to ride the bus. A third bus is scheduled to be added to the fleet in 2017, and there are future plans to order a new replacement bus every two years to help manage wear and tear and maintain a fleet of three operational transit vehicles.

## **Mobility Management Services**

KATS serves as a one-stop shop for all transportation calls, coordinating with over fifteen local non-profit organizations. Through this coordination, KATS provides trips for people served by these agencies to adult day centers, senior centers, appointments, shopping, college, and work.

The mobility management service affects the greater part of Kodiak by helping those with the greatest need to access transportation. The service is provided to the public as well as to clients of non-profit organizations.

In addition to the services operated by KATS, there are some church vans and number of taxis on the island (although taxis are too expensive for many people).

## **Program Origins/Background**

The foundation for the current KATS system began with SCOK's mobility management program.

KATS was originally a pilot project, funded through a Community Transportation Association of America (CTAA) grant with the Kodiak Island Borough in 1998-1999. The Borough Assembly voted not to continue KATS after the pilot funds had been used. SCOK took the project up, met with local non-profit agencies, and began a coordinated service in 2000 with the non-profits buying into the service. SCOK was responsible for all of the administrative work including contracting with First Student for transportation management services

The KATS system at this time was a coordinated transit system for 15 nonprofits, most of whom are Alaska Mental Health Trust beneficiaries, serving people with disabilities, mental illness or Alzheimer's disease. Since then, through mobility management efforts, the KATS service has evolved to a dial-a-ride transportation service open to all Kodiak residents. SCOK continues to serve as been the lead agency and administrator for KATS. KATS service has evolved to a dial-a-ride transportation service open to all; KATS is for everyone. SCOK continues to serve as the lead agency and administrator for KATS.

## **Program Partners**

Funding partners in the KATS mobility management program include the City of Kodiak, Sun'aq Tribe of Kodiak, Alaska Department of Transportation and Public Facilities, FTA, and non-profit agencies and organizations.

Partnering human service agencies participate on the Human Service Coalition, which meets quarterly to discuss social services, KATS services, transportation needs, and transportation issues. The Human Service Coalition members include:

- Providence Kodiak Island Medical Center

- Providence Kodiak Island Counseling Center
- Providence Long Term Care Facility
- Island Cove Adult Day Program
- Kodiak Senior Center
- Hope Community Resources
- Kodiak Women's Resource and Crisis Center
- Kodiak Island Housing Authority
- Vocational Rehabilitation
- Kodiak College
- Kodiak Area Native Association
- Kodiak Area Mentor Program
- Salvation Army
- Sun'aq Tribe of Kodiak
- Women, Infants and Children Program
- Kodiak Job Service
- Threshold Recycling Services
- Kodiak Food Bank
- Kodiak Baptist Mission
- Brother Frances Shelter

First Student, Inc. is also a partner as the contract operator for KATS.

## **Program Funding**

The Alaska Department of Transportation and Public Facilities passes through FTA Section 5311 grant funds to Senior Citizens of Kodiak, Inc., and SCOK uses these funds to support KATS services. The non-profit agencies that participate in the coordinated system provide financial support by purchasing fare tickets for their clients and beneficiaries at a cost of \$2.00 each. General public riders help support the service through fares, which are \$2.00 for each one-way ride. The City of Kodiak provides funds which are used for local match.

Additionally, the Sun'aq Tribe of Kodiak acquired funds from the Bureau of Indian Affairs Transportation Fund to support the operation of the KATS service.

In past years KATS has been funded in part by the FTA Section 5310 program and the former FTA Job Access and Reverse Commute (JARC) program, through the Alaska Department of Transportation and Public Facilities.

## **Program Highlights**

The early efforts of the mobility management program grew into a public transit service that continues to meet human service transportation needs. Coordinated service is often a secondary function of a public transit system. In the Kodiak community, SCOK built the public transit

system by first asking human service agencies to coordinate to develop a transit system, and it worked. Today, KATS provides about 1,700 rides per month for local non-profits and to the public through a dial-a-ride system.

SCOK noted that the efficiency of KATS combined with contracting with a company that specializes in transportation has saved the community money.

## **Program Challenges/Lessons Learned**

SCOK's largest success is maintaining transportation service in Kodiak for those who need it the most with insufficient resources (a challenge common to many rural transit programs). At times when there was not enough grant funding for KATS, the SCOK board recognized the need and impact of this service and dedicated other funds to support the KATS program. SCOK remains committed to continuing KATS transportation services for the community.

SCOK indicated that in the beginning it was challenging to get all the non-profit agencies to give up their vehicles, and trust that their clients would be taken care of and a single coordinated service would meet all their needs. Eventually it worked well, but it took time for the "buy-ins."

# Shiawassee Area Transportation Agency Transportation Solutions Division

**Organization:** Shiawassee Area Transportation Agency  
**Service Area:** Shiawassee County, MI  
**Address:** 180 N Delaney Road  
Owosso, MI 48867  
**Phone:** 989-729-2687  
**Website:** [https://www.michigan.gov/mdot/0,4616,7-151-9625\\_21607-164361--,00.html](https://www.michigan.gov/mdot/0,4616,7-151-9625_21607-164361--,00.html)  
**Contact:** MaLissa Schutt, Mobility Manager  
**Email:** [mschutt@satabus.org](mailto:mschutt@satabus.org)



## General Program Information

The Shiawassee Area Transportation Agency (SATA) provides curb-to-curb, dial-a-ride transportation services in Shiawassee County, Michigan. SATA is governed by a board that is comprised of those municipalities involved that are in the creation of the organization (2000), and includes the Cities of Owosso, Corunna, Durand, and Perry; the Township of Caledonia; and the Shiawassee Regional Education Service District (SRES).

SATA services operate Monday through Friday, 6:00 a.m. to 6:00 p.m., with extended hours 6:00 p.m. to 10:00 p.m. in the Owosso-Corunna area. Preference is given to residents of the townships of Bennington, Caledonia, Owosso, Venice and Vernon and the cities of Corunna, Durand, Owosso, and Perry. SATA services are open to the general public and customers can call to schedule a pick up the same day (while encouraged to call the day before to ensure availability). All trip purposes are eligible under SATA services, and all vehicles are wheelchair accessible.

## Mobility Management Services

If the SATA dial-a-ride service cannot accommodate a trip request, customers are referred to SATA's Transportation Solutions Division (TSD). Services provided through TSD include a community coordination program, a volunteer driver/escort program, and an accessible taxi



program. The SATA Facebook page is used to coordinate rides and communicate with the public. TSD's transportation service hours are 24 hours a day, 365 days a year, contingent upon the availability of a volunteer or taxi driver's availability. People who are eligible for TSD transportation services vary by program. When requests are received by the general public who do not meet TSD eligibility requirements, SATA will attempt to accommodate their requests when possible.

Mobility management services involve:

- **Community coordination program:** Available to all county residents. This program is essentially an information and referral program through which TSD staff provides information on available transportation services. TSD staff coordinates with local health and human service agencies to ensure each individual gets where they need to go. If SATA and TSD cannot accommodate the trip through one of their programs, TSD connects the resident with additional transportation opportunities in the community. TSD coordinates with local faith based organizations and churches to utilize their volunteers and vehicles to help meet community transportation needs.
- **Volunteer driver/escort program:** Provides door-to-door service for eligible residents of Shiawassee County. Older adults (over age 60), veterans, and people with disabilities are eligible. Volunteers receive mileage reimbursement in exchange for using their personal vehicles to provide transportation services. Eighty percent of TSD trips are provided by volunteer drivers. Background checks, criminal history and driving record checks, and vehicle inspections are conducted. TSD provides additional liability insurance.
- **Accessible taxi program:** Operated in the same fashion as SATA dial-a-ride bus service. Older adults (over age 60), veterans, and people with disabilities are eligible to use the accessible "taxi" program. For eligible residents, TSD offers two wheelchair accessible vehicles (a minivan and bus) to provide transportation. Vehicles are owned and operated by SATA and the service is curb-to-curb. These demand response vehicles are used for passengers requiring wheelchair accessibility that cannot be accommodated with volunteer drivers.

The Volunteer driver and accessible taxi programs can be accessed by the general public if TSD has an eligible resident going that way and a ride can be shared. For example, if a person who is eligible for an accessible taxi needs to get to an out-of-county destination and a person not meeting the eligibility requirements needs the same ride at about the same time going in the same direction, TSD can accommodate the non-eligible person's trip request through ride sharing.

TSD is staffed with two paid part-time dispatchers and one volunteer part-time dispatcher in addition to the Mobility Manager. The volunteer staff is placed in the TSD office for up to twenty hours a week and is paid through the Senior Community Service Employment Program (SCSEP).

TSD has also utilized local college interns and residents receiving assistance through the Department of Health and Human Services to meet staffing needs.

## **Program Origins/Background**

SATA was created in 2000 by the Cities of Owosso, Corunna, Durand, and Perry; and SRES D under the Michigan Urban Cooperation Act 7 of 1967. The Michigan Urban Cooperation Act 7 of 1967 allows inter-local public agency agreements to provide standards, filing and status of these agreements. In an effort to reduce the duplication of services and expand transportation opportunities in Shiawassee County, the Arc Shiawassee, Shiawassee Council on Aging (SCOA), and Memorial Healthcare (a local hospital) turned over their vehicles to SATA so that they can provide transportation services for their clients and other county residents. These vehicles served as the first fleet for SATA.

The TSD of SATA began in 2008 in an effort to meet the needs beyond the days/times/geographical locations of SATA dial-a-ride bus services, to include weekends, late night, holidays, and out-of-county trip requests. TSD sought to offer a service that could provide the same freedoms that car owner's experience, i.e., going where they need to go, when they need to go. The programs of TSD were developed and are administered by the TSD Mobility Manager, in alliance with the Shiawassee County Coordinated Health and Human Service Transportation Plan.

## **Program Partners**

TSD partners with many agencies in Shiawassee County including:

- Shiawassee Council on Aging
- McLaren Medicaid (also known as McLaren Health Plan)
- Shiawassee Department of Veterans' Affairs
- Valley Area on Aging My Choice Waiver program and Retired Senior Volunteer Program
- Michigan Rehabilitation Services
- Shiawassee County Department of Health and Human Services
- Looking Glass Community Outreach
- Respite Volunteers of Shiawassee
- Memorial Healthcare
- School districts
- Local faith based organizations

TSD collaborates with partner agencies by providing transportation services at negotiated rates and/or provides referrals to other transportation resources in the community. TSD also coordinates with transportation programs and services to help eliminate the duplication of efforts and increase the ability to do more through coordinated services (rather than each of them doing their own thing in their own silos), serving as the one-stop for transportation information in Shiawassee County.

One example of SATA's interagency collaboration is with SCOA. SCOA pays SATA fares for older adults (ages 60 and older) who ride Monday through Friday during the hours of 9:00 a.m. to 6:00 p.m. SATA shares office space and mechanics with SRES in Owosso.

A partnership with the Shiawassee Council on Aging helps to provide free rides to older adults (ages 60+), Monday through Friday, 9:00 a.m. to 6:00 p.m. SATA dial-a-ride bus service is available to all Shiawassee County residents for any purpose. SATA incorporates school transportation into their existing dial-a-ride bus service. SATA's fares are primarily paid for by passengers, however, there are some circumstances for which the schools pay for rides. McKinney-Vinto and Corunna Public Schools pay for rides for eligible students on the SATA dial-a-ride bus.

