Mobility Management Sustainability Assessment Tool –Lessons from the Field

March 2023

The National Center for Mobility Management (NCMM; nc4mm.org) is a national technical assistance center created to facilitate communities in adopting mobility management strategies. NCMM is funded through a cooperative agreement with the Federal Transit Administration (FTA) and is operated through a consortium of three national organizations – the American Public Transportation Association, the Community Transportation Association of America, and Easterseals, Inc. NCMM is charged with supporting FTA and its partners in carrying out the recommendations suggested in the updated [Coordinating Council on Access and Mobility *CCAM) Strategic Plan](#).

About the National Center for Mobility Management (NCMM)
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About Transport New Hampshire (TNH) Transport New Hampshire is a statewide advocacy and support organization that broadly supports transportation in all its modes, but with a specific focus on community transportation services public transit and active transportation. Most recently TNH led the development of the New Hampshire Statewide Mobility Management Network and is now tasked with providing support to the regions as it is implemented. TNH is also active on the national scene with the intention of increasing collaboration between N.H. and other states and organizations focused on improving the capacity of our public and community transportation systems.

About Easterseals
Since its founding in 1919, Easterseals has remained committed to ensuring that the needs of children and adults with disabilities, veterans and older adults are met with services and support to help them live, learn, work, and play in their communities. By combining on-the-ground presence, deep expertise, and diverse programs, 69 Easterseals affiliates nationwide are advancing change to assure that people with disabilities and other special needs can thrive in their communities.

About this Information Brief
Easterseals, through its work at the National Center for Mobility Management (NCMM), focuses on building connections across education, human services, and transportation sectors so that individuals with disabilities can access school, work, health care, and other inclusive community settings. In this work, NCMM has researched, and sourced national examples to identify programs using FTA and private funding that demonstrate mobility management activities performed by various agencies around an area defined as a state or region. This document will review the history, activities and projects conducted by the Mississippi mobility network across their region, state, or local communities.

For questions about this product or to start a conversation about the mobility management sustainability assessment tool, please contact Judy Shanley, Ph.D, Easterseals Partner Director, NCMM at JShanley@easterseals.com and Steve Workman, Director, Transport NH steve@transportnh.org.

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- Easterseals, Inc.
- Easterseals Project Action
- Transport NH
- Mississippi Department of Transportation and state Mobility Managers
- Minnesota Department of Transportation and state Mobility Managers

Implementation of the Mobility Management Sustainability Assessment Tool (MM-SAT)
**Lessons from the Field**

Summary

Initial development of the Mobility Management Sustainability Assessment Tool (herein, MM-SAT) occurred during year three of the NCMM Workplan (March 2021 – February 2022). Mobility management professionals from Arizona, Wisconsin and Minnesota assisted NCMM with the early development of the MM-SAT during work sessions at their respective conferences. This initial work allowed NCMM to test assumptions, assess the understanding of certain concepts and explore how a group of mobility management professionals interacted during group discussion of topics covered by the MM-SAT. At the conclusion of this learning process, NCMM incorporated lessons learned and created a pilot version of the MM-SAT. The final step of the development process was to pilot the MM-SAT in two different states. NCMM worked with Ohio Department of Transportation, Office of Transit and a group of its mobility managers through a statewide network evaluation using the MM-SAT in Ohio. NCMM also worked with a Mobility Manager in Region 10 Mobility Manager that led the Alliance for Community Transportation and its members through a regional network evaluation of the MM-SAT in New Hampshire so that we could see the tool implemented at two different targeted focus areas, state and regional. Once completed, NCMM again incorporated what it learned and published the current version of the MM-SAT.

Once published in April 2022, the MM-SAT was made accessible to all, but NCMM correctly anticipated that it would need to take an active role in promoting and helping states to understand and use this new product. A target goal to implement the MM-SAT in two different states was incorporated into year four of the NCMM Workplan (March 2022 – February 2023). NCMM reached out to several states that it knew were actively building and refining their mobility management services and networks to see which were willing to use the MM-SAT. Ultimately Ohio and Mississippi were selected to work with NCMM staff to explore the MM-SAT and ideally complete the assessment. The remainder of this document will introduce the participating states, explain how each approached the MM-SAT and lessons learned.

