



Mobility Management Sustainability Assessment Tool (MM-SAT) Implementation Guide

April 2022

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.

This information brief was prepared by NCMM staff and is disseminated in the interest of information exchange. Neither the NCMM nor the FTA assumes liability for its content or use. The opinions and conclusions expressed herein are solely those of the authors and should not be construed as representing the opinions or policy of any agency of the federal government.

Comments or questions about this document can be addressed to info@nc4mm.org or 866-846-6400.



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.

Acknowledgements

Contributors

Special thanks to mobility management professionals from Arizona, Wisconsin and Minnesota who invited NCMM to their transportation conferences. The feedback received was essential to the early development of the MM-SAT.

MM-SAT Field Sites

The MM-SAT would not have made it to publication without Ohio and New Hampshire first agreeing to test it. The leadership of the site liaisons and commitment of the staff, mobility managers and other stakeholders that went through the process ensured that the MM-SAT is a quality product.

Jessie Schmitzer, compliance officer with Ohio Department of Transportation, Office of Transit led ODOT and a group of its mobility managers through a statewide network evaluation using the MM-SAT in Ohio.

Jeff Donald, Region 10 Mobility Manager led the Alliance for Community Transportation and its members through a regional network evaluation of the MM-SAT in New Hampshire.

For More Information

Judy Shanley, Ph.D.,
Easterseals Partner Director, NCMM
JShanley@easterseals.com

Steve Workman, Director, Transport NH
steve@transportnh.org

Introduction

Mobility management networks and activities vary based on regional needs and circumstances, but each share a common philosophy, desired outcomes and require partnerships across the spectrum to be effective. Moving from mobility management as a philosophy to effective delivery of service is a challenging, but necessary process. We call this “operationalizing mobility management” and here again, we find commonality. It takes “boots on the ground,” sweat equity, funding, policy alignment and a willingness to work together to eliminate barriers. Just as mobility management prioritizes the customer, so too does our shared passion to help those we serve.

Taking time away from delivery of service to focus on the future and to evaluate our operations can feel like the last thing we need to add to an already significant workload, but this is a pitfall common to those of us in the helping professions. Instead, we need to reframe this work as necessary to ensure that we can improve and sustain the services that our customers need.

Across the country we see examples of this work in action. NCMM is both leading the charge and learning from the fantastic work being done at the state, regional and the individual provider levels. This national perspective has also helped NCMM identify technical assistance and tools needed to assist the field in its efforts to fulfill the promise of mobility management. The Mobility Management Sustainability Assessment Tool (MM-SAT) and this guide were developed as a framework to help you assess,

NCMM defines sustainability as the attributes and processes of a mobility management network that help the organization to endure and facilitate the ability of the network to meet its purposes and objectives.

grow, and sustain your organization wherever you are at in your development and capacity. The adjacent text box defines sustainability in the context of mobility management networks. For the purposes of this tool, the term “organization” should be used interchangeably with network or the term you use to describe the operations you are describing.

Purpose of the Mobility Management Sustainability Assessment Tool (MM-SAT)

The emerging field of Mobility Management seeks to make sustainability planning a central focus from the outset by outlining steps to be taken to maintain and expand capacity through management and sufficient resources. It is never too early, or too late to prioritize sustainability planning, but it will be easier if it is built into the organizational culture. We suggest that you view MM-SAT as part of your strategic planning process, development of your coordination plans and performance evaluations like how you might use a SWOC (strengths, weaknesses, opportunities, and challenges) analysis. The advantage of the MM-SAT is that the framework was designed specifically for mobility management organizations and informed by best practices. It can also be adapted or scaled to meet your organization where it is currently positioned. We understand that no two mobility management organizations look exactly alike, but there are shared best practices both for organizational operations and service delivery which are valid even if your program doesn't include some component of the MM-SAT. Overall, it may be helpful to think of this as a map-making process that shows you where your capacity is at today and where you would like it to be in the future.

Benefits of Using the MM-SAT

- **Sustainability Planning:** Increasingly government and charitable funding sources are looking for evidence that your organization is thinking about and planning for long-term sustainability.
- **Relationship Building & Buy-in:** Theoretically, a single person could complete the MM-SAT and find value; however, the process of bringing people together to discuss it will prove to be more effective. Think of this process as an opportunity to hear different perspectives, build relationships and create buy-in.

- **Data Driven Strategies:** The adage that doing the same thing produces the same results is quickly thwarted when analysis and data identify strengths to build on and areas that require change. It is also easier to engage people in policy changes and funding needs when data justifies the request.
- **Expanding Capacity in the Field of Mobility Management:** The MM-SAT is one way that mobility management organizations across the country can contribute to the standardization, effectiveness, and shared knowledge in the field of mobility management. Think, better together.

Using the Lens of Sustainability to Evaluate Mobility Management Networks & Activities

Sustainability is not just an environmental measure. In fact, the primary definition of sustainability is “the ability to be maintained at a certain rate or level.” Of course, that includes the environmental dimension, but one cannot focus solely on that if the goal is to not only sustain your operation but also thrive. We must expand our lens to include other dimensions such as economics, workforce, organizational operations, service delivery, and social dimensions. Failure to do this may result in one or more areas (dimensions) of your operation becoming vulnerable to changing circumstances. Conversely, if we invest in regular, broad evaluation we are better positioned to take a holistic approach to sustaining our mobility management networks and activities.