## **Program Funding**

SATA's dial-a-ride bus service is funded with 55% state and federal grants; 23% fares from passengers and contracting agencies; 19% local municipal support (taxes and/or general funds); and 3% miscellaneous such as advertising, sale of used vehicles, interest, memorials, and donations. Cities and townships providing local municipal support are referred to as "participating municipalities". Cities and townships that do not provide financial support to SATA are referred to as "non-participating municipalities". The participating residents pay a reduced fare and can schedule a trip anytime. Non-participating residents pay a higher fare and can only schedule a ride the day before or the day of service. Most non-participating requests are not accommodated by the SATA dial-a-ride bus service, and are referred to TSD.

TSD is funded through the Federal Transit Administration Section 5310 and Section 5311 grants, administered by Michigan Department of Transportation's Office of Passenger Transportation. TSD uses in-kind services and agency service agreements to produce the local match requirement. In-kind services have included staffing their office with volunteer staff that is paid for through other programs.

## **Program Highlights**

SATA provides about 100,000 rides a year; 90,000 on the dial-a-ride bus and 10,000 through TSD services. TSD has significantly grown since it began in 2008. TSD's Mobility Manager reports that TSD consistently experiences a 20% increase in ridership each month. In 2016, TSD provided

10,000 rides; 80% of those rides were for medical purposes and out-of-county destinations. Seventy-five percent of the trips provided by TSD are to out-of-county destinations; the remaining 25% are in-county for non-participating residents or for participating residents during times when the dial-a-ride bus service does not operate.

Shiawassee County is surrounded geographically by larger, urban communities, and as a result its residents need to access out-of-county destinations for medical and employment opportunities. TSD inter-local agreements with all the surrounding counties have been developed to allow for provision of out-of-county services to meet these needs.

TSD uses the same dispatching software as SATA, allowing access to the rider, stop, and trip information in the database. Because TSD is connected in this way to SATA's dial-a-ride services, they can see the trips on SATA's dial-a-ride and vice versa. All SATA and TSD programs are reservation-based. Customers must call at least 24 hours in advance for TSD services. Riders can call the same day to request SATA dial-a-ride service; however, SATA encourages residents to call the day before to ensure availability. Although TSD schedules rides for any trip purpose, priority is given to medical and employment trip purposes.

TSD has extended the transportation services available to Shiawassee County residents allowing them to access services out of the county, in the evenings and during weekends. Unlike the limited SATA dial-a-ride services, TSD service hours are 24 hours a day, 365 days a year contingent upon the availability of a driver.

Some of TSD's accomplishments during its first decade of service include the following:

- Become the sole provider for non-emergency medical transportation (NEMT) through McLaren Medicaid. Before TSD existed, the company paid private taxi companies to drive from different counties into Shiawassee County to meet their transportation needs. TSD collaborates with the Department of Health and Human Services to assist with NEMT needs.
- Secured funding for 50 hours of additional dispatching staff, two paid part-time dispatchers. For the first four years of the program, TSD's office staff was comprised of all volunteers with the exception of the Mobility Manager. A challenge with volunteer staff is that they typically do not stay long, causing a high turnover rate.
- Established a mobility management program with an all-inclusive understanding of mobility within the community, reflecting the ideological change from moving buses to moving people.
- Significantly improved the coordination of services with local health and human service agencies to reduce the duplication of services and help each agency to do more with the same funding.
- Program Challenges/Lessons Learned

Shiawassee health and human service agencies have been great at partnering and finding ways to coordinate their efforts with TSD. However, Ms. Schutt noted that:

*“The biggest challenge with mobility management in Shiawassee County at the moment is getting people and agencies to remember to have transportation at the table in the planning stages rather than after the fact. This helps to eliminate unnecessary work in ensuring the services needed can be accommodated.”*

Funding is also a big challenge. When TSD started in 2008 there were no agencies willing to help contribute to the local match requirement so TSD utilized in-kind services to meet the match requirement. In-kind services include the dispatching staff mentioned previously and the service hours of volunteers who operated their own vehicles for mileage reimbursement through the Retired Volunteer Senior Program (RSVP). TSD dual enrolled their volunteer drivers with RSVP by submitting timesheets to RSVP so they can demonstrate the hours and miles that are occurring using volunteers. In return, RSVP reimbursed TSD up to a negotiated amount per volunteer for mileage driven by TSD volunteer drivers. TSD also uses revenue from service agreements with local health and human service agencies to meet local match requirements.

Ms. Schutt shared the following:

*“The biggest challenge facing rural communities today, especially in applying Mobility Management concepts, is the lack of available transportation options. In urban communities you can typically list pages of both public and private transportation services and programs; whereas, in a rural community the public transportation agency is usually the only traditional transportation resource.*

*What I learned was to identify the assets in our community and build upon those assets. Our assets include trains, a local airport, charter services through Indian Trails, neighbors willing to help others, churches, and commuters commuting out-of-county for work. Each of these assets presents as a transportation option. Each of these transportation options are non-traditional means of helping get people where they need to go. Rather than stay in the bus box, I have learned to think outside that box and look at the big picture of mobility in our community.”*

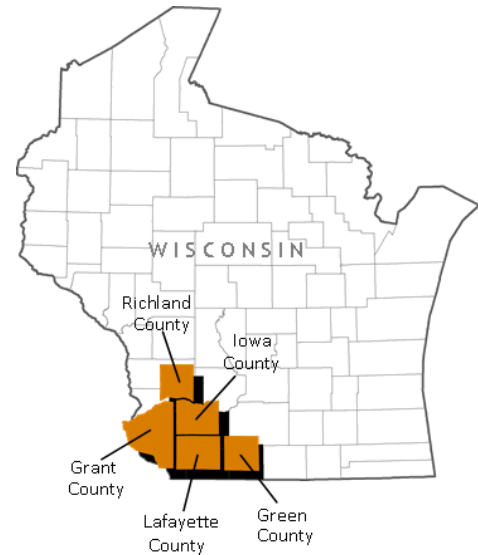
Overall, “thinking outside the bus box” efforts that have worked for TSD include:

- Looking at all forms of transportation assets, and coordinating with these services to ensure transportation options are available for visitors coming into the community. For example, Indian Trails offers intercity bus routes and charter services throughout Michigan and they have a local office and buses leaving the Shiawassee community every day.
- Focusing on neighbors willing to help others for recruiting volunteer drivers.
- Tapping into the 120 churches with volunteers and vehicles looking to serve others in Shiawassee County. TSD is currently developing a faith-based transportation network that will allow TSD to email churches with transportation requests and needs, and ask them to recruit volunteers to help meet the needs. The faith-based transportation network could also help with coordinating the church vehicles that are unused most of the time (they are used only on Wednesdays and Sundays).

- Employment transportation continues to be a challenge because it is difficult to rely on volunteer drivers for the ongoing needs involved in employment transportation. Seventy percent of Shiawassee County's working residents commute out-of-county for employment. TSD is currently developing a rideshare website that will connect commuters traveling out-of-county with people needing transportation for employment. TSD received the funding this year to develop that website application.

# Southwestern Wisconsin Community Action Lift

**Organization:** Southwestern Wisconsin Community Action Program  
**Service Area:** Grant, Green, Iowa, Lafayette and Richland Counties, WI  
**Address:** 201 S Iowa Street, Dodgeville, WI 53533  
**Phone:** 608-930-2191 or 877-798-5438  
**Website:** [www.swt-lift.org](http://www.swt-lift.org)  
**Contact:** Lori Jacobson  
Assistant Transportation Director  
**Email:** [l.jacobson@swcap.org](mailto:l.jacobson@swcap.org)



## General Program Information

Southwestern Wisconsin Community Action Program, Inc. (SWCAP) offers several different programs to aid and assist older adults, people with disabilities and low income populations within Grant, Green, Iowa, Lafayette and Richland Counties. Incorporated in 1966 in Dodgeville, Wisconsin as a private non-profit organization, SWCAP is governed by a 24 member volunteer Board of Directors. The services they offer to the community include:

- Housing assistance
- Dental hygiene and referral
- Early childhood education
- Community emergency services
- Foster grandparent assistance
- Rental assistance (HUD)
- Transportation referral and services (LIFT)
- Work 'n Wheels auto loan program
- Workforce support and training
- Neighborhood health partners
- Food pantry
- Women, Infants & Children Nutrition



## **Mobility Management Services**

Based in SWCAP, the Leadership in Innovative Flexible Transportation (LIFT) program employs a regional approach to transportation and builds on existing systems. The LIFT program uses mobility management to coordinate existing transportation services, acting as a referral-first agency. They maintain a list of transportation resources and coordinate with all specialized transportation providers in the region. If an existing transportation service is not available, they help fill in the gaps through their volunteer driver program or with one of their accessible vehicles. Their transportation services cover nine counties in Southwestern Wisconsin.

SWCAP also offers training for volunteer and staff drivers for every agency in the region at least once a year. They host a weekly community bicycle ride from May through September, and provide travel training to individuals aging out of school programs in five counties.

LIFT employs two mobility managers to operate the following mobility management services:

- Work 'n' Wheels- zero-interest vehicle purchase program
- LIFT- volunteer driver program
- Human Services Vehicle (HSV)- demand response transportation with accessible vans
- One-Call-One-Click - transportation referral service
- Travel training
- Driver training
- Developing innovative- accessible and affordable ways to transport people

The mobility managers are active in the state mobility manager association, Wisconsin Association of Mobility Managers (WAMM); one mobility manager is currently serving on the board of directors, and another is serving as the WAMM representative on the Wisconsin Volunteer Coordinators Association Board. LIFT's mobility managers are certified through WAMM. Both mobility managers actively advocate for improved access and service for individuals who are transportation disadvantaged.

## **Program Origins/Background**

The LIFT program started in 2006 as a consortium to improve transportation services in the area. The consortium, called the Southwest Transit Team, includes representatives from Grant, Green, Iowa, Lafayette and Richland Counties, as well as the Hodan Center, Southwest Opportunities Center, Southwest Regional Planning Commission, Wisconsin Department of Vocational Rehabilitation, and Southwestern Wisconsin Community Action Program. They originally intended to be a one-call center referring people who need rides to existing transportation providers. However in 2009 with growing demand and limited transportation services available, LIFT started a volunteer driving program housed at SWCAP to address the unmet needs. In 2010, they provided 1,227 one-way rides. LIFT's volunteer driver transportation service is door-through-door and operates every day at any time a willing driver is available. One-third of the LIFT rides are employment related.

## Program Partners

Since its inception in 2006 the Southwest Transit Team has had representatives from Grant, Green, Iowa, Lafayette and Richland Counties. The following agencies also participate in the Southwest Transit Team:

- Hodan Center
- Southwest Opportunities Center
- Southwest Wisconsin Regional Planning Commission
- Southwestern Wisconsin Community Action Program
- Wisconsin Department of Vocational Rehabilitation

## Program Funding

The LIFT program has utilizes several funding resources including the following grants:

- STRAP (Supplemental Transportation Rural Assistance Program) (2009, 2010)
- FTA Section 5316 (New Freedom) funding (2009, 2010, 2011, 2012)
- FTA Section 5310 (2012-present)
- Medicaid Infrastructure Grant (2010)
- Transportation Community and System Preservation funding (2013)

LIFT continues to receive mobility management funding from Section 5310 and uses some of the revenue from their HSV program contracts and volunteer driver hours to help supplement funding. The State of Wisconsin Department of Transportation (WisDOT) supports mobility management and regional transit coordination. WisDOT offers Section 5310 and Wisconsin Employment Transportation Assistance Program (WETAP) grants to support mobility management programs. WETAP supports long-term solutions by providing demonstration grants for transportation projects that connect low-income workers with employment.

In 2017, the South West Regional Planning Commission received a Section 5304 grant to conduct a study to help coordinate human services transportation. They are working with LIFT to increase shared rides in rural areas of their region. The Section 5304 grant is an FTA formula grant that provides funding for multimodal transportation planning. Planning must be cooperative, continuous, and comprehensive, resulting in long-range plans and short-range programs reflecting transportation investment priorities. These grants are managed by the state DOT or other local planning agency and vary by location.