State Participant Partners

Mississippi: Mississippi Department of Transportation expressed interest in the MM-SAT because it wanted to find tools and resources that could help it sustain and grow its local coordination and mobility management services. The state organizes service delivery and coordination through six regional coordination transportation planning groups: Delta Rides, Trans-Con, SMART, Ride the Smile, EZTAG, and Southern Connect. These groups represent over 60 providers making over five million trips each year. NCMM technicians conducted virtual and in-person workshops with DOT leadership and regional mobility management practitioners. At the time of this report, Mississippi has worked to understand the purpose and benefit of the MM-SAT, created buy-in to use the MM-SAT and launched the assessment itself. Next steps will include follow-up virtual sessions to assist them in completing the assessment and organize its findings. Depending on resources, an in-person workshop may be included.
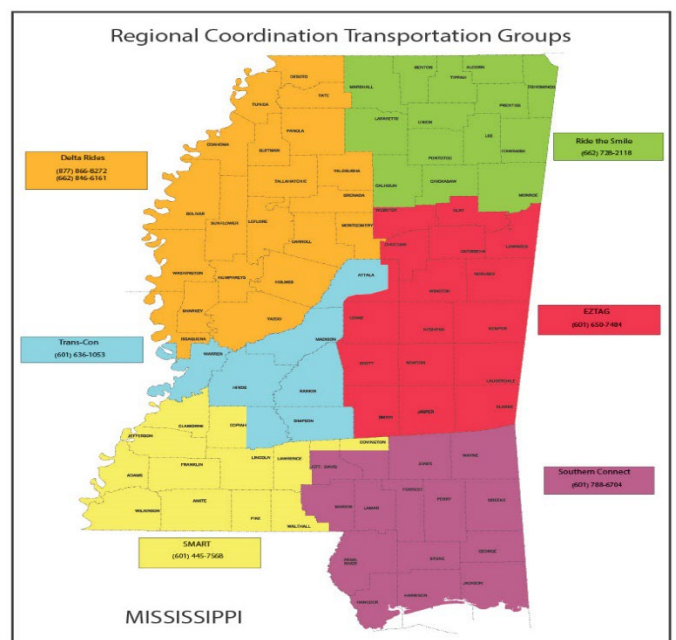
Minnesota: Minnesota Department of Transportation first learned about the MM-SAT when NCMM conducted workshops on the early development of the MM-SAT during the joint Minnesota-Wisconsin Transit Conference in October 2021. Once the MM-SAT was finalized and published, MDOT was interested in exploring further how the MM-SAT could help it sustain and grow its local coordination and mobility management services. It also saw MM-SAT as a possible tool that would compliment its recently developed Logic Model. The state organizes coordination and service delivery starting with the Minnesota Council of Transportation Access (MCOT) which is similar to the Federal Coordinating Council on Access and Mobility (CCAM) eight Regional Transportation Coordination Councils (RTCCs) in Greater Minnesota and six Transit Coordination Assistance Projects (TCAPs) in the Metro Area. NCMM technicians conducted virtual workshops with DOT leadership and regional mobility management practitioners. At the time of this report, Minnesota has worked to understand the purpose and benefit of the MM-SAT, created buy-in to use the MM-SAT and completed a practice assessment using one of the MM-SAT Dimension. Next steps will include a second virtual workshop to refresh the MM-SAT and prepare for a Fall in-person workshop to conduct the full MM-SAT.
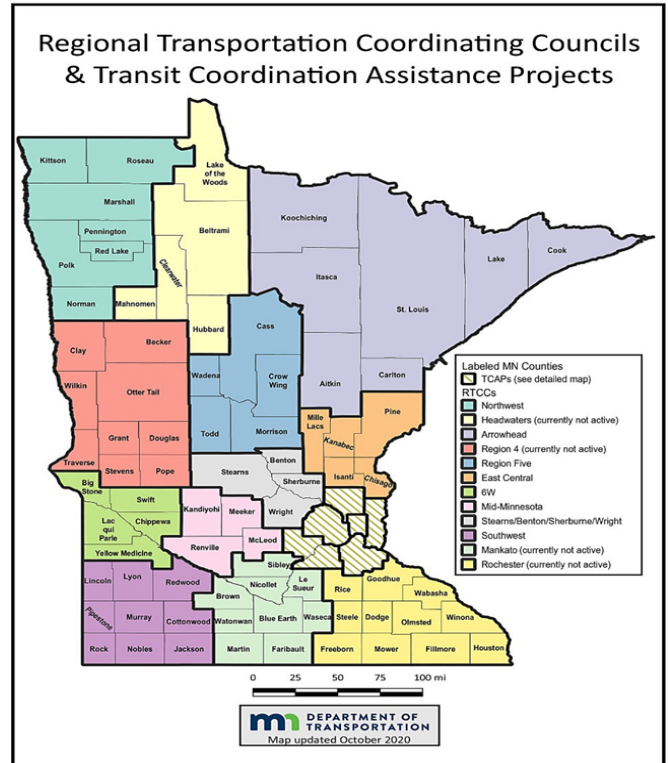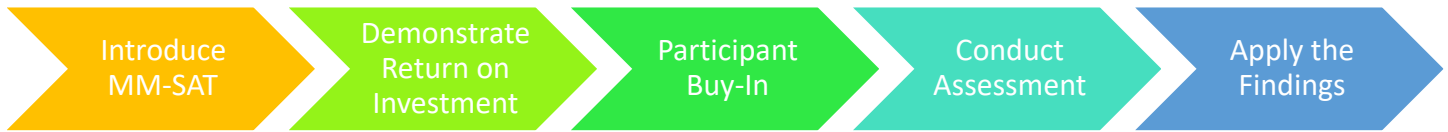