Developing the MM-SAT

Helping the field build sustainability planning into the development and operation of mobility management activities has been a shared priority for FTA, NCMM, and a host of other stakeholders focused on helping the field adapt to ever changing needs and conditions. In response, NCMM prioritized this work in its year-three work plan funded by FTA. Their first task was to figure out how to interject sustainability planning into the work being done in the field. Research guided the activities to develop the MM-SAT, and models from other sectors were used as the foundation for this tool. Descriptions of these models and the history of the MM-SAT development are included in the appendices of this brief. The appendices also include learning from two field implementation sites, in Ohio and New Hampshire. The experiences of mobility management professionals who have implemented the MM-SAT can be valuable to other mobility management professionals who are considering using the tool.

MM-SAT Implementation Checklist

Before Using the MM-SAT

- Determine if you will be evaluating a statewide, regional, or local network/organization.
- Identify key staff and stakeholders who should participate in the evaluation.
- Determine meeting logistics including in-person, virtual or hybrid participation, meeting length, frequency, dates, and times, who will facilitate, scribe, keep time, and food, beverage or other comforts.
- Determine how you will setup the room, any audio/visual needs, ways you will capture participant feedback, agenda for that day's activities (e.g. we will cover Dimensions 1 & 2 during today's meeting) and identify any tools you will use to help move the discussion (e.g. using the concepts of a SWOC Analysis).
- Compile any background materials you may want participants to review in advance.
- Invite participants being sure to include a short description of and purpose for the MM-SAT, the time commitment required, any prep work and meeting details (location, zoom link, etc.)

During the MM-SAT Assessment Process

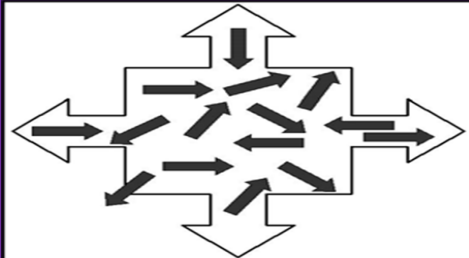
- Welcome participants, review the agenda and purpose for undertaking the MM-SAT **See Pro Tip 1**
- Establish ground rules that will govern how group conducts its work. **See Pro Tip 2**
- Review the MM-SAT in its entirety so participants understand the use/application of sustainability, what the dimensions and sub targets are and the capacity scale.
- Acknowledge that participants will discover overlap between some sub targets, but to do their best to approach each sub target based on the dimension it is listed under.
- Create a safe space. The MM-SAT was designed to empower participants to reflect on the strengths, weaknesses, and opportunities for improvement of the organization. It should not be used punitively or to suggest any one person is responsible for areas that need improvement. Leadership should agree and then convey to participants that all perspectives are valid and welcomed during this process regardless of roles.
- Be mindful of different thinking/processing styles within the group that may impact understanding, communication, and other group dynamics. It may be helpful to talk about this before you begin the evaluation but should be addressed if a problem develops. **See Pro Tip 3**
- As discussion of each sub target nears the end, the group should come to agreement on the capacity level it will assign to it: emerging, moderate, or high. Some groups may wish to acknowledge different levels (e.g. emerging to moderate or moderate to high)
- Identify next steps or expected follow-up.
- Thank participants for their time and effort.

Completion of the MM-SAT

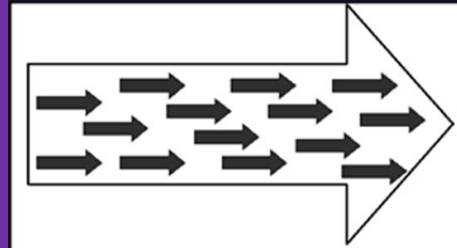
- Reporting: Compile data and comments generated during the evaluation process and complete the MM-SAT matrix so that you have identified the capacity for each sub target. Some organizations may want to use the capacity of sub targets to assign an overall capacity to the dimension.
- If the MM-SAT data is being used to inform other planning activities such as strategic planning and coordination plans, make sure the final report is provided to the individuals responsible for such activities.
- The MM-SAT is not intended to be a one-off activity. Organizations are encouraged to set a time in the future for conducting the next evaluation (e.g. one year). This will also help develop a baseline to track your progress.
- Consider sharing your report with NCMM. Identifying information will remain confidential, but the data generated would help NCMM identify technical assistance needs in the field.

Tips for Conducting Successful Group Discussions

PRO TIP 1: THE VALUE OF COORDINATION & WORKING TOGETHER



Without mobility management strategies providers & modes lack coordination & shared purpose



With mobility management strategies. Providers & modes retain independence but work collaboratively.

PRO TIP 2: GROUND RULES

Participants want a fair and open process that ensures their voices are heard and ideas valued. They want to talk without fear of retribution or being put down. The following ground rules will help ensure that happens:

- Be respectful
- One person speaks at a time
- Listen to one another
- Share “airtime” or step-up and then step back
- Speak for yourself, not for others and not for an entire group (use “I” statements)
- It’s OK to disagree, but don’t personalize it. Stick to the issue, not the person who is disagreeing with you
- Seek common ground. If you disagree, consider asking a question rather than arguing to prove your point

PRO TIP 3: THINKING/PROCESSING STYLES

- Processing styles are simply different ways people take in information and think about it. Basically, it is the way that best allows you to gather and use information.
- There is a difference between not understanding something versus not understanding how it was presented to you.
- Often when people seem to be in conflict it is really because they are talking about the same thing in different ways giving the appearance of a disagreement rather than a different perspective. Like two ships that pass in the night never meeting.
- A facilitator that understands these basic principles can spot these pitfalls and help the group or individual move through them by reframing, asking clarifying questions and highlighting common ground.