## Program Highlights

LIFT has about 30 volunteers that drive their own vehicles providing on average 565 rides a month. LIFT's HSV service is mainly driven by staff drivers, but occasionally by volunteers, providing another 150-200 rides a month. LIFT's HSV fleet grew from one to van to six vans in

less than two years. LIFT continues to grow; in 2016 LIFT added two accessible vans with stronger and wider rear entry ramps and added a staff driver to their HSV program.

From December 2012 to August 2016 LIFT's ridership quadrupled, growing from serving 117 individuals to 360 individuals. In 2016, the volunteer driver and HSV programs averaged a combined 600 rides a month. In May 2017, LIFT provided 977 one-way passenger trips, 779 of which were provided by volunteer drivers.

ContinuUs recognized LIFT with an Outstanding Provider award in the third quarter of 2014 with recognition and \$300. The January 2015, ContinuUs Provider Bulletin recognized LIFT for their willingness to handle unexpected or unplanned transportation needs and short notice requests with friendliness and professionalism. ContinuUs is one of the Managed Care Organizations that LIFT contracts with to provide transportation services. LIFT uses both volunteer and paid staff to provide nonemergency medical transportation through their contract with ContinuUs as a third party. They use the revenue from this contract to reimburse volunteer drivers and pay for vehicles and staff. This income is also counted towards their Section 5310 Program match.

## **Program Challenges/Lessons Learned**

Lori Jacobson, Mobility Manager for Southwestern Wisconsin Community Action Program, provides the following advice about starting a volunteer driving program.

*"If an organization is interested in starting a volunteer driver's program the best advice I can give them is to do an assessment within their community to collect the data that will help them realize their unmet needs. A great resource for those starting would be to contact a Community Action Program in their area because CAP agencies do needs assessment surveys bi-annually. My other advice would be to collaborate with all transit agencies in the area as well as networking with existing volunteer driver programs.*

*Build a consortium with other transportation providers in your region. Collaboration with other agencies is a key to finding and closing gaps. Most of the agencies we collaborate with have to prioritize their transports so they mainly provide medical transports. That leaves a lot of unmet transports for work, school, social, and other needs. LIFT offers transportation for any need and mainly fills in the gaps. Also, most agencies are bound to provide transportation within their county or for a specific reason. LIFT is able to provide transportation from county to county, and even across state lines. Being a private non-profit and receiving 5310 funding helps reduce those restraints. Funding is always an obstacle, but be creative. Encourage donations, sponsors, and have a revenue source, like our Human Services Vehicles, to help support the volunteer driver program."*

## Section 8: State-Level Support for Mobility Management in Small Urban and Rural Areas

As noted in the introduction, this guide is also intended to support state DOTs and their work with funding sub-recipients. This section provides a sampling of how some states are involved in mobility management efforts. Information comes from responses to the on-line survey and research, and through the research team's work with several states on mobility management services.

### *Georgia*

- Georgia DOT funds mobility management activities undertaken by regional commissions (that in some cases operate rural transit systems) and Metropolitan Planning Organizations (MPOs).

### *Iowa*

- Iowa has a unique structure for mobility management. They have a network of coordinators spread out regionally across the state, with one Statewide Coordinator located at the Iowa DOT.
- Locally, connections are made with individual riders allowing for one-on-one attention and a more tailored service for each rider. Statewide, connections are made with other statewide groups to determine new programs or ways to collaborate.
- The statewide mobility coordinator works on big picture tasks like Non-Emergency Medical Transportation (NEMT) and Medicaid, discovering best practices for disabled workers and developing marketing and outreach

platforms to enhance the image of public transit.

### *Kansas*

- Kansas is divided into Coordinated Transit Districts (CTDs). They have established Mobility Managers (MMs) in two of the ten CTDs so far, and hope to grow the program in the next two years.
- Each MM is responsible for all agencies in their CTD, and works diligently with the public, government, and agencies to spread the word about transit services, assist travelers in transit education, develop PPPs to support their work, and work collaboratively with the other MMs in other CTDs.

### *Maryland*

- An on-line toolkit serves as a central repository for resources to support mobility management projects, and offers information on existing projects for use by other organizations in Maryland considering mobility management efforts. Facilitated by the Maryland Transit Administration (MTA), the toolkit also includes appropriate information for audiences outside of current mobility management projects who want to learn more about efforts and how they can become involved. The mobility management toolkit is provided through a website that also includes regional coordinated transportation plans for Maryland.
- The MTA hosted statewide workshops to raise awareness regarding mobility management strategies, and how these

efforts can help meet the increasing need for transportation options while using available funding efficiently and effectively. These workshops also provided the opportunity to provide training to current mobility management programs across Maryland.

- The MTA has facilitated funding applications to support local mobility management efforts, including a VTCLI grant for a county-based program.

## *Massachusetts*

- MassMobility currently has one staff member (with hopes to increase to two in the near future) who works closely with the Massachusetts Department of Transportation Statewide Mobility Manager to promote mobility management and coordination across the state.
- Efforts include sharing information about transportation best practices, encouraging and fostering regional collaborations, and providing technical assistance on mobility management projects around the state.
- The program originated when the Mobility Policy and Outreach Manager at the Human Service Transportation Office (who has since retired) saw an opportunity to better support mobility management around Massachusetts and applied for Jon Access and Reverse Commute (JARC) and New Freedom Program grants in 2010. This application was successful, and MassMobility began in 2011.
- Also in 2011, the Governor issued an Executive Order calling for the state Department of Transportation and

Health and Human Service agencies to work together to explore opportunities to improve the quality and efficiency of transportation for transportation-disadvantaged residents. Their findings led to MassDOT hiring a Statewide Mobility Manager, with whom we worked to set up regional coordinating councils around Massachusetts.

- These councils were staffed until the end of 2015. Some were taken on by local leadership and are still active. The state continues to provide technical assistance to these councils, as well as to other collaborative efforts.

## *Michigan*

- The Michigan Department of Transportation's (MDOT) Office of Passenger Transportation supports local mobility management efforts through federal and state funding, including the Shiawassee Area Transportation Agency (SATA) program profiled in the previous section of this guide.
- In 2016 MDOT and Michigan 2-1-1 conducted a Michigan Statewide Transit Study that included involvement and input from local mobility managers. The study resulted in ten regional mobility plans that contain an assessment of transportation needs, a demographic analysis, an inventory of current transportation services and resources. This report was used to prioritize strategies for improving mobility in each region.
- A Michigan Mobility Managers group conducts bi-monthly conference calls to discuss current efforts and share ideas between regions.

## *Mississippi*

- The Mississippi Department of Transportation supports six mobility managers that work in various regions throughout the state.
- The mobility managers serve as liaisons for transit providers, stakeholders and constituents throughout the state.
- Through a coordinated effort, they assist in coordinating services for the general public through transit providers within the state. These actions and supportive strategies are performed directly or in collaboration with others in order to provide a full range of travel options that are more effective in meeting the needs of the customers served.
- The mobility managers are responsible for improving business and community support for their transportation organization, as well as the region.

## *Nebraska*

- Nebraska is currently engaged in a statewide mobility management project to improve coordination and enhance transportation options. The project includes launching a number of "pilot projects" across the state to gather data and develop best practices that can be replicated in other areas of the state.
- The current effort is the second of its kind. The first project was initiated in 2009 and was funded by the American Recovery and Investment Act (ARRA). The state notes that it was basically an exercise in data collection regarding current service, gaps, and need. The

current project is focused on implementing solutions.

## *New York*

- New York State DOT conducted a two-day workshop to improve information and the resources available to mobility management programs at the local level, particularly to assist in their efforts to coordinate transportation services and to improve local mobility options. The workshop provided an opportunity for local mobility managers to discuss their programs and share ideas, and included training sessions on:
  - Helping human service agencies identify transportation costs and coordination opportunities
  - Identifying funding opportunities
  - Coordinated transportation planning and involving local stakeholders
  - Mobility management and ongoing supports/ expanding a program
  - Evaluating a mobility management program



## *Ohio*

- The Ohio Department of Transportation's (ODOT) Office of Transit provides resources to support mobility managers and local coordinated transportation planning efforts. Recently ODOT published the following three tools:
  - Coordinated Plan Template
  - Coordinated Plan Guidance
  - Coordinated Plan Tool Box

These resources are available at <http://www.dot.state.oh.us/Divisions/Planning/Transit/Pages/LocallyDevelopedCoordinatedPlans.aspx>

- ODOT published a Ohio Mobility Management Program Guide: <http://www.dot.state.oh.us/Divisions/Planning/Transit/Documents/Mobility%20Management%20Program%20Guide.pdf>

## *Pennsylvania*

- While PennDOT does not directly offer mobility management services, they support mobility management efforts through technical assistance and funding for well-defined projects in many areas of the state.

## *South Carolina*

- South Carolina reports that their mobility management services vary throughout the state, and are based on the needs and/or support within the region.
- They have charged the Councils of Government with the responsibility to assist with coordination efforts for their regions. There are one call centers,

volunteer driver programs, coordination services for some areas, and full coordination services for larger areas of the region.

## *Utah*

- When the Utah Transit Authority (UTA) was designated as the recipient for Section 5310 funds, a manager and intern were hired to begin the work of coordinated transportation.
- With monetary and visionary support from UTA, this department now has a manager, three full-time employees, one part-time employee and an intern to support the many mobility projects in process.
- The outreach of the Coordinated Mobility Department spans a number of communities along the entire Wasatch Front and Tooele County serving over 300 partner agencies.

## *Vermont*

- The Vermont Agency of Transportation contracts for a call center that provides information and connectivity to regional resources.
- All fixed routes are available in Google Transit and other trip planners including intercity.
- The state is working on some AVL projects for people to know where their bus is, and if it is running late or early. They are also working toward building a trip planner covering all modes.



## Virginia

- The Virginia Department of Rail and Public Transportation (DRPT) has supported local and regional mobility management practices, primarily through FTA Section 5310 and previously Section 5317 Program funding.
- DRPT facilitated a mobility management workshop that offered the opportunity to:
  - Provide both national and Virginia perspectives on mobility management efforts
  - Share information on your programs and lessons learned from interviews of Virginia's mobility managers
  - Provide information on some strategies that communities are using to expand mobility options
  - Discuss resources to support your program and opportunities to move your program forward
  - Allow mobility managers to network with each other.

## Wisconsin<sup>1</sup>

- The Wisconsin Department of Transportation (WisDOT) invested heavily in an intensive training program for mobility managers. An initial training was held in 2008, and subsequently a curriculum was developed and taught at conferences during the next three years. At the end of the second year, participants who had completed all of

<sup>1</sup> Information from Wisconsin Association of Mobility Managers website.

the curricula were tested and 18 received certificates.

- At the last conference in 2009 and at the first two in 2010, certified mobility managers, with guidance from WisDOT, created and then incorporated the Wisconsin Association of Mobility Managers (WAMM). Officers were subsequently elected and by-laws were formally adopted in the fall of 2010.
- WAMM sponsors ongoing events, including training conferences, to support local mobility managers. More information on these events, the certification program, and other resources is available at [www.wi-mm.org](http://www.wi-mm.org).

## Wyoming

- The Rural Transportation Voucher Program (RTV) and Transportation Mobility Coordination Program (TMC) continue to be administered in western Wyoming by Wyoming Services for Independent Living.
- A Program Manager serves consumers in Fremont and Sublette Counties as well as the Wind River Indian Reservation.
- A Rural Transportation Voucher (RTV) Program Specialist serves Sweetwater, Uinta, Lincoln and Teton Counties, and another position serves Big Horn, Hot Springs, Park, and Washakie Counties.