Conducting the MM-SAT in the Field

NCMM personnel working in the field to implement the MM-SAT were able to work closely with departments of transportation leaders and mobility management practitioners with diverse responsibilities and operating structures. Generally, the process starts with an exploration of the MM-SAT with DOT leaders so that they can understand the purpose, process, and return on investment that the MM-SAT offers. It is helpful at this stage to connect the MM-SAT to planning activities and related documents that they already employ to demonstrate how MM-SAT can fit within and enhance those activities. Examples may include strategic plans, logic models, theory of change models, coordinated transportation plans and more. Typically, once DOT leaders see potential benefit, a similar process with mobility management practitioners is conducted to show them the value and create buy-in. Once there is agreement of the value and desire to conduct MM-SAT between DOT leadership and practitioners the work of conducting the assessment can commence.

Conducting the MM-SAT is the next phase of the work, and it requires a greater investment of time. Most groups have elected to break the assessment into smaller bites by working through two or three of the five dimensions per session. This results in multiple work sessions with hours or days in between depending on circumstances. It is also possible to conduct the MM-SAT in smaller groups that rotate through the selected dimensions for that session. This results in two sets of responses that can be merged in the final report, but the potential benefit of smaller groups improves both logistics and group dynamics. Regardless of how the assessment is structured, the value is in the discussions that occur. The coming together of a diverse group of professionals working at different levels and with different responsibilities creates an opportunity to learn from each other and consider aspects of mobility management that have yet to be recognized by

an organization, leadership, or individual. As a facilitator/observer one can see how policies, structures, and organizational cultures impact the different roles from leadership to practitioners working where the rubber meets the road.

Introduce MM-SAT → Demonstrate Return on Investment → Participant Buy-In → Conduct Assessment → Apply the Findings

Lessons from the Field

The Human Side of Mobility Management

1. While not exclusive to the MM-SAT, working in the field reminds us that the customer or person-centered focus at the heart of mobility management is but one side of a coin. The other side is that mobility management requires people to provide the services.   Put another way, mobility management is about providing services for people, by people. If this is true, we must remember that the people providing services have similar aspirations, a desire to be valued, respected, and treated as fairly as the customers they serve. Therefore, investing in our mobility management practitioners through technical assistance, opportunities for peer-to-peer learning, and deliberate and meaningful inclusion in organizational planning, operations, and evaluation is equally important.

2. Creating a safe Space for practitioners to conduct the assessment is essential. We have heard that some practitioners are concerned that speaking openly during the assessment could pit them against or bring retribution from co-workers, supervisors, or state and federal agencies. Others have suggested that the assessment is like a group review of his/her job performance. These are valid concerns, and we understand that a poor organizational culture or difficult employee could reinforce such concerns. For the facilitator, it will be important to address these concerns upfront and to be prepared to address such dynamics when they emerge during the assessment. Framing the assessment as an opportunity for open and honest dialogue for the purpose of creating and sustaining a thriving organization and services is the best place to start. Receiving this message directly from the highest levels of leadership is critical, but leaders must remain vigilant and address any of these negative dynamics if they emerge during or after the completion of the assessment. Mississippi and Minnesota Departments of Transportation exceeded at communicating that it was important to them to maintain a space where feedback, ideas and perspectives were wanted, valued and essential to continual improvement and sustainability.