Mobility Management Self-Assessment Tool (MM-SAT)

The MM-SAT tool has five overarching dimensions that are important to organizing and sustaining a mobility management network. These elements or dimensions are based on a literature review, interviews with mobility management leaders, and findings from a study that NCMM conducted to identify the key components of mobility management networks ([Mobility Management State of the States Report, 2018](#)). Additionally, these dimensions are reflected in or modified from dimensions identified in sustainability assessment tools produced by other sectors (see appendices). The five dimensions are: 1) organizational infrastructure, 2) collaboration and coordination, 3) service delivery, 4) evaluation and continuous improvement systems, and 5) environmental impacts. The MM-SAT tool below provides a definition of each of these dimensions. Additionally, the tool includes targets under each dimension that can provide mobility management professionals with indicators or guidelines regarding what the dimension would look like in practice.

The scoring rubric included on the MM-SAT is based on feedback received from the field. The intent of the MM-SAT is to generate discussion between stakeholders that will lead to strategic decisions and actions that will both improve and sustain operations. It is not intended to be critical or punitive and neither NCMM nor FTA want to see it used or interpreted in that way. More importantly, this is a self-evaluation, not a mechanism for comparing other organizations, states, etc. against each other. Rather than using a numerical score it was determined that capacity was a more useful measure so three levels of capacity were identified to measure each sub target as defined below:

- 1. Emerging Capacity:** This level acknowledges that all organizations and services have a life cycle that must include a starting point. Your organization may be new or established with a plan to expand operations through a merger, new initiative, or service. In all cases, it will take time to grow capacity under each sub target and would not be reasonable to expect otherwise. Indicators common to this level may include an unfamiliarity with an issue or best practice identified in the MM-SAT, lack of clarity about how an issue is relevant to your organization, or an understanding that staff needs additional education/training to effectively address an issue. Other indicators may include a complete understanding of an issue, but a lack of resources to effectively address it. This may include time, funding, staff, stakeholder buy-in, policy issues and more.
- 2. Moderate Capacity:** This level reflects adequate understanding of and resources to support a sub target. Think of this as a level where the organization has hit its stride and is demonstrating results in meeting its mission. It will feel like a comfortable place for the organization in contrast to an emerging capacity which can at times feel overwhelming or fraught with insurmountable challenges. Indicators common to this level may include staff, partners and stakeholders mostly moving in the same direction with an understanding of how each fit into the whole, alignment of resources and policies, and consistent progress on related performance measures. Other indicators may include recognition of accomplishments tempered by an understanding that continual evaluation, innovation, and improvement are required to advance to the next level, a system for measuring progress (performance measures) is in place and the organization actively engages in strategic planning based on data so it has a roadmap to advance its capacity.
- 3. High Capacity:** This level demonstrates proficiency under a specific dimension or sub target but is slightly different in that it permeates other dimensions and sub targets. Day-to-day operations are not without challenges, but there is an overall feeling that the right system(s) are in place to address these challenges. The organizational culture embraces innovation, continual improvement and a team-approach to problem solving. Indicators common to this level include a robust system for measuring progress (performance measures), a comprehensive strategic plan that is regularly reviewed and updated, and well-defined systems that support a dimension or sub target. Other indicators include

regular needs assessments, an organizational culture that understands how each part impacts the whole, and a steadfast commitment to prioritize the customer.

As mobility management networks use the MM-SAT to assess their own program, consider how these overarching dimensions align with the characteristics of your network. Perhaps, these characteristics need to be amended to align with features of your network. Following the MM-SAT are lessons learned about implementation that can be useful as a network undertakes the assessment process. What is important to remember is that this self-assessment is not intended to grade or rank a particular mobility management network. Using the MM-SAT is an opportunity for network participants to understand the varying dimensions of the network, identify characteristics of the network that are established and those characteristics that can be developed.