## **Section 9: Resources**

Beyond the resources noted throughout this guide, this section includes additional resources for implementing, improving, or expanding a mobility management practice in small urban in rural area. Each of the following resources are presented in the following pages.

- Successful Mobility Management Approaches and Strategies: Implementation Checklist
- Additional Mobility Management Practices
- Sample Documents and Templates
- Public Transit and Human Service Coordination
- Helpful Websites



# **Successful Mobility Management Approaches and Strategies Implementation Checklist**

<b>Community Outreach and Engagement</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Form Partnerships with Key Community Stakeholders</b>	<p><b>Successful mobility management practices seek and form partnerships with a variety of different stakeholders, to include:</b></p> <p><u>Transportation Providers</u></p> <ul style="list-style-type: none"> <li>• Public transit providers</li> <li>• Private transportation providers</li> </ul> <p><u>Planning Agencies</u></p> <ul style="list-style-type: none"> <li>• County and other local planning departments</li> <li>• Regional planning agencies</li> <li>• State-level agencies</li> </ul> <p><u>Passengers and Advocates:</u></p> <ul style="list-style-type: none"> <li>• Existing and potential customers, particularly targeted populations (individuals with disabilities, older adults, veterans, and people with lower incomes)</li> <li>• Advocacy organizations such as centers for independent living and transportation rider groups</li> <li>• Volunteer groups, community organizations, and foundations</li> <li>• Tribes, faith based groups, and organizations representing ethnic groups</li> </ul>

<b>Community Outreach and Engagement</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Form Partnerships with Key Community Stakeholders (continued)</b>	<p><u>Human Service Partners</u></p> <ul style="list-style-type: none"> <li>• Agencies that administer health, aging, housing, employment, or other support programs for targeted populations</li> <li>• Human service organizations that serve targeted populations</li> <li>• Job training and placement agencies</li> <li>• Housing agencies</li> <li>• Food banks</li> </ul> <p><u>Healthcare Providers</u></p> <ul style="list-style-type: none"> <li>• Hospitals</li> <li>• Healthcare centers</li> <li>• Doctor’s offices</li> <li>• Dialysis treatment centers</li> </ul> <p><u>Private Industry</u></p> <ul style="list-style-type: none"> <li>• Employers</li> <li>• Developers of new retail, residential, and educational facilities</li> </ul>

<b>Community Outreach and Engagement</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Form Partnerships with Key Community Stakeholders (continued)</b>	<p><u>Educational Institutions</u></p> <ul style="list-style-type: none"> <li>• Colleges</li> <li>• Universities</li> <li>• Private educators and child care providers</li> <li>• Local education departments/school districts</li> </ul>
<b>Promote Services to the Community</b>	<p><b>Successful mobility management practices market services to the community through a variety of methods. In addition, successful practices effectively communicate program outcomes to current and future funders and other stakeholders in a clear and concise manner.</b></p> <p><u>Methods to promote services and to communicate program outcomes include</u></p> <ul style="list-style-type: none"> <li>• Resource guides</li> <li>• Program websites</li> <li>• Presentations to community groups</li> <li>• Attendance at community events</li> <li>• Human interest stories</li> <li>• Newsletters</li> <li>• Annual reports</li> </ul>

<b>Community Outreach and Engagement</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Lead or Participate in Coordinated Transportation Planning Activities and Efforts</b>	<p><b>Successful mobility management practices lead or are heavily involved in coordinated public transit-human services transportation planning efforts, that include</b></p> <ul style="list-style-type: none"><li>• Hosting and facilitating coordinated planning meetings</li><li>• Maintaining inventories of transportation resources in their communities</li><li>• Providing input into priorities to be included in coordinated public transit-human service transportation plans</li><li>• Participating in or leading ongoing committees that meet to discuss transportation needs and coordination opportunities</li></ul>



<b>Needs Assessment and Program Design</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Determine Community Needs</b>	<p><b>Coupled with community outreach, successful mobility management practices are sensitive to community transportation needs and build their program around these needs.</b></p> <p><u>A variety of tools are used to determine community needs:</u></p> <ul style="list-style-type: none"> <li>• Surveys</li> <li>• Community workshops and meetings</li> <li>• Individual discussions with key stakeholders</li> </ul>
<b>Design Services to Meet Community Needs</b>	<p><b>Successful mobility management practices explore a variety of mobility management functions and transportation services to meet identified needs, to include:</b></p> <ul style="list-style-type: none"> <li>• One-call centers</li> <li>• Specialized transportation services for targeted populations, including people with lower incomes and older adults</li> <li>• Expanded public transit services to fit community needs</li> <li>• Travel training programs</li> <li>• Volunteer driver programs</li> <li>• Taxi voucher programs</li> </ul>

<b>Needs Assessment and Program Design</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Conduct a Comprehensive and Ongoing Community Needs Assessments</b>	<p><b>Successful mobility management practices conduct ongoing assessments of transportation needs in their community so they can effectively respond to changes and modify their programs accordingly.</b></p> <ul style="list-style-type: none"><li>• Similar to determining community needs the ongoing methods include surveys, outreach efforts, and discussions with key stakeholders.</li></ul>

<b>Program Evaluation and Assessment</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Assess and Evaluate Program Outcomes</b>	<p><b>In conjunction with ongoing needs assessments, successful mobility management practices establish methods for assessing the outcomes of their programs and communicating to appropriate decision makers and audiences.</b></p> <p>Methods include:</p> <ul style="list-style-type: none"> <li>• Reviewing and analyzing ridership, call volumes, program sign-ups, and other data</li> <li>• Customer and community surveys</li> <li>• Obtaining input from key community stakeholders</li> </ul>
<b>Use Quantitative Performance Measures</b>	<p><b>Successful mobility management practices establish methods for assessing the performance of their program that involve quantitative measures, in part because the benefits and outcomes of the program will need to be conveyed to different audiences:</b></p> <ul style="list-style-type: none"> <li>• Some stakeholders will want to see numbers related to transportation services provided through the practice, such as ridership reports and cost data.</li> </ul>

<b>Program Evaluation and Assessment</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Use Qualitative Performance Measures</b>	<p><b>Successful mobility management practices establish methods for assessing the performance of their program that also involve quantitative measures:</b></p> <ul style="list-style-type: none"> <li>• Some stakeholders will be interested in the impact of mobility management services on individuals in the community, and therefore will want stories and anecdotes that paint the picture of people who are directly benefitting from these efforts.</li> </ul>
<b>Assess Outcomes Through Connection to Established Goals and Objectives</b>	<p><b>In conjunction with development of performance measures, successful mobility management practices link the impact of their efforts to established goals and objectives.</b></p> <ul style="list-style-type: none"> <li>• Working with local stakeholders the goals and objectives for mobility management services are developed and updated regularly, and connected to quantitative and qualitative measures for evaluating outcomes.</li> </ul>

<b>Funding</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Use Federal Transit Funding Sources</b>	<p><b>Successful mobility management practices effectively use federal funding to initiate and support services and programs.</b></p> <ul style="list-style-type: none"> <li>• The FTA’s Section 5310 funds (and previous Section 5317) are typically the catalyst or foundation for a successful mobility management practice.</li> </ul>
<b>Explore Other Funding Opportunities</b>	<p><b>Beyond FTA programs successful mobility management practices explore other funding opportunities to sustain and grow their program.</b> Examples include:</p> <ul style="list-style-type: none"> <li>• Federal opportunities as they occur, such as the Veterans Transportation Community Living Initiative (VTCLI) grants</li> <li>• State-level programs that support human services transportation</li> <li>• Local government funding</li> <li>• As appropriate, passenger fares</li> <li>• Donations and sponsorships</li> </ul>

<b>Funding</b>	
<b>Approach/Strategy</b>	<b>Guidance</b>
<b>Build Their Program Incrementally Using Available Funding Resources</b>	<p><b>Through this survey, mobility management programs provided guidance on obtaining funding to initiate and sustain mobility management practices. This guidance recommended:</b></p> <ul style="list-style-type: none"> <li>• Developing funding for services one step at a time</li> <li>• Building operations as funding is obtained</li> <li>• Showing the value of services, in terms of quality of life or livability measures and/or how the services are enabling greater access to community resources more efficiently</li> <li>• Talking with partners and state staff from the departments of transportation, health and human services, housing or other departments to learn what options exist for funding both the interim activities and the actual services</li> </ul>
<b>Use Volunteers and Other In-kind Support</b>	<p><b>Limited transportation dollars can be stretched to serve many more trips through the use of volunteer drivers and/or office staff.</b></p> <ul style="list-style-type: none"> <li>• Volunteers can be an ongoing source of support as well as start-up support while the program is incrementally being built.</li> </ul>

# **Additional Mobility Management Practices**



Agency	Contact Person	State	FTA Region	Practice Description
<b>COAST Public Transit</b>	Jeff Donald Community Transportation Manager	NH	1	The regional transit agency hosts a mobility manager and 2 call takers. The mobility manager works on trying to encourage human service and transportation agencies to move to centralize their call taking, provide travel training, oversee a small coordinated NEMT program, and on trying to help transportation providers of all types find ways to save money, either in how they provide services or how they manage back-end functions.
<b>The Arc of Schuyler</b>	Amber Simmons Mobility Manager	NY	2	Our mobility management service involves a full-time mobility manager and part-time coordinator. The Mobility Manager supervises the one-call center and works to address unmet transportation needs and educate target populations about available transportation services. She spends about 25% of her time working on regional transportation projects that are dedicated to improving cross-county transportation for employment and medical appointments. The coordinator handles the daily operation of the one-call center. In 2010, the call center started with the need to coordinate transportation efforts and NEMT rides. The Mobility Manager assisted with the startup of transit in our county. It has since grown into a one-call center coordinating transit, volunteer transportation and a county van operated by the Office for the Aging. It

<b>The Arc of Schuyler (continued)</b>				has grown into a regional effort and the mobility manager has been shared with a neighboring county to assist with various projects.
<b>Delmarva Community Services Inc.</b>	Mary Handley	MD	3	Our mobility management program exists within a "One Stop Service Center" It consists of a team of travel trainers each with an additional human services specialty: aging, Hispanic outreach, veterans and financial sustainability. It operates 4 satellite offices, one in each county we serve to assist in coordinating transit options. We are finalizing completion of a Veterans Transportation and Community Living Initiative (VTCLI) one-call one-click center to serve veterans and their families in 8 rural counties.
<b>Central Pennsylvania Transportation Authority (CPTA)</b>	Sherry Welsh Specialized Transportation Project Manager	PA	3	We have, for many years, focused on mobility planning and having a regional call center and a mobility planning staff that works one-on-one with customers. Our higher level mobility management program is not fully actualized yet. We now have an MSW employed as a part-time shared ride manager who focuses on mobility management. We hired an LSW and PhD of Social Work. A social work background allows the focus to be client- centered. I spend about 90% of my time on mobility management projects and expansion.