3. Information delivery is another topic that is not exclusive to MM-SAT, but the experience we gained while working in the field is relevant to all the ways information is provided to the field. Consideration about how information is structured and delivered is not new to federal agencies or technical assistance centers which demonstrate significant effort to provide clear, concise information in a way that is accessible to all. It is a tall order to truly provide information accessible to all, but it is in the best interest of government, agencies, and people to continually strive to achieve that goal. Let's pretend for a moment that the MM-SAT Technical Guide itself is the crowning achievement of accessible information. Does this guarantee that the field will receive it, digest it and act upon it? The answer is no. It would appear that a bridge is needed between where the information resides and where leaders and practitioners reside in the field. The following are examples supporting the need for bridge activities:

   a. **Opportunities to access and use new Information in the field is critical**. Despite best efforts that can sometimes be a challenge for practitioners and technicians alike as one technician shares: I am a life-long learner. Learning new things that I can apply to my life and work excites and energizes me. At work this means I am constantly

looking for the next edition of technical assistance center newsletters, new studies from the National Academies of Science, and thought pieces that stretch me to imagine what is possible and how we might get there. Then life happens and I get busy. I didn't lose my love for learning or professional self-improvement, but my responsibilities frequently take me away from discovery of new information and ideas. In the fast pace of today's world, I frequently miss opportunities to learn because I am temporarily busy, but this means I usually miss the window of opportunity. At that point I must (unknowingly) wait for a time when I stumble on the information by accident or when and if it gets elevated by the field allowing me an opportunity to discover it after the fact. If as a self-proclaimed life-long learner I miss new information that I want to receive and my job makes space for, how could someone whose job doesn't allow much time for professional or organizational development gain exposure? The field would benefit from even greater effort to actively bring information to practitioners in addition to passive methods such as newsletters and websites widely used today.

b. **This material is dense!** We heard versions of this sentiment multiple times, and it wasn't a surprise because the MM-SAT was designed to push practitioners to consider the many different parts of the system that must function well to remain sustainable. This is not an issue of ability to learn, and it makes perfect sense that time and guidance was needed to work through the information because many of the parts (dimensions) are outside of practitioners' daily responsibilities. Whenever new information is presented, the recipient needs time to understand and then incorporate it into their existing knowledge and experience. While technicians should always strive to present clear and concise information, dense or complicated information is not a reason to simplify. Instead, techniques for helping practitioners to digest the information, connect it to their work and then act on the new information should be developed. As a practical matter this could mean finding ways to highlight salient points and incorporate other styles of learning such as visual aids in addition to the text blocks that provide more detail.

c. **Related to information delivery, culture and language can impact how information is received, understood, and acted upon.** Using the broadest of applications, culture could be racial, geographic, or organizational. One humorous example of geographical differences is when Steve, a New Englander, was presenting information to practitioners in Mississippi and moving quickly to cover as much material as possible. Suddenly, several practitioners said, "Steve, you're in the South now, we take things slower!" We all had a good laugh and I confessed to my fast-talking New England ways, but more importantly I was able to course correct and they had given me permission to move more slowly through the information; it was a mutual win. The takeaway is that as technicians we need to learn as much as we can about the groups we will be working with and then to be ready to make adaptations or course corrections to ensure mutual outcomes are achieved.

d. **As technical assistance professionals it is important for us to remember that the people we assist come with their own knowledge, experiences, and goals.** Rather than present new information strictly teacher to student, it would be more effective to create an environment where learning is a two-way, collaborative process. This helps TA professionals to meet practitioners where they are at, demonstrate respect for practitioner knowledge and experiences, and create opportunities to learn from the field itself. Learning from on-the-ground experiences in the field allows the TA professional to bring information back that could be used to revise policies and procedures, education materials, or identify areas where further assistance is needed. Essentially, refining this approach to providing technical assistance becomes an iterative process that benefits the field, individual practitioners, and governing systems.