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|--------------------------------------|---|-------------------|-------------------|---------------|
| 1 | Organizational Infrastructure | Organizational infrastructure consists of the systems, protocols, and processes that give structure to the organization, support its key functions, and routine practices. It also includes an organization’s systems for operations—from human resources, training, supervision, and communication systems to data, evaluation, and continuous quality improvement (CQI) systems. Note that service delivery infrastructure is not included under this dimension and will be address under Dimension 3. | | | |
| 1.a | Governance | This target examines the systems and processes by which the organization is directed, controlled, and held to account. Consideration should be given to leadership, how decisions are made, risk analysis, goal setting and accountability. Embedded in these considerations are the policies and procedures that should be in place to define roles, responsibilities, chains of command, etc. Many mobility management networks are umbrellaed by a lead agency that provides the governance structure. In this case consideration should be given to how the lead’s policies govern and impact your organization’s operations as well as structures your organization has put in place for itself. | | | |
| 1.b | Operating Systems & Procedures | This target examines the systems and procedures used in daily operations. Consideration should be given to financial accounting, office technology (computers, etc.) internal communication platforms, personnel management tools, procurement, information/data systems, etc. Indirectly related to this is the space in which the work is conducted and how it is organized to promote collaboration, safety, efficiency/productivity, etc. | | | |
| 1.c | Human Resources /Workforce | This target examines the structures and policies in place to recruit, hire, manage and retain employees. Consideration should be given to how staffing needs are identified, clarity of job descriptions and required qualifications and orientation/onboarding practices. Compensation and benefit packages should be evaluated for alignment with industry rates, local cost of living considerations, opportunities for advancement and the effectiveness of the systems in place to manage these benefits. Consideration should also be given to professional development opportunities, trainings, certifications, and a | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|---|--|-------------------|-------------------|---------------|
| | | coaching system for employees who are struggling with job requirements or performance. Workplace culture and policies should also be evaluated for effectiveness in promoting diversity, equity, and inclusion for all personnel. | | | |
| 1.d | Funding | This target examines how the organization funds both its operations and services. Consideration should be given to the organization's capacity to apply for and effectively manage government and charitable grants. It also should examine how the organization uses braided funding opportunities and innovative sources of match to maximize federal funding. | | | |
| 1.e | Communications (Internal) | This target examines how the organization communicates its mission, guiding principles, services, goals needs and more to board directors, staff, and volunteers so they have a clear and committed understanding of their roles and how they relate to operations and service delivery. It also should consider the way in which communication happens during day-to-day operations. In other words, how do supervisors communicate expectations, priorities, goals, etc. to their teams and how does the team itself communicate? | | | |
| | | | | | |
| 2 | Collaboration & Coordination | Coordinated transportation services are achieved when multiple entities work together in delivering one or more components of a transportation service so they can increase their capacity to provide trips, but coordination doesn't happen without collaboration. This dimension focuses on how the organization cultivates partnerships and creates or joins collaborative efforts that include transportation providers, state agencies, planners, and other stakeholders. Effective collaboration requires clear and transparent communication, group facilitation, a shared approach, public engagement, information sharing and above all, relationship building. It also requires a clear plan that defines how the coordination will work, delineates responsibilities, and identifies policy & procedures. | | | |
| 2.a | Use of CCAM | The Coordinating Council on Access and Mobility (CCAM) brings together Federal agencies to coordinate efforts and improve the quality, efficiency, and availability of transportation services for targeted populations while reducing costs and service fragmentation due to inconsistent program rules and a lack of | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|------------------------------------|--|-------------------|-------------------|---------------|
| | | interagency collaboration. CCAM’s primary goals seek to improve access to community through transportation, enhance cost-effectiveness of coordinated transportation, strengthen interagency partnerships and collaboration with state, local, and industry groups, and demonstrate innovative coordinated transportation. This target examines if and how Federal CCAM principles and resources are incorporated into your work as well as how you may have adapted these principles for your state and regional operations. | | | |
| 2.b | Coordinated Transportation Plan(s) | FTA requires that Enhanced Mobility for Individuals and Individuals with Disabilities (Section 5310) funded services be included in a locally developed, coordinated public transit-human services transportation plan, and that the plan be developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and nonprofit transportation and human services providers and other members of the public utilizing transportation services. These coordinated plans identify the transportation needs of individuals with disabilities, older adults, and people with lower incomes, provide strategies for meeting these needs, and prioritize transportation services for funding and implementation. This target examines if your plan(s) are current, complete and an effective tool for making coordination happen. | | | |
| 2.c | Local Coordination | This target builds upon 2.a & 2.b above but directs you to do a deep dive into the capacity and effectiveness of your own network(s) to do coordinated transportation. Consideration should be given to the structure and makeup of any councils/committees/etc. you use as well as how these structures support CCAM objectives, development of your coordinated transportation plans, needs assessments and innovative opportunities. It should also consider innovative partnerships with less traditional partners/sectors such as housing, economic development, public health, associations with similar goals/customers, etc. Active coordination between state agencies (DOT, DHHS, etc.) and local government units should also be considered for effectiveness, capacity, and opportunities for growth. | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|---------------------------|--|-------------------|-------------------|---------------|
| 3 | Service Delivery | This Dimension examines the delivery of services your organization offers and the experiences of customers/clients and stakeholders. It also examines the infrastructure, technology, collaboration, and communication required to effectively deliver the services. | | | |
| 3.a | Determining Need/Capacity | This target examines the steps taken by the organization to identify barriers to service, changing demographics and needs to expand capacity. It should include use of census data, regional and state needs assessments/studies, partner/stakeholder input about transportation needs within their sectors and customer voice. | | | |
| 3.b | Use of Technology | This target examines the systems and technology used to efficiently deliver mobility services. Consideration should be given to access and ease of use for customers, ability to integrate with other regional/state systems and modes of transportation allowing a customer to effectively plan trips from start to finish. Also consider how the organization plans for, procures, and implements new technologies – is there a technology plan or is it an ad hoc approach? Note, that your use of technology should be evaluated in proportion to the size and needs of your operation; not how other organizations with different circumstances approach it | | | |
| 3.c | Innovation | This target looks at how an organization identifies areas of improvement and its capability to embrace and make innovative changes to service delivery. Innovation should be considered in the broadest sense and in the context of your organization; meaning changes may be innovative or new to you. Examples of innovation may include use of technology, creation of a mobility management network, use of call centers, the integration of different modes of transportation that you had not previously used in your service delivery, the integration of public and private sectors, and more. | | | |
| 3.d | Multi-modal Integration | This target examines how multiple modes of transportation are integrated to help customers get where they need to go safely. Your organization may not have direct control over other modes or road improvements, but consideration should be given to steps taken to integrate modes, advocacy for road | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|--|---|-------------------|-------------------|---------------|
| | | improvements that improve access and safety for your customers and participation in policy initiatives such as Complete Streets. Mobility Management activities should be out front on these issues because system improvements create livable communities and increase the number of destinations that are accessible safely by public transportation, walking, and biking. | | | |
| 3.e | Communications (External) | This target examines how an organization communicates with customers, communities, policy makers and other stakeholders. This should include all the modes and platforms used to communicate (websites, social media, email, print, etc.) as well as content. Ideally, communication with policy makers, service providers and other stakeholders should be seen as critical to collaboration and should be tailored to the intended audience. Customer communication should be clear and without industry jargon and be accessible to non-English speaking customers and those with disabilities (see DEI below). | | | |
| 3.f | Diversity, Equity & Inclusion (DEI) | This target examines steps taken to ensure that transportation services are physically, geographically, and linguistically accessible and that a safe and inclusive experience is provided for all passengers regardless of race, gender, ability, background, or personal circumstances. This should include compliance with Title II of the Americans with Disabilities Act, Title VI of the Civil Rights Act, Title III.B of the Older Americans Act and other applicable federal, state, local and organization rules/policies. Consideration of impact and transparency of budget and service-related decisions that may disproportionately impact traditionally underserved populations especially, low-income, and people of color should be included. | | | |
| 3.g | COVID-19, Disasters, & other prolonged service interruptions | This target examines planning and steps taken to respond to prolonged service interruptions whether caused by a pandemic such as COVID-19, natural disasters, severe weather, workforce, economics, or other unforeseen challenges. Consideration should be given to disaster response plans, overall readiness, specialized equipment needs, system redundancy, plans for mutual aid and continuity of service. | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|--|---|-------------------|-------------------|---------------|
| 3.h | Travel Training | This target examines how new, or perspective customers learn to safely access and independently use your services. Consideration should be given to training materials and approaches that support the varied needs and abilities of customers. Some may only need information provided on a website or phone call while others may need a personalized approach or specialized training materials. | | | |
| 4 | Evaluation & Continuous Improvement Systems | This dimension examines the performance measures that you are using to evaluate your operation. This should include internal and external measures, how you organize and think about measures and how you collect and analyze data on each measure. | | | |
| 4.a | Performance Measures | This target examines the performance measures you have identified to see if they effectively tell the complete story of your organization and services. It also examines the tool you are using to organize or think about your performance measures (logic model, etc.). | | | |
| 4.b | Data collection | This target examines the systems that are in place to assist you in collecting and organizing your data so that it is meaningful and able to be communicated to policy makers, funders, and other stakeholders. | | | |
| 5 | Environmental Impact | This dimension examines the positive and negative impacts operation of your organization has on the environment and the strategies being used to promote positive and reduce negative impacts. It is understood that a mobility management network may have little direct control over environmental impacts because you operate out of a facility under another's control, are umbrellaed under a lead agency or perhaps do not operate your own fleet. If this is true you should evaluate the ways in which you can promote/influence environmental stewardship. This may include an environmental impact and value statements for your organization, steps being taken to reduce carbon emissions from your fleet, collaboration with local environmental efforts to promote public transportation, safe walking and biking as ways to reduce greenhouse gases, etc. The emphasis of this dimension is to underscore that | | | |