<p><b>Area Agency on Aging Healthy Generations</b></p>	<p>Denis P. Paddeu Mobility Manager</p>	<p>VA</p>	<p>3</p>	<p>The Mobility Options program is overseen by a full-time mobility manager with two full-time assistants that oversee a diverse, one-stop-shop Human Services Transportation Program which includes NEMT, subscription trips, a part-time travel trainer works with the local fixed-route system, fuel debit card distribution and a volunteer driving program. Mobility Options sees itself as the preeminent transportation clearinghouse in the region.</p>
<p><b>New River Valley Senior Services</b></p>	<p>Chris Blankenship Mobility Coordinator</p>	<p>VA</p>	<p>3</p>	<p>Our mobility management service is a regional one-call center that involves one person who takes calls Monday – Friday, using a notebook to gather information and relay information about available services when answering calls. This staff member calls vendors and volunteers to schedule transportation, recruit, train, and retain all volunteers; does the marketing and all educational presentations; and secures funding sources including match funding.</p>
<p><b>Senior Connections</b>  <b>The Capital Area Agency on Aging</b></p>	<p>Tony Williams Mobility Manager</p>	<p>VA</p>	<p>3</p>	<p>Senior Connections is the regional transportation coordination entity in Planning District 15 of the Commonwealth of Virginia. We provide medical transportation services to people ages 60+ and people of all ages with disabilities. We have two ride counselors who receive calls from 9:00 a.m. -5:00 p.m. weekdays. Some clients do not pay for transportation services; others pay on a sliding scale. We provide referral services for persons for whom we</p>

<b>Senior Connections (continued)</b>				cannot schedule rides, as well as ride counseling through a senior center affiliated with our agency.
<b>Senior Services of Southeastern Virginia</b>	Randy Nimmo	VA	3	Our mobility manager serves as the coordinator for transportation and is setting up a Volunteer Driver Program. We have started a Voucher Program and are working to find services that will offer a set rate for repairs, insurance, and training for all members of the collaborative.
<b>City of Tallahassee-StarMetro</b>	Andrea Rosser Special Transportation Manager	FL	4	Our mobility management program involves a single travel trainer who meets with individuals and groups weekly to develop travel plans, organize group outings, train Transit Ambassadors, recruit for the volunteer driver program and gather and give out information on public and private transportation services in the capital region. We also maintain an online version of a mobility resource guide.
<b>Collier Area Transit/MTM Inc.</b>	Maylin Hernandez	FL	4	Our mobility manager position wears several hats. First she spends time meeting with individuals in the community to encourage travel training. Travel training allows passengers to establish some independence. She conducts evaluations to ensure passengers who are applying for the paratransit service are qualified. She conducts assessments and follows up on expiring paratransit candidates.

<p><b>Florida State University (FSU)/Safe Mobility for Life Coalition</b></p>	<p>Katie Arnold</p>	<p>FL</p>	<p>4</p>	<p>Our mobility management service includes FDOT-funded outreach and research on older driver needs and resources available through collaboration with Safe Mobility for Life Coalition partners. The FDOT and FSU efforts are data driven and research based, which allows resources to be directed to specific locations and populations throughout the state. FDOT resources have been heavily used within Florida and duplicated in other locations throughout the US. The goal of the Safety Office is to bring crash rates down for people over age 65, which is in alignment with the state's strategic safety plan and supports positive and proactive options for Floridians in both urban and rural settings.</p>
<p><b>Lake County Board of County Commissioners</b>  (Lake County Connection)</p>	<p>Tomika Monterville Transit Manager</p>	<p>FL</p>	<p>4</p>	<p>Our mobility management service involves a contracted service provider taking calls between 8 a.m. and 5 p.m. They are responsible for managing the service. Our Transit Program Specialist conducts oversight for the contracted provider and responds to policy concerns related to eligibility, facility concerns, passenger wait times, and travel for the training program development.</p>

<p><b>Three Rivers Regional Commission</b></p>	<p>Mamie Tomys Contracts Administrator</p>	<p>GA</p>	<p>4</p>	<p>Our Mobility Manager works to improve quality between providers and the transit system and to incorporate an understanding of the direct needs for service transportation among communities and county. Our service has been very effective in the community and has provided service to over 60% of the county’s population. Elderly people or those with a disability can now use public transit to get out for social, medical, educational, nutritional and personal needs.</p>
<p><b>Natchez Transit System</b></p>	<p>Lovie Martin Regional Mobility Manager</p>	<p>MS</p>	<p>4</p>	<p>As a Regional Mobility Manager, I attend monthly meetings with local and state officials as well as give public presentations to area counties about transportation needs in Southwest Mississippi. I have 13 counties that I represent. I attend health fairs within my regional area. My office is located at the regional hub station, so I have an opportunity to talk with people daily.</p>
<p><b>Northeast Mississippi Community Services/ Ride the Smile Regional Group</b></p>	<p>Jeremy Hare Regional Mobility Manager</p>	<p>MS</p>	<p>4</p>	<p>Our mobility management service involves a single mobility manager. He conducts regional meetings with agencies in his region, works to coordinate trips, and advertises the services within his region to anyone that needs them. He attends meetings throughout the region with elected officials to solicit more funding and services.</p>

<b>Jackson County Transit</b>	Kim Shuler Mobility Manager	NC	4	Our Mobility Manager concentrates on educating the community about transit services. She meets with groups and individuals. She also does radio programs and promotes the agency through local fairs throughout the county. She assists with coordination with neighboring counties to meet the transportation needs of all of western North Carolina.
<b>Area Agency on Aging 1-B</b>	Roberta Habowski	MI	5	Our mobility management service, myride2, is a one-call, one-click service to find transportation options that best fits rider's needs. We have one Mobility Project Manager and 2 full-time Mobility Specialists who answer calls on a toll-free line. Information is also available on our website, <a href="http://www.myride2.com">www.myride2.com</a> where people can search for providers based on their zip code, request a ride, and find information on older driver safety and how to ride the bus. We have a provider data base on our website and in Excel. Our Mobility Manager manages myride2 and also attends transportation and community meetings, seeks out funding, and advocates for coordinated transportation planning. We have recently received a grant that will enable us to add travel training as a service, and will have one part-time Project Coordinator. We are developing a partnership with SPLT Rides utilizing Lyft to schedule rides through myride2 without using an app.

<b>Benzie Transportation Authority</b>	Jessica Carland	MI	5	Our mobility management service consists of a single mobility management manager who works for our agency. She visits local senior centers, churches, schools, and nursing homes in order to educate the public about our services and answer questions. She also works on developing new services in order to increase ridership.
<b>Clinton Area Transit System</b>	Gale Capling	MI	5	Our mobility management service involves a single mobility manager who works in our agency. All tasks involving NEMT and the volunteer drivers are her responsibility. She arranges a means to transport seniors and disabled folks to medical services outside of county lines. The aging population in our county has limited access to care. The program uses volunteers that assist travelers to get to their appointments. This mini volunteer army reduces costs of the program enabling more services to be given to a greater number of people.
<b>Clinton Area Transit System</b>	Dawn Benson General Manager	MI	5	Our mobility management links passengers with medical services through transportation using a volunteer driver program and public transit minivans. Scheduling trips and drivers makes up a portion of the work. Networking with social service agencies and community partners further aids in locating volunteer drivers and passengers in need of medical transportation services.



<b>Pioneer Resources</b>	Tina Houser	MI	5	Our mobility management service consists of the Lakeshore Ride Link (a website). This website increases vital access to transportation resources through education, advocacy and collaboration of resources to ensure a good quality of life for members of our community. Area agencies come together between several different counties.
<b>The Rapid</b>	Sarah Green	MI	5	Our Travel Training program is located in the Specialized Services department of our Transit agency. We have a one full-time and one half-time Travel Trainer who work one-on-one with individuals with disabilities, provides group familiarization, and 'train the trainer' outreach to social service and health care agencies and LEP populations. Presentations include Active Transportation and 'Bus 101', coordinated without external communications department. We also have 3 senior mentor volunteers who help familiarize seniors with new transit options.
<b>Southwest Michigan Planning Commission</b>	Debra Panozzo Mobility Manager	MI	5	As a Mobility Manager, I am the person behind the web site, responding to questions from individuals, trying to get places and staff that work with people with transportation problems. I work with 7 transit agencies, many human service providers and NEMT clients.

<p><b>United Community Action Partnership</b></p>	<p>Shelly Pflaum Access Coordinator</p>	<p>MN</p>	<p>5</p>	<p>Our mobility management effort is multi-faceted. It includes one-on-one trip solutions; a regional ride council made up of transportation stakeholders across many disciplines; a return ride NEMT program in one local hospital that is in the process of expanding to two more medical facilities; a travel training program, a rider companion program to encourage more use by our elderly and people with beginning stage dementia; volunteer driver training; and looking into ways to make vehicle sharing more possible.</p>
<p><b>Area Agency on Aging 3</b></p>	<p>Erica Petrie Mobility Manager</p>	<p>OH</p>	<p>5</p>	<p>Our mobility management effort has two main components. First, a regional transportation call center that gives out transportation options and a Find A Ride program that sets up and pays for rides for older adults and people with disabilities when no other community options exist. The second component is working with the community to develop more transportation resources and coordinate existing resources.</p>
<p><b>Catholic Social Services of the Miami Valley</b></p>	<p>Michelle Caserta Mobility Manager</p>	<p>OH</p>	<p>5</p>	<p>Mobility Manager for Catholic Social Services has 3 counties: Champaign, Darke and Shelby Counties. RideLink is an informational call-in center where individuals can call in and receive information about affordable, reliable transportation options for the county they live in. The Mobility Manager also trains drivers in Defensive Driving and Driver Training. The</p>

				major focus for 2017 is updating the Human Services Coordinated Transportation Plan in all 3 counties.
<b>Community Action Committee of Pike County (CAC)</b>	Amanda Elliott Mobility Management Specialist	OH	5	<p>Our mobility management service involves a single mobility manager who works in our agency. She spends about 50% of her time meeting with social service agencies. The Mobility Manager accesses area employers through the CAC Employment and Training Department whose staff has personal contacts with employers. The Mobility Manager attends Chamber of Commerce meetings as well as Pike County Community Fund meetings to access area development and business people. The Mobility</p> <p>Manager participates with a booth at fairs and events in the area and serves on the Pike County Human Service Council where she is currently secretary. The Human Service Council meets monthly and provides access to and relationships with human service agencies in Pike County and the surrounding area as well as local elected officials. The Mobility Manager has on-going contact with funding organizations such as the Area Agency on Aging and Pike County Community Fund.</p>
<b>Community Action Wayne/Medina</b>	Leslie Baus Mobility Coordinator	OH	5	Our Mobility Manager is trying to develop transit services in a county that has none. It was developed in 2014 when Wooster Transit, a small limited fixed-

				<p>route system wanted to apply for FTA funding to purchase a wheelchair accessible vehicle. It was determined that a Mobility Manager was needed as well as a coordinated transportation plan, so funding was secured to get both. Wayne County has no transit. There is a small fixed-route system in the City of Wooster that is privately funded and not getting help from the city because they are afraid that someone not from Wooster will use the system (paid for by Wooster income tax dollars). The county commissioners do not feel that transit is a concern of theirs and will not fund it. The Mobility</p> <p>Manager has been working for the past 2 years to overcome this mindset and build momentum from other sectors of the community.</p>
<b>Hocking – Athens - Perry Community Action</b>	Jessica Stroh	OH	5	We are a single point of contact. We identify gaps; develop, implement, and evaluate transportation projects; and provide education, outreach and travel training.
<b>Transportation for Logan County/ RTC Industries, Inc.</b>	Tamara Blakely Mobility Manager	OH	5	Our mobility management consists of a single mobility manager. She spends about 50% of her time meeting with social services agencies and elderly and disabled clients to assess them for the correct transportation options. She spends approximately 25% of her time meeting with social service agencies and senior living facilities to keep communications ongoing and 25% of her time updating transportation information and speaking about these different services. The mobility manager is under the
<b>Transportation for Logan County/</b>				