Understanding the MM-SAT

4. We have been conditioned to associate evaluation with some type of scoring system. It is often helpful to have a concise measure to track progress and this is why MM-SAT does include a scale: emerging, moderate, or high capacities. However, the magic of the MM-SAT is the guided discussions that occur as participants move through the

five dimensions. Efforts should made to underscore this point so that practitioners and leaders do not become overly focused on the "grade" instead of the content that came out of the assessment.

5. The MM-SAT is an evaluation tool. It was not created to provide solutions to challenges, but to identify challenges so that strategies to address areas flagged for improvement could be developed later. While it is natural to want to solve a problem, facilitators and participants will have to be vigilant to keep the focus on evaluation. If this focus is not maintained, the evaluation process will become drawn-out, lose its focus or even become contentious if the free flow of ideas isn't managed properly.

6. Initially, some of the dimensions or subdimensions may appear irrelevant or outside of a participant's job. While some may be outside of one's job description that does not mean they are not relevant or important to work done and the overall health of the organizational system. For example, a mobility management practitioner may have little or nothing to do with Dimension One, Organizational Infrastructure and its five subdimensions: governance, operating systems and procedures, human resources, funding, and internal communications. However, practitioners and the services provided are impacted by these five subdimensions. This suggests an inherent interest in how an organization is operating on the part of the practitioner. Further, many practitioners operate in the space *where the rubber meets the road*. This means that they have invaluable insight regarding the successes and challenges of organizational policies, procedures, and systems as well as customer and employee satisfaction. These insights are critical if policy makers and leadership want an organization to be sustainable and thrive. For the facilitator, it will be important to explain this when introducing the MM-SAT to leadership and practitioners and to reinforce it when conducting the assessment.

Return on Investment

7. MM-SAT requires an investment of NCMM personnel time (and money) but after repeated experience both during MM-SAT development and implementation this is needed so that DOT leadership and practitioners are willing to invest the time required to conduct assessment.

8. Committing to the MM-SAT requires a strong understanding of why it is important and how an organization and practitioner can benefit; in other words, what is the return on the investment? These questions should be answered when the MM-SAT is introduced, and throughout the assessment, as necessary. The importance is relatively simple, if you do not assess your organization and services you cannot build on strengths and focus on areas that need improvement. This has negative impacts on sustainability considering the adage that you are only as strong as your weakest link. As a practical matter, the insights gained from taking the assessment can be used to inform strategic plans, logic models, theories of change, performance reviews, data driven investments and a host of required regional, state and federal planning documents. Finally, if embraced the assessment can be a way to increase understanding of how the organization operates and create a sense of shared purpose to sustain the entire organization.

<u>**Recommendations**</u>

The recommendations below were developed in response to issues identified in the Findings section of this document. Several of the recommendations could be applied topics beyond the MM-SAT and may be beneficial to Federal Transit Administration (FTA) technical assistance products, and technical assistance centers. The initial target for these recommendations is FTA and National Center for Mobility Management personnel because implementing the recommendations have implications for work plans, resources, and leaders across both. While states would not be involved with the recommended changes to the MM-SAT, most of the recommendations are still of value when a state is considering using the MM-SAT and for facilitators who might lead the process.

1. **Repackage MM-SAT**:   The MM-SAT was developed to focus practitioners on sustainability across all aspects of operations. Based on findings we have learned that MM-SAT creates a space to have operational discussions that often don't occur or are left to the highest level of management. The MM-Sat Implementation Guide does compare MM-SAT to a SWOC Analysis (strengths, weaknesses, opportunities, and challenges) but with a structured process that focuses attention on specific content (dimensions) rather than open brainstorming. Work in the field confirmed this and expanded its practical application to inform strategic plans, logic models, theories of change, performance reviews, data driven investments and a host of required regional, state, and federal planning documents. The recommendations below may help the field to understand the practical benefits and return on investment of using the MM-SAT.

    a. MM-SAT currently stands for Mobility Management Sustainability Assessment. Rather than sustainability which is the lens MM-SAT employs, changing sustainability to self as in self-assessment might improve topline understanding of the tool and increase the likelihood that practitioners will take a closer look at what MM-SAT can offer. This does not require a change to the acronym which is already known in some parts of the field and doesn't change the intent to focus on overall sustainability.

    b. The MM-SAT Implementation Guide already explains in detail the purpose of the tool and the benefits, but here again, it might be beneficial to develop a subtitle that distills the purpose. For example, MM-SAT: A tool to help practitioners develop and sustain thriving mobility management services.