| # | Dimension | Focus | Emerging Capacity | Moderate Capacity | High Capacity |
|-----|-------------------------------------|--|-------------------|-------------------|---------------|
| | | there are steps that can be taken appropriate to your level to reduce environmental impacts and align with new federal IIA environmental policies. | | | |
| 5.a | Policy & Analysis | This target examines organizational policies, impact statements, environmental targets or values statements that prioritize the reduction of your operation's environmental impacts. It should examine steps taken to understand the environmental impacts of your operation and strategic initiatives to address those impacts. Consideration should also be given to the ways in which your organization supports or participates in environmental initiatives, policy development and advocacy. | | | |
| 5.b | Reduction of Fleet Carbon Emissions | This target examines steps the organization is taking to reduce carbon emissions of its fleet, or the fleet operated on its behalf. Consideration should be given to procurement policies or service agreements that use vehicles that have reduced carbon emissions or are electric, and the median age of vehicles in operation. This should also include efforts made to secure specialized funding that supports the purchase of environmentally friendly vehicles | | | |
| 5.c | Facility Modification | This target examines the environmental impacts of the facilities in which your organization and fleet operate, and steps taken to mitigate. Regardless of facility ownership consideration should be given to how your organization prioritizes and/or advocates for facility design modification to improve heating/cooling, air quality, runoff, etc. as well as hazardous waste, runoff, etc. from fleet facilities/operations. | | | |