<p><b>RTC Industries, Inc. (continued)</b></p>				<p>operation of RTC Industries/ Employment Services. This is the county non-profit agency that works with and finds employment for persons with disabilities. The effort has been successful. More and more people in the community are learning and using the county transit agency and the number of trips is greatly increasing. A lot of this increase is due to outreach to elderly residents of the county. This past year showed over 24,000 trips and over 340,000 miles for the transit agency alone. 70% of these trips are for persons ages 60+.</p>
<p><b>WSOS Community Action, Inc.</b></p>	<p>Todd Robinson Mobility Coordinator</p>	<p>OH</p>	<p>5</p>	<p>Our Mobility Manager is involved 100% in mobility management practices that target senior citizens, individuals with disabilities, and low-income representatives in the community. The Director of Public Transportation and Senior Programs allocates 35% of their time facilitating stakeholder meetings in multiple counties. The Mobility Specialist spends 50% of the time working with the Mobility Coordinator on goals and strategies of each county coordinated public and human services transportation plan.</p>
<p><b>Barron County Office on Aging</b></p>	<p>Jennifer Jako Transportation Manager</p>	<p>WI</p>	<p>5</p>	<p>Our service involves a dispatcher who takes calls and schedules 3-4 vans. State of Wisconsin grant 8521 and grant 5310 to fund a service that can help older adults and persons with disabilities get their rural transportation needs met with priorities for medical</p>

				appointments nutrition-related needs, and employment.
<b>Barron County Developmental Services Industries (BCDSI)</b>	Lynnea White Program Manager	WI	5	Our mobility management service is a route based system where individuals with disabilities are picked up from their homes and brought to a centralized location for the purpose of developing daily living and work skills. They are returned home at the end of each day. This service provides individuals with disabilities the opportunity to engage in employment. BCDSI currently serves approximately 40 individuals.
<b>Black River Industries</b>	Amber Fallos Director	WI	5	We utilize one Mobility Manager that schedules routes and individual transportation for people with disabilities and senior citizens. We also provide daily routes for people to access the community and employment from their homes.
<b>Community Alternatives, Inc.</b>  <b>Community Alternatives, Inc.</b>	Julie Miller	WI	5	Our mobility management system involves coordinating transportation for approximately 50 people with disabilities; 8-10 of whom require handicap accessible transportation. We currently have 3 older used vans and one 15 passenger shuttlebus. We work with Shawano City/County Transportation Committee to utilize transportation options for people. The current vans have broken

<b>(continued)</b>				down and had numerous repairs, but we were awarded a new grant vehicle. We work with Menominee Transit and City Cab (Special Vouchers) to coordinate transportation for our members.
<b>Diverse Options, Inc.</b>	Allen R. Schraeder	WI	5	Our mobility management system coordinates transportation for individuals with intellectual, developmental and physical barriers to work, attend day programs and live independently in the community.
<b>East Shore Industries, Inc.</b>	Tracy Nelson CEO	WI	5	Our mobility management service involves multiple individuals that maintain a fleet of vehicles and coordinate transportation for daily routes to our facility and routes into the community for programming.
<b>Endeavors Adult Development Center, Inc. (ADC)</b>	Kathleen S Clark Director	WI	5	Our mobility management service involves one mobility manager who coordinates 8 daily routes, and schedules daily appointments with drivers. She spends 70% of her time with this coordination. Endeavors ADC employs one dispatcher who dispatches drivers for appointments, schedules vehicles for maintenance and repairs, and orders parts. He spends 70% of his time doing these tasks.

<b>New Hope Center</b>	Lisa Herrick Administrative Assistant	WI	5	Our mobility management service provides transportation for adults with disabilities to and from their places of employment.
<b>North Central Health Care</b>	Jenny McKenzie	WI	5	Our mobility management services work primarily with elderly and developmentally disabled populations to coordinate routes to sheltered workshops as well as the s85.21 Grant (Specialized Transit Program Wisconsin DOT) demand transportation for the county.
<b>Sunshine House Inc. (SHI)</b>	Karen Leitzinger Transportation and Safety Manager	WI	5	Our Mobility Management Manager works at Sunshine House Inc. She coordinates transportation for our employees with disabilities getting them to and from work at SHI. She works with the county and Door-Tran (the Door County Transportation Consortium) filling the gap in transportation providing public transport to medical appointments, work, and church, and provides wheelchair transport to and from neighboring counties for appointments when needed. She handles all of the paperwork and record keeping for transportation at SHI.
<b>VIP Services, Inc.</b>	Cynthia Simonsen Executive Director	WI	5	The mobility management position has been established within the last month and is funded through the county to increase transit services within Walworth County.



<b>Milwaukee County Transit System</b>	Chris Fox Mobility Coordinator	WI	5	We have two Mobility Managers who focus on promoting and expanding travel training efforts. Our team conducts roughly 50-60 outreach presentations per year at schools, senior centers and refugee resource centers. Our New Freedom grant allows us to improve bus stops that are not ADA compliant. There was a need to reduce the costs of paratransit and there was an opportunity to improve our fixed-route ridership by making the system more accessible and teaching people that the fixed-route was more spontaneous and affordable.
<b>Rusk County Transit Commission</b>	Sheryl Kisling	WI	5	We have one Mobility Manager that works daily within the transit agency. This person works in close contact with a travel trainer and public transit department heads to trouble shoot mobility issues of new and aging riders, transportation promotion and accessibility.
<b>Shoreline Metro/ (City of Sheboygan)</b>	Derek Muench Director of Transit and Parking	WI	5	Our mobility management service involves a group of educated and qualified employees that dedicate time to educating and teaching customers to use public transportation and provide assistance as bus buddies to enhance an individual's ability to learn the public transit system. Shoreline Metro developed a Busy Buddy and Travel Training program in 2012. It was further enhanced with Google Transit Trip Planning in 2013. The program includes group training, one-on-one training and on-board assistance in educating customers and equipping them with the ability to use

<p><b>Shoreline Metro</b>  (City of Sheboygan)  (continued)</p>				<p>public transportation. The program has increased the mobility of many individuals over the 4+ years. The program is dedicated to the customer and training is not complete until the individual can use public transit on his/her own. The program is open to anyone with access to the service. It is intended to allow individuals to regain mobility freedom by using public transportation in a situation where otherwise they would not have transportation service.</p>
<p><b>Center for Independent Living for Western Wisconsin, Inc.</b></p>	<p>Denise Larson Regional Mobility Manager</p>	<p>WI</p>	<p>5</p>	<p>Our mobility management project is an 18 county regional one-call center with multiple community stakeholder partnerships for coordination of services including; Aging and Disability Resource Centers, Family Care Organizations, Department of Vocational Rehabilitation, Crisis Stabilization Homes, and Veterans Organizations. The center's transportation mobility management program has grown to one of the largest in the nation covering 18 mostly rural counties of northwestern Wisconsin. The center provides rides to over 3,000 riders each year. The average trip is over 40 miles. Riders are given trips with volunteer drivers (100 drivers) to medical, employment, education and training, nutrition, personal business and other events to help them remain independent and living in their own homes. The mobility manager works hard to coordinate services with other providers to assure there are no duplication of services.</p>

<p><b>Lutheran Social Services of Wisconsin and Upper Michigan Inc.</b></p>	<p>Holly Keenan Mobility Manager</p>	<p>WI</p>	<p>5</p>	<p>Our mobility management service involves a full-time Mobility Manager that over sees two Transportation Coordinators. Staff manages a regional transportation call center that provides information, assistance, and mobility counseling. Our program manages a volunteer driver program that services a three-county area. The Mobility Manager manages a travel training program which uses volunteers as bus buddies to provide one-on-one instruction using the public bus.</p>
<p><b>Southwestern Wisconsin Community Action Program, Inc.</b></p>	<p>Ashley Nedeau Owen Director of Transportation Development</p>	<p>WI</p>	<p>5</p>	<p>Our mobility management service involves 3 Mobility Managers who manage Work ‘n’ Wheels (a zero interest vehicle purchase program) and LIFT (a volunteer driver program), a Human Service Vehicle program, a one-call one-click service, travel training and driver training. We are a referral-first agency and maintain a list of and coordinate with all providers in the region and fill in the gaps by providing more than 800 trips monthly across 9 counties. We host a weekly community bicycle ride from May through September. We provide travel training to individuals aging out of school programs in 5 counties. Our transportation service is door-through-door and operates every day at any time. One-third of our rides are to or from work for any shift. We offer training for volunteer and staff drivers for every agency in the region at least once a year. Our Mobility Managers are active in our state mobility manager association, WAMM (Wisconsin Association of Mobility Managers) with 2 Mobility Managers currently</p>

				<p>serving on the Board of Directors. All 3 actively advocate for improved access and service to individuals who are transportation disadvantaged.</p>
<p><b>Greater WI Agency on Aging Resources, Inc.</b></p>	<p>Carrie Porter</p>	<p>WI</p>	<p>5</p>	<p>Our mobility management service is a state-wide technical assistance service that helps distribute information and connect potential partners to create solutions.</p>
<p><b>Maritime Metro Transit</b></p>	<p>Linda Grider Mobility Manager</p>	<p>WI</p>	<p>5</p>	<p>Our Mobility Management Project is a cooperative effort between Maritime Metro Transit and the Aging and Disability Resource Center of Lakeshore - Manitowoc County to coordinate transportation needs, services and programs through several public and private organizations in Manitowoc County. The Mobility Manager position is funded through the federal Section 5310 (Enhanced Mobility for Seniors and Individuals with Disabilities) Program, awarded through the Wisconsin Department of Transportation. The Mobility Manager engages in management activities with private providers to plan and implement coordinated services to ensure that disadvantaged target groups have access to transportation service they need in a cost-effective and efficient manner.</p>

<b>Aging and Disability Resource Center (ADRC) of Columbia County</b>	Sarah Millard Transportation Coordinator	WI	5	Our mobility management service is a government agency that has one person taking calls and setting up rides with the government service or referring them to another provider to accommodate the caller's needs. The same person also does outreach in the area to promote their transportation program.
<b>Clark County Department of Social Services</b>	Suzanne Lindenman	WI	5	Our mobility management service involves a shared ride taxi through the federal Section 5311 program and a Volunteer Driver Program through the Wisconsin DOT s85.21 grant program. Our coordination plan was first set in place in 2009.
<b>Marinette County Health and Human Services Department (HHSD)</b>	Glenn Sartorelli Deputy Director	WI	5	Our mobility management services involve a Transportation Coordinator who works in our agency to provide transportation to individuals with disabilities and seniors ages 55+. The coordinator is responsible for scheduling, transporting, recording and reporting transportation trips for Marinette County HHSD consumers.
<b>Marquette County</b>	Adam Sengbusch	WI	5	Our mobility management service is for county residents. We have volunteer drivers and sub drivers. We also have a driver that drives 30 hours per week. I manage the service Dispatch and Drive.
<b>Shawano County Department of Human Services</b>	Heidi Russell Director of Aging	WI	5	We contract with Menominee Indian Tribe of Wisconsin (MITW) for our bus services. They have a Mobility Manager who works to make sure the individual has a ride which meets their needs. We use

<p><b>Shawano County Department of Human Services</b>  (continued)</p>				<p>a volunteer escort service which is manned by a support staff that coordinates the rides. It is very rare that an individual cannot obtain a ride. We use the reduced fare taxi ticket program for more independent individuals who reside within the city. Anyone unable to be served is directed to the Director of Aging (myself) and I work to fill the need. It is very rare that this happens. We are also working with the East Central Wisconsin Regional Planning Commission for the evaluation of a multi-county mobility manager position for individuals to contact should we be unable to fulfill their need.</p>
<p><b>Walworth County</b></p>	<p>Al Stanek Mobility Coordinator</p>	<p>WI</p>	<p>5</p>	<p>A single county Mobility Coordinator" grant management for state-funded specialized transit service and a federal Section 5311 funded Shared Ride taxi system.</p>
<p><b>Atomic City Transit</b></p>	<p>Annette Granillo Transit Manager</p>	<p>NM</p>	<p>6</p>	<p>Our mobility management service consists of a dispatcher/customer service representative providing scheduling, and fixed-route, paratransit and dial-a-ride information for the local area and regional connections.</p>
<p><b>New Mexico Aging and Long Term Services Department (NMALTS)</b></p>	<p>Anthony Futch Program Manager</p>	<p>NM</p>	<p>6</p>	<p>Our mobility management resides with our state contractors and sub-contractors who provide transportation and other services to seniors and individuals with disabilities statewide.</p>