2. **Augment the MM-SAT & Guide**: In response to comments that the MM-SAT is dense, there are opportunities to revise the implementation guide to include summary points or similar techniques to underscore the key points by section. The process of conducting the assessment could also be improved by creating a bulleted list of questions to guide discussion under each sub dimension. This will help kick-start group discussion and break the dimension summary into more digestible bites. Finally, the guide and facilitator should emphasize how important it is to capture key points during discussion rather than focus on grading performance without any data to support the grade.

3. **Facilitation:** A person who understands the MM-SAT and has facilitation skills is best suited to lead the initial assessment process. This could be achieved through participation in an introductory seminar offered at a conference or state/regional workshops; however, this method will work best for someone who already has experience with policy development, organizational operations, and facilitation. Ideally, a more effective process would be for practitioners to go through the entire assessment under the guidance of an experienced facilitator. Once they have experienced the process, they are better positioned to lead the assessment in a future cycle or assist peers in implementing the assessment in another region. Over time this will create a cadre of experienced facilitators to keep the field focused on sustainability and organizational health.

4. **Language & Culture**: Grounded in diversity, equity and inclusion goals, language and culture are critical areas that must be addressed to work more effectively in the field and service delivery. Language is perhaps the easiest barrier to address whereas cultural considerations can be more nuanced. Culture can also apply to norms in an organization that has little or nothing to do with race or nationality, we often call this organizational culture. The recommendations below focus on MM-SAT but are widely applicable to information dissemination and work in the field more generally.

    a. Translating the MM-SAT Implementation Guide into different languages could help determine if language barriers cause a practitioner to avoid using it or reduce understanding of the material. As the MM-SAT is an internal tool for the field, translations should be guided by the language needs of practitioners. Initially we recommend translating the MM-SAT into Spanish and to work with Spanish speaking practitioners who could assist NCMM in evaluating the potential benefits of the translation.

    b. Related to translation of materials, if there is a high concentration of practitioners for whom English is not their primary language consideration should be given to using an interpreter.

c. When technicians develop materials for and work with groups representing different cultures, it would be beneficial to do some advance work to better understand that audience. This could be augmented by partnering with another professional who could help you better understand the cultural norms and differences of the group, introduce you to the group, and assist you as you work with the group. Really the same work a facilitator would do before starting to work with any group.

d. When the MM-SAT was being developed a few practitioners from tribal systems were in attendance, but it has yet to be fully tested in a tribal setting. Initial observations during development suggested that there may have been some degree of cultural and language issues at play, but that has not been confirmed. We recommend presenting the MM-SAT at the National Transportation in Indian Country Conference and to pilot the MM-SAT with at least one tribal transportation system.

5. **Invest in Soft Skills**: Defined as personal attributes or core skills applicable to all professions, soft skills enable someone to work and interact more effectively in organizations and with people. This contrasts with hard skills which are specific to a profession – think, travel training, call center operations, driving a vehicle, etc. There is a tendency to focus on the development of hard skills at the unintended expense of soft skill development. Soft skills can include critical thinking, problem solving, public speaking, professional writing, facilitation, group dynamics, thinking & learning styles, leadership, professional attitude, work ethic, and more. Practitioners who focus on the development of such skills are an asset to the field – a rising tide floats all boats. Government and technical assistance centers would be well served in creating more resources and training opportunities to develop these skills; especially if the skills can be taught in the context of the work being done by mobility management practitioners.

6. **Respond to the Needs of Your Audience**: There is no substitute for good preparation. Technicians should be prepared with subject matter materials, talking points and goals for the time spent working with practitioners, but should be prepared to switch gears to meet the needs of their audience. In other words, meet people where they are, not where you think or hope they are. A pitfall facing every "content expert" is forgetting that an audience likely does not have the same level of knowledge and experience, or time spent thinking about the content. This is a normal occurrence that can be quickly rectified if you recognize it is happening and adjust to meet the needs of the group. It is true that this might take more time and impact your intended outcomes; however, the opposite approach would be to stick with the original plan without deviation leaving your audience to likely feel unheard and left behind.

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