Lessons Learned & Recommendations Regarding Implementation of the MM-SAT

- It is important that participants understand how sustainability is being used for the MM-SAT. While field testing indicated that groups understood the use of sustainability as a lens, some did not see a connection between sustainability and a particular sub target. For example, participants may understand the need for human resources, but not see how that connects to sustainability.
- While the MM-SAT is a self-evaluation tool, there is clear benefit to hiring an outside facilitator to lead an organization through the process. The facilitator is less likely to get bogged down in the “story” of your organization and can help participants stretch into the topics in the MM-SAT. Federal Highway has had similar experiences with the use of its Capability Maturity Framework and found outside facilitation was more effective. It is suggested that NCMM consider offering onsite technical assistance/facilitation and develop “train the facilitator” sessions to create a group of facilitators that understand the MM-SAT and can assist organizations throughout the country. ODOT also identified the potential for training their mobility managers so that they could facilitate the process in regions outside of their own.
- People take in and process information in different ways. In the case of the MM-SAT this has an impact on shared understanding of the dimension and sub target definitions. It can also be challenging to see one’s organization reflected in a larger context like the MM-SAT. A facilitator can help by reviewing definitions before engaging in discussion, reining in discussion that wanders into a related dimension or sub target, and reminding participants that the MM-SAT represents an ideal and best practices that is intended to be adapted to where an organization is at.
- Dimension 5 – Environmental Impact is a challenge for mobility management organizations/programs that do not maintain their own facilities, vehicles, etc. to see their role. This is a fair critique, but limits discussion about what the organization does have control over. Considering the MM-SAT is intended to be customized to fit the organization, participants should be encouraged to consider activities that the organization can engage in. For example, an organization may encourage a transit agency to electrify its fleet. It may also create its own employee policies and incentives that encourages biking to work, riding public transit or carpooling. In other words, focus on what you do have control over, and you will demonstrate capacity. Further, such efforts better position your organization to achieve environmental policy goals outlined in various Federal legislation.
- Developing an electronic version of the MM-SAT using a sophisticated survey tool like the one used by the State Office of Rural Health Proficiency Guide & Self-Assessment could standardize data collection for organizations conducting the MM-SAT. It also creates an opportunity for NCMM to access an anonymous version of this data which would help it identify technical assistance needs in the field.

Conclusion

Sustainability of mobility management networks is important since those professionals involved in the design and implementation of networks would want the network to endure and to last. A network that includes the dimensions identified in the MM-SAT may contribute to network longevity. However, a longitudinal analysis of the mobility management network would be important to affirm that the five dimensions, and targets, identified in this tool, are related to long-term sustainability. NCMM stands ready, through its technical assistance, to support states and regions to implement the MM-SAT and to support the ability of mobility management professionals to capture data about the dimensions of networks that contribute to longevity and impact.

Appendix A: Developing the MM-SAT: Using Models from other Sectors

Not surprisingly, there is a host of government and public minds thinking about the issue of sustainability across the spectrum of public services. It was only natural to turn to our Federal DOT to see what was already being done and how it could be adapted to the world of mobility management. An advisory team was established with members from the Federal Highway Administration (FHWA), Federal Transit Administration (FTA), and the Shared-Use Mobility Center (SUMC). After identifying how each was approaching sustainability work the team narrowed its focus to a review of two tools, one developed by FHWA called Capability Maturity Framework (CMF) and the other developed by SUMC called the Mobility Innovation Readiness Assessment Tool (MIRAT). It was clear that these two tools complimented each other and provided an effective framework for in-depth discussion and self-assessment at the organizational level.

As work began adapting these models to serve the needs of mobility management, Steve shared progress with the New Hampshire State Coordinating Council for Community Transportation (SCC) which had recently partnered with N.H. Department of Health & Human Services – Division of Public Health to develop, fund, and implement the N.H. Mobility Management Network. Alisa Druzba, administrator for (NH) Bureau Public Health Systems, Policy, Performance, and liaison to the SCC immediately saw similarities between the structure and goals of CMF and MIRAT tools and a tool developed by the National Organization of State Offices of Rural Health & Federal Office of Rural Health Policy to evaluate the capacity of rural health networks in each state. Alisa connected Judy and Steve to the National Organization of State Offices of Rural Health (NOSORH) who provided them with access to the State Office of Rural Health Proficiency Guide & Self-Assessment. Immediately, it was clear that despite slightly different language and focus areas between the three tools there was synergy. Further, FHWA, FTA, NOSORH, and NCMM realized that using each other to inform an approach to capacity building and sustainability in their respective sectors was building a critical connection between health and transportation.

To provide you with a better understanding of each tool see the following summaries:

Capability Maturity Framework (CMF)

- Federal Highway Administration
- The concept of a capability maturity framework emerged from the Strategic Highway Research Program.
- CMF was adapted from the software development world, the notion of capability maturity frameworks rest on the following three tenets:
 - Process matters. Projects fail or do not achieve desired functionality for variety of reasons unrelated to the technology.
 - Prioritizing the right actions is important: Examine if an agency is ready, how do they know, and what should they do next.
 - Focus on the weakest link: what is holding the agency back in becoming a leader in a particular area.

Mobility Innovation Readiness Assessment Tool (MIRAT)

- An initiative of AIM-Net, a partnership between the FTA and the Shared-Use Mobility Center.
- MIRAT's assessment function is intended to provide a framework for agencies to understand their own organization capabilities and be able to identify areas of improvements, as well as to help transit agencies design a roadmap to improve their organizational readiness for innovation based on their assessment of current conditions, the identification of areas of improvement, and the resources to take actions leading to accelerating innovation provided by the tool.

State Office of Rural Health Proficiency Guide & Self-Assessment

- National Organization of State Offices of Rural Health (SORH) & Federal Office of Rural Health Policy.
- The guide and self-assessment tool provide a framework for building capacity of state offices of rural health.
- SORH uses slightly different language than the transportation examples but shares the same core objectives.
- SORH uses target areas instead of dimensions and key elements which get scored under each target area. Scoring is organized under 3 levels: Needs improvement, competent, proficient.
- The self-assessment tool is administered through a Qualtrics survey platform that provides a numerical score of the SORH capacity and has sophisticated back-end analytic functions. NOSORH can congregate and report out data on regional, state, and national levels while masking the identity of respondents. This information helps them identify trends and determine technical assistance needs of the state offices.

Appendix B. Preliminary Feedback from the Field

Relying on models from other sectors, and research about the dimensions of mobility management networks, the team created a preliminary matrix to organize key dimensions and the method for assessing each. We elected to use ten dimensions from organizational operations, systems & technology all the way to environmental impacts. A statement describing the focus of each dimension was included to assist the user in understanding the operational components the dimension sought to measure. It seemed clear, but was it? Would a tribal mobility management program in the southwest understand the MM-SAT the way an urban system in Ohio might? Did we capture dimensions that were common to all mobility management programs, while still allowing for variations between programs? It was clear we needed to consult the field before going any further.

NCMM was scheduled to lead sessions at the 2021 Minnesota – Wisconsin Public Transportation Conference and the 2021 Arizona Statewide Transit Conference. Judy Shanley and Steve Workman developed a session that would focus on performance measures and sustainability for mobility management programs. The topics complimented each other and provided an opportunity to have participants work with the MM-SAT. Rather than a full test of the draft MM-SAT, the team decided to first test the field's understanding of sustainability in its broadest sense and its effectiveness as a lens to evaluate their individual programs. Next, participants were divided into small groups and assigned two dimensions each. For this activity we wanted to test the dimensions themselves for clarity, applicability, and ability to generate robust discussion amongst participants. We selected a tool often used in preliminary strategic planning called a Forcefield Analysis. We asked participants to apply two questions to their assigned dimensions: What forces support or positively impact this dimension of a thriving, sustainable mobility management program; and What forces are unsupportive or negatively impact this dimension of a thriving, sustainable mobility management program? Finally, we asked them to share what would make them more likely to use the MM-SAT to evaluate their own programs

The first thing we learned was that sustainability was an effective lens, but because it is a word most often associated with the environment it would be important to define it up front. When asked to initially define sustainability in relation to mobility management programs the following words or phrases were most generated by participants:

- | | | |
|---------------------|--------------------------|---|
| ▪ Keeping it going | Consistency | Organizational structure can sustain change |
| ▪ Continuous | Responsive | Meeting today's needs without compromising tomorrow |
| ▪ Adaptability | Ability to remain viable | |
| ▪ Long term success | Reliable | |
| ▪ Long Lasting | Self-sustaining | |

The Forcefield Analysis illustrated how various forces can support or negatively impact a dimension. As participants brainstormed forces at play within their dimensions, they were able to see that the number and/or size of unsupportive forces raised serious questions about long-term sustainability if left unaddressed. The table below is a sample of how two different groups identified forces impacting their dimensions.

| Dimension | Supportive | Non-Supportive |
|--------------------------------|-------------------------------|---|
| Organizational Capacity | Structure | Leadership Denial |
| | Leadership Buy-In | Resources and Size (Staffing) |
| | Resources and Size (Staffing) | IT (Lack of or Conflicting) |
| | IT | Bureaucracy |
| | Grant and Funding | Loss of Grant Funding |
| | Clear Goals/Objectives | Procurement Guidelines |
| | | Regulations |
| | Unclear Goals/Objectives | |
| Dimension | Supportive | Non-Supportive |
| Workforce | Continuous Training | Low Wages |
| | Civic Minded Employees | Driver Shortage |
| | Positive Culture | Poor Management |
| | Leadership | Unrealistic Schedule Demands |
| | Advancement | Lack of Technology/Tools |
| | Incentives | Lack of Communication: Frontline - Management |
| | Meet people where they are at | |

This preliminary work in the field was clearly beneficial. We were able to confirm some assumptions made during development leading us to believe we had the right framework, but we also found there was a need to simplify the tool. Initially we provided very short descriptions of each dimension to see if the dimension was universally understood. The Forcefield Analysis is a brainstorming activity that allowed us to see what concepts (forces) participants thought belonged under each dimension without giving them too much detail. While this provided for robust discussion, it was evident that there were too many dimensions and they had to be much more narrowly defined. The following are the key takeaways from our work with mobility management professionals representing Minnesota, Wisconsin, and Arizona:

- Sustainability is the right lens/framework but define upfront.
- Reduce the number of Dimensions and find a way to more clearly define/breakdown the focus areas under each.
- Simplify the “scoring” mechanism and avoid language that is punitive.
- An electronic version of the tool would be helpful in capturing capacity measures and participant feedback.
- For this to be a useful tool, it is important that it can be adapted to the local context.

Appendix C: Field Testing the Revised MM-SAT

The preliminary research that was done with professionals representing Minnesota, Wisconsin, and Arizona resulted in an improved design for the MM-SAT; however, it had not yet been tested as a finished tool. An effective tool would need to be able to scale and adapt to different organizational sizes, structures, and circumstances. The team believed the revised MM-SAT could do that but realized field testing was the only way to be certain. Field testing would also allow the team to develop an implementation guide to assist organizations with using the MM-SAT. It was decided to undertake two field studies using established mobility management networks because they were likely to have a stronger grasp on most of the dimensions and sub targets that newer organizations might not yet have.

The team already believed the MM-SAT could easily be adjusted for scale when evaluating a single organization. However, testing at a state and regional level was of primary importance because it would determine if the MM-SAT could be used to effectively evaluate larger networks with multiple organizations and providers. Ultimately the team selected two established mobility management networks, Ohio, and New Hampshire to test the MM-SAT. The Ohio Department of Transportation, Office of Transit, would use MM-SAT to evaluate its statewide Mobility Management Program. New Hampshire Alliance for Community Transportation, Region 10 of the Statewide NH Mobility Management Network, would use the MM-SAT to evaluate its regional operations. Each state represents different demographics and blends rural and urban characteristics. Neither state had tribal mobility management organizations. The Team recognized this limitation and attempted to address it, but timing did not allow. It is recommended that additional testing be done with a tribal mobility management organization to better understand what adaptations to the MM-SAT may be needed.

The field sites were given the MM-SAT matrix which included definitions for each dimension and sub target as well as the capacity scale (emerging, moderate, high). Limited directions were provided for conducting the evaluation and determining capacity. The team provided limited technical support to each site in advance of the evaluation to make sure there was a basic understanding of the matrix and intent of the tool. Both directions and technical support were limited because the team wanted to see how each site approached the MM-SAT, interpreted the defined dimensions and sub targets, and the experience of the participants. This approach allowed the team to better determine where MM-SAT needed clarification/revision and what type of technical support may be needed to support its use in the field.

Ohio Field Test: February 2022

Profile: The Ohio Program currently covers 67 of Ohio's 85 counties through 42 active mobility managers. Ohio DOT Office of Transit oversees the program and employs a statewide mobility coordinator to provide guidance to, and ensure compliance of, all mobility management programs funded through the agency.

Approach to MM-SAT: ODOT Office of Transit staff utilized the MM-SAT to determine strengths, weaknesses, opportunities, and challenges as the agency responsible for the Ohio Mobility Management Program. In addition, ODOT Office of Transit hosted a small roundtable of Ohio Mobility Managers to utilize the tool and assess ODOT Office of Transit's Mobility Management program from a subrecipients perspective. A total of seven (7) Mobility Managers serving across the state attended and participated in the roundtable.

Example Findings: ODOT has allowed NCMM to provide an example of how they collected data under Dimension 4 and related sub targets. You will note how they used the MM-SAT to collaboratively think about opportunities for improvement.

| Dimension 4 – Evaluation & Continuous Improvement Systems | | Score | Moderate Capacity |
|---|---|-------|-------------------|
| Description | This dimension examines the performance measures that you are using to evaluate your operation. This should include internal and external measures, how you organize and think about measures and how you collect and analyze data on each measure. | | |
| Strengths | ODOT Office of Transit requires Mobility Managers to submit updates quarterly that include the performance measures of their programs and the goals of the Coordinated Transportation Plans. ODOT is currently updating the quarterly reports to better collect performance measure and data. | | |
| Opportunities for Improvement | Overall ODOT Office of Transit, in combination with MMs self-assessed the dimension as Moderate Capacity for Evaluation and Continuous Improvement Systems. Opportunities for improvement identified through the MM-SAT process included: <ul style="list-style-type: none"> ▪ ODOT Office of Transit to develop and provide unified data collection requirements for all MM programs, locally and regionally. | | |
| Sub Target 4a - Performance Measures | | Score | Moderate Capacity |
| Description | This target examines the performance measures you have identified to see if they effectively tell the complete story of your organization and services. It also examines the tool you are using to organize or think about your performance measures (logic model, etc.). | | |
| ODOT Perspective | ODOT Office of Transit requires Mobility Management programs to submit quarterly reports that include outcomes and goal achievement based on the application goals submitted for each program. Currently the quarterly report is in the process of an update to better capture relevant data and performance outcomes of Mobility Management programs. | | |
| Mobility Manager Perspective | Recommend uniformed data collection requests. MMs are in support of the updated quarterly report format. | | |
| Sub Target 4b - Data Collection | | Score | Moderate Capacity |
| Description | This target examines the systems that are in place to assist you in collecting and organizing your data so that it is meaningful and able to be communicated to policy makers, funders, and other stakeholders. | | |
| ODOT Perspective | ODOT is working in partnership with Ohio’s 32 Mobility Managers to develop standardized and meaningful performance measures. ODOT is using input from the MMs to create a single data collection guide to be used statewide. The guide will be used to develop quantitative and qualitative performance measures for MMs. This guide will also be used to train new MMs as they come onboard. | | |
| Mobility Manager Perspective | Mobility Managers recommend an ODOT provided uniform data reporting system to be used locally and statewide, including guidance on data collection and best practices. MMs indicate this would be particularly beneficial for new MMs and new MM programs to start collecting data as soon as possible to determine program outcomes. | | |

Ohio's Experience Using the MM-SAT: ODOT was asked to report back on its overall experience using the MM-SAT and to highlight strengths of the tool and ways that it could be improved. The following is an edited summary of key findings reported to NCMM:

- The flexibility of the MM-SAT to be used at the local, regional, or state level will assist in determining the capacity and sustainability of mobility management organizations on multiple levels of program and organization management. Although this tool is specific to mobility management organizations it could be utilized by transportation providers as well. Overall, the ability to use this tool from multiple, different perspectives is a strength
- From a state DOT perspective, the MM-SAT provides a useful outline to help determine the capacity of an organization to administer a mobility management program, especially a new subrecipient prior to applying for program funding. It could also be used to guide new mobility management program goals and to educate host/lead organizations on the needs and strategies of the program.
- The dimensions provided forward thinking opportunities regarding mobility management programs and their role in implementing innovative practices and contributing to the environmental impact of transportation programs in the areas they serve. The five dimensions were relevant