<p><b>Rural Economic Assistance League, Inc.</b></p>	<p>Martin Ornelas Director</p>	<p>TX</p>	<p>6</p>	<p>Our mobility management services involve mobility managers who on a regular basis meet with target groups and present information on available travel services, conduct travel trainings and facilitate accessing travel reservations system. There are 2 mobility managers, who each spend 50% of their time on this. These efforts are augmented with public education efforts in the nine-county service region. One of the mobility managers spent 50% of their time on mobility management efforts targeting dialysis service users that are transit dependent. She works with dialysis facilities and dialysis users, and creates specific travel plans to meet their travel needs during the week, on weekends and during most major holidays (except Christmas Day and Thanksgiving Day as dialysis facilities are all closed on those two days). The dialysis mobility management services are available in the region and are developing a regional dialysis transportation plan for transit dependent and non-transit dependent dialysis users.</p>
<p><b>EARL Public Transit/Northeast Iowa Community Action Cooperation (NEICAC) Iowa DOT</b></p>	<p>Sam Castro Mobility Manager</p>	<p>IA</p>	<p>7</p>	<p>We have 1 Mobility Manager at our agency who works on community outreach via presentations to civic and other groups, radio and media interviews. He (myself) is also working on creating a network of partnerships with many human service agencies and businesses to be able to provide improved and new services to underserved populations. He is currently working with his regional planning commission on the best ways to fill gaps in services for our rural</p>

				<p>areas, of which there are many. We are using design thinking methodology and are in the very preliminary stages of the process.</p>
<p><b>HIRTA Public Transit</b></p>	<p>Julia Castillo Executive Director</p> <p>Sarah Constable Rural Central Iowa Mobility Coordinator</p>	IA	7	<p>Our Mobility Management service consists of a single Mobility Coordinator providing services within our seven-county region, and also coordinates with the 8 Mobility Coordinators within the state. Her time is spent educating the community, marketing services, travel training, facilitating county TAG's, coordinating with human service agencies, assisting with development of new programs and grant writing.</p> <p>Our Mobility Coordinator is able to make connections within the community through attending human service agency meetings, education and health events, that our transit agency, with limited staff, would not have the time to do. This has allowed us to add new services, receive grant funding and develop partnerships. We are meeting more needs in the community, serving additional populations, and creating a higher public image for our transit system, which has increased ridership.</p>
<p><b>HIRTA Public Transit (continued)</b></p>				



<p><b>Linn County Transportation Advisory Group</b></p>	<p>Terry Bergen</p>	<p>IA</p>	<p>7</p>	<p>Our mobility management service involves a single Mobility Coordinator who is an employee of Linn County, working on behalf of all local transportation providers, non-profit agencies and citizens in our area. He answers a phone line (365-RIDE) where people can call for assistance with transportation challenges, coordinates our website (365ride.org) and social media efforts, meets with local partners and clients to develop outreach and educational programs, creates ideas/solutions for gaps in our transit system and looks for funding availability to support our projects.</p>
<p><b>Regional Transit Authority</b></p>	<p>Ken Voorhees Mobility Coordinator</p>	<p>IA</p>	<p>7</p>	<p>Our mobility management service involves a single Mobility Manager who works in our agency. He meets with social service agencies and clients ensuring their travel needs are being met. He works with volunteer drivers ensuring they have the support needed, and he promotes transit in the community. Clients rely on our service to get to work, workshops, day-hab and medical appointments.</p>
<p><b>Siouxland Regional Transit System</b></p>	<p>Dawn Kimmel Mobility Manager</p>	<p>IA</p>	<p>7</p>	<p>Mobility management was funded in our area for just over 4 years. While no longer independently funded, the regional transit office has assumed the responsibilities previously conducted under a specified grant and corresponding local match. Current attention to mobility management within transit is less than 5% of the activity directed toward resolving transportation barriers. Dispatch will</p>

<p><b>Siouxland Regional Transit System (continued)</b></p>			<p>sometimes refer to a private carrier when needs cannot be met by Siouxland Transit, or will direct a caller to apply for services they are currently not using. Preceding January 1, 2017, mobility management responsibilities were directed through the Transportation Advisory Group (TAG) for DOT Region 4 in Iowa. Primarily, the Mobility Manager helps people resolve transportation barriers by providing information on available transportation providers as well as system supports that are in place, such as Medicaid NEMT, waiver programs, agency specific programs, and emergency funds. Also, the MM can provide travel training. The mobility management maintains a current data base of private providers and a working relationship with both the regional system serving small, rural areas and the small urban city transit system. Approximately 50% of time was dedicated to one-on-one solutions based on referrals, inquiries and directly received calls. The other 50% of time was split at varying levels (depending on what was available at any given time) on:</p> <ol style="list-style-type: none"> <li>1. Professional practices training/development;</li> <li>2. Outreach to human services and medical provider offices;</li> <li>3. Private provider contacts;</li> <li>4. Direct education to non-driving communities (usually affiliated with Senior centers/services, low-</li> </ol>
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				<p>income/senior housing/nutrition programs) by way of “Transportation Conversations”; and</p> <p>5. Attempts to draw employers into the discussion of solving transportation barriers for potential employees.</p>
<b>OCCK Transportation</b>	Michelle Griffin Mobility Manager	KS	7	<p>I am a single Mobility Manager for an eight-county region. I am brand new to the job, and to the field and I don't have a lot of guidance on what to do. I have just been starting talks with people about what I do and what services are currently available in the region. My position is 100% funded by a grant from the state DOT and came from their business model for the state.</p>
<b>Roaring Fork Transportation Authority (RFTA)</b>	Angela Henderson Assistant Director- Project Management and Facilities Operations	CO	8	<p>RFTA is made up of 8 local jurisdictions and we have planners that work with each individual jurisdiction to address their specific mobility needs. We have partnered with a company called WeCycle to get bike systems at some of our BRT stations to cover the last mile of our commuter transportation needs. We have a senior van program that works with the elderly in each county. We have set our services up to accommodate low income areas and have recently added a discount program for veterans. We look to address all areas of our valley's mobility needs.</p>

<b>Seniors' Resource Center</b>	Hank Braaksma Transportation Director	CO	8	I view the agency as a mobility management service as we coordinate funding, providers and volunteers under a single point of entry. We started as a county-based Medicaid pilot program to coordinate service. This is now a Colorado model for the Denver area. We continue to broker and blend funds to maximize dollars and capacity. We are helping folks who cannot access public transportation or need a higher level of service. Door-to-door and door-through-door is our standard.
<b>Northern Arizona Intergovernmental Public Transportation Authority (NAIPTA)</b>	Kate Morley Mobility Planner	AZ	9	NAIPTA has a Mobility Planner who is responsible for applying for and reporting on grants to fund services: 10%; developing relationships with human service agencies and other entities with an interest in transportation on programs to address gaps: <ul style="list-style-type: none"> <li>▪ Reviewing and improving existing programs to be more effective</li> <li>▪ Staying current on trends and possible solutions to gaps</li> <li>▪ Managing Coordinated Council and other public input</li> </ul>

				<ul style="list-style-type: none"> <li>▪ Writing plans such as coordinated plan, vanpool plan, bike share plan, and service area plans</li> </ul>
<b>Riverside Transit Agency</b>	Lisa Almilli Mobility Manager	CA	9	Our travel training program provides training to people with disabilities, veterans and older adults to use the fixed-route service. Training is available in groups or individually, depending on need.
<b>Catholic Community Service</b>	Sidney Williams NTS Regional Coordinator	AK	10	Our mobility management service is a local call center that involves 1 or 2 people who work for our agency. They take dispatch calls and schedule rides. They use ParaPlan software as their dispatch and scheduling software that is updated daily. Drivers keep a manifest of riders and their pick up and drop off locations and times. We serve senior centers in 13 locations through southeast Alaska serving seniors and persons with disabilities with transportation to medical appointments, shopping, and access to community resources. All vehicles are wheelchair accessible cutaway vans.
<b>Hopelink</b>	Staci Haber	WA	10	Our mobility management program serves King County and is comprised of 1 Mobility Manager and 7 support staff. We focus on coordination with transportation providers, human service agencies, and end users through a county-wide mobility coalition, subcommittees, and sub-regional

				<p>coalitions. We offer extensive information and assistance through tabling at facilities and resource fairs, transit instruction trips, and train-the-trainer sessions. We offer a website that refers people to transportation resources. This helps in our outreach efforts but unfortunately technology and too many providers has prevented us from offering a true one-call/one-click service.</p>
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## Sample Documents and Templates

- Memorandum of Understanding
- Transportation Provider Profile (available along with other resources for conducting inventory of transportation services at [http://www.ctaa.org/webmodules/webarticles/articlefiles/Transportation\\_Provider\\_Profile.doc](http://www.ctaa.org/webmodules/webarticles/articlefiles/Transportation_Provider_Profile.doc) OR <https://nationalcenterformobilitymanagement.org/by-topic/by-topic-surveys/>)
- Community Coordination Survey (available along with other resources for identifying community transportation at [https://nationalcenterformobilitymanagement.org/wp-content/uploads/2013/12/Survey\\_Coordination.docx](https://nationalcenterformobilitymanagement.org/wp-content/uploads/2013/12/Survey_Coordination.docx) OR <https://nationalcenterformobilitymanagement.org/by-topic/by-topic-surveys/>)





**DRAFT**  
**SAMPLE**  
**MEMORANDUM OF UNDERSTANDING**  
**ONE-CALL CENTER**  
**Between the**

[insert organizations]

## ***I. Purpose***

The following is an agreement between [insert organizations]. The purpose for this Memorandum of Understanding (MOU) is to detail the roles and responsibilities of each organization in regard to the administration and operations of the [insert project or service name.]

The period of this agreement begins on [insert date] and continues until [insert date a year from the start date].

## **II. Roles and Responsibilities**

[insert organization]

### ***Administration***

- Hire, train, house, and supervise staff for the one-call center.
- Maintain budget and monitor operating expenses for the one-call center.
- Research funding programs and submit appropriate applications.
- Monitor and evaluate call center services and producing appropriate reports.
- Identify additional opportunities to expand call center functions, i.e. one-click services.
- Identify costs related to services beyond call center functions and work with partners on any fees or shared costs.

### ***Operations***

- Establish a toll-free phone number for the public to call.
- Counsel customers on trip planning and determination of eligibility for services.
- Utilize current software program to schedule rides for qualified individuals on one of the three service providers.
- Communicate appropriate trip information to partner agencies (see policies and procedures).
- Maintain database of current transportation services.

- Develop appropriate forms in consultation with other partners.
- Identify opportunities to streamline eligibility processes.
- Provide information and referral to other services as appropriate.

**[insert next organization]**

- Implement technology to support coordinated scheduling program.
- Provide trips assigned through coordinated scheduling program.
- Verify trip data and communicate to PAA through call center.

**[insert next organization]**

- Implement technology to support coordinated scheduling program.
- Coordinate trips with volunteer drivers assigned through coordinated scheduling program.
- Verify trip data and communicate through the call center.

**JOINT Responsibilities**

***Information Sharing***

- Provide information about and train one another on their respective services and philosophies.
- Share information regarding services, other providers and resources to assist in maintaining and updating their call center database.
- Provide each other with information regarding unmet needs identified through the call center or transportation services.
- Share information about staff and consumer training opportunities.

***Collaborate on Community Events and Outreach***

- Collaborate on community events and outreach.
- Market one-call center services.

**III. Policies and Procedures (*these are sample procedures -- will need to be updated based on final process for scheduling trips through coordinated software program*)**

**[insert appropriate organization(s)]**

- By 4:00 PM each weekday communicate all ride requests for services.
- Enter rides into system and schedule the rides with their volunteer drivers.
- By 9:00 AM each weekday send confirmation of the rides scheduled for each day and a confirmation of the rides provided on previous days by agency drivers. .

*Appropriate information can be included in this section based on additional partnerships.*

**Call Center Process for Referrals for Service**

*Add appropriate information on call center process.*

This agreement is effective until terminated by either party and may be revised upon the mutual concurrence of both parties.

\_\_\_\_\_  
*[Insert agency representative name]*

\_\_\_\_\_  
Date

\_\_\_\_\_  
*[Insert agency representative name]*

\_\_\_\_\_  
Date

\_\_\_\_\_  
*[Insert agency representative name]*

\_\_\_\_\_  
Date

Effective: *[Place date here]*

Revised: *[Place date here]*

## TRANSPORTATION PROVIDER PROFILE (create one for each provider)

### 1. Organization/Agency Information

Name of agency/organization: \_\_\_\_\_

Type of organization:  Public  Private  Nonprofit

Name of transportation program: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ TTY: \_\_\_\_\_ Fax: \_\_\_\_\_

Website: \_\_\_\_\_

Member of  Local/national chamber of commerce  Better Business Bureau  
 Professional membership organization (e.g., CTAA, TLPA, APTA)  
Org. name: \_\_\_\_\_

Receives  federal funding  state funding  local funding  private funding

Contact name: \_\_\_\_\_ Title: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Schedules:  Published schedules/ride guide  on Internet  
 Recorded information number: \_\_\_\_\_

Where updates during inclement weather are posted: \_\_\_\_\_

### 2. Service Characteristics

Service area:  local  long distance  commuter/express  shuttle/feeder route

Areas served in the community: \_\_\_\_\_

Days/hours of operation:  Monday Hours: \_\_\_\_\_  
 Tuesday Hours: \_\_\_\_\_  
 Wednesday Hours: \_\_\_\_\_  
 Thursday Hours: \_\_\_\_\_  
 Friday Hours: \_\_\_\_\_  
 Saturday Hours: \_\_\_\_\_  
 Sunday Hours: \_\_\_\_\_  
 Holidays Hours: \_\_\_\_\_

Provides ADA-complementary service?  Yes  No

Type of route:  fixed route  deviated fixed route  demand-response  
 flexible route  shuttle/circulator  other: \_\_\_\_\_

Type of schedule:  fixed stops  demand-response scheduling

Type of service:  transit stop  door-through-door  door-to-door  curb-to-curb

Service fee:  sliding scale \$ \_\_\_\_\_  discounts available  
 flat rate \$ \_\_\_\_\_  free  
 mileage rate \$ \_\_\_\_\_  donations accepted  
 in-kind payment  other: \_\_\_\_\_

**Form of payment accepted:**  cash  token only  smart card  
 debit/credit card  transfer coupon  voucher  
 transit pass  ID only (e.g., military, work ID)  
 contract only  direct billing to agency

**Reservations:**  no reservations needed  same day reservations  
 schedule \_\_\_\_\_ hours/days in advance  
 Cancellation policy: \_\_\_\_\_

**3. Vehicles**

**Average age of fleet:** \_\_\_\_\_ **Size of fleet:** \_\_\_\_\_

**Insurance?**  Yes  No **Exp. date:** \_\_\_\_\_  
**State/local certification?**  Yes  No  
**Head Start compliant?**  Yes  No

**Type of vehicles:**  bus (capacity: \_\_\_\_\_)  
 taxi  van (capacity: \_\_\_\_\_)  
 private vehicle  other

**Features:**  low-floor  talking signs  visual display  
 wheelchair ramp  wheelchair lift (weight limit: \_\_\_\_\_)  
 bike rack  wheelchair securement system  
 seat belts  # of wheelchair spaces: \_\_\_\_\_  
 4-wheel drive  accommodates scooters/oversize wheelchairs  
 other \_\_\_\_\_

**4. Drivers**

**Type of drivers:**  paid, regular employees  volunteer drivers

**Driver training:**  first aid/CPR  wheelchair securement  
 CDL  medical emergency procedures  
 sensitivity/awareness training  PASS (Passenger Service and Safety)  
 child passenger safety  defensive driving

**Driver testing:**  Drug/alcohol  Motor vehicle record  
 Criminal background  Other: \_\_\_\_\_

**Languages spoken (incl. sign language):** \_\_\_\_\_

**5. Riders**

**Riders served:**  general public  people w/disabilities  
 adults only  teens  children  
 older adults  veterans  other: \_\_\_\_\_

**Rider eligibility criteria:** \_\_\_\_\_

**Purpose of rides:**  medical/health care  religious events  childcare  
 employment  social/recreational activities  shopping  
 volunteer activities  any purpose

**Escorts:**  escorts provided  escorts NOT provided  
 escorts ride for free  escorts pay fare \$ \_\_\_\_\_ (amount)

**Policy on animals:** \_\_\_\_\_

**6. Other Features**

Travel orientation  Travel training  Guaranteed ride home program  
**Other:** \_\_\_\_\_



*Note: This survey is intended only as a sample. Communities are encouraged to adapt the survey to their own purposes.*

### TRANSPORTATION NEEDS SURVEY

1. Please tell us about yourself:

Name:

Company:

Title:

City/Town:

Email address:

Phone number:

#### Community Transportation

*Note: Community transportation is defined as “The network of publicly or privately owned transportation services providing general public or special-purpose transportation (e.g., for people with disabilities, people with limited income) by bus, van, train, car, ferry, taxi, or a similar means in return for a pre-established fare, no fare, or on a volunteer basis.” With this definition in mind, please answer the following questions:*

2. Community transportation services are most important in our area for the following reasons (choose up to 3 answers):

- To allow people to access medical-related destinations
- To connect people with faith-based and social activities
- To provide people with access to essential destinations (e.g., grocery stores, government services)
- To bring people to jobs, training, and education
- To reduce traffic congestion on heavily traveled routes
- To provide people with an alternative to vehicle ownership
- To promote the vibrancy of our city center
- To help people to connect to regional destinations
- All of the above
- None of the above
- Other (please specify):

3. Support for community transportation services in our area is strongest among the following (choose up to three answers):

- General public
- Social service agencies
- Business community
- Elected officials
- Faith-based organizations
- Community action agencies
- Senior services agencies
- Disability services agencies
- Other (please specify):

4. Our community needs additional transportation options to serve the following (check all that apply):

- Older adults getting to meal sites, medical appointments, social events
- Workers to get to 2nd and 3rd shift jobs
- Transportation to medical appointments for chronic illnesses (e.g., dialysis, chemotherapy)
- Transportation for youth, other non-driving residents to jobs and training
- Rural residents getting to destinations in more urban areas
- Wheelchair-accessible service after transit hours
- Evening and weekend service
- Employment transportation that accommodates stops (e.g., child care)
- Transportation to faith-based services
- Other (please specify):

**Envisioning Transportation Progress in Our Community**

5. Leaders, organizations, and members in my community share a common vision for transportation services in my community.

- Needs to begin
- Needs significant action
- Needs action
- Done well
- I'm not sure

6. A communications framework exists that brings together community organizations, leaders, and consumers to discuss transportation issues within the context of other community priorities.

- Needs to begin
- Needs significant action
- Needs action
- Done well

I'm not sure

7. Our community has good relationships with neighboring communities on transportation issues and can facilitate regional travel.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
8. Customer ideas and concerns are regularly gathered regarding existing transportation options.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
9. I am interested in helping our community develop its vision for transportation services.
- Yes
  - No
  - Need more information. Please contact me.

**Expanding Services through Coordination**

10. Our community has identified how better coordinating existing transportation services can lead to expanded availability of services.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
11. The benefits to the community of coordinating all existing transportation options are clear to community stakeholders.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
12. Current transportation providers and stakeholders collaborate to maximize available transportation options for all community members.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
13. Our community has identified existing duplication in transportation services, underused assets, and service gaps.
- Needs to begin
  - Needs significant action
  - Needs action
  - Done well
  - I'm not sure
14. I am interested in helping our community better coordinated transportation services.
- Yes



No  
 Need more information. Please contact me.

SAMPLE

# **Public Transit and Human Service Coordination**

One of the hallmarks of mobility management is to expand transportation options through the coordinated use of existing services and resources. In addition, as noted earlier in this guide mobility managers can lead or be heavily involved in the coordinated public transit-human services transportation planning process required for the FTA Section 5310 Program.

While many resources noted through the guide will help with these efforts, as will those available through the websites provided earlier in this section, the following resources can offer specific assistance:

- **Cost-Sharing for FTA Grantees.**

This NCMM brief is written for mobility managers as they collaborate with human service agencies in their community to provide coordinated transportation services.

Available at  
<http://bit.ly/2jEow8q> (or  
<https://nationalcenterformobilitymanagement.org/by-topic/by-topic-funding/>)

- **Transportation by the Numbers.**

This resource, available through the NADTC, provides human service organizations with ways to more easily identify expenses, revenues, and performance outcomes. After this assessment agencies can make more informed decisions about their future in the transportation business, and mobility managers are more prepared to work with

them on potential coordination efforts.

Available at  
<http://www.nadtc.org/resources-publications/transportation-by-the-numbers-2>

- **Sharing the Costs for Human Service Transportation.**

The Transportation Cooperative Research Program (TCRP) Report 144, Volume 1: The Transportation Services Cost Sharing Toolkit and Volume 2: Research Report, explore issues and potential solutions for identifying and sharing the cost of providing transportation services for access to community-based human services programs. Collectively, the two volumes examine current practices and offer strategies for collecting necessary data, addressing administrative and policy-related issues, and establishing cost allocation procedures.

Available at  
<http://www.trb.org/Publications/Blurbs/165015.aspx>

- **Tip-Sheet: Planning Friendly Meetings (Going Beyond the ADA to Make Your Meeting Place User-Friendly).**

Available through the Transit Planning for All project website, this resource can assist mobility managers when planning community meetings and to ensure that older persons

and persons with disabilities feel welcome.

Available at  
<http://web1.ctaa.org/webmodules/webarticles/articlefiles/planninginclusivemeetings.pdf>

- **Developing Coordinated Transportation Plans.** This NCMM brief is part of their “Promising Practices in Mobility Management” series, and was created for mobility management

practitioners to help with transportation coordination. The brief profiles five communities and their coordinated transportation planning processes. The method to choose these programs was used to select mobility management practices profiled in this guide.

Available at <http://bit.ly/1EU3Xur>

# Helpful Websites

While some of these websites are noted in this guidebook, here's a cumulative list along with other helpful sites:

- American Public Transportation Association (APTA):  
[www.apta.com](http://www.apta.com)
- Community Transportation Association of America (CTAA):  
[www.ctaa.org](http://www.ctaa.org)
- Easterseals:  
<http://www.easterseals.com>
- Federal Transit Administration (FTA):  
<http://www.fta.dot.gov>
- National Aging and Disability Transportation Center (NADTC):  
[www.natdc.org](http://www.natdc.org)
- National Cooperative Highway Research Program (NCHRP):  
<http://www.trb.org/NCHRP/NCHRP.aspx>
- National Rural Transit Assistance Program (RTAP):  
<http://www.nationalrtap.org>
- National Volunteer Transportation Center:  
<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3767&z=132>
- Taxicab, Limousine & Paratransit Association (TLPA):  
<http://www.tlpa.org>
- Transit Cooperative Research Program (TCRP):  
<http://www.apta.com/resources/tcrp/Pages/default.aspx>
- Transit Planning For All:  
<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3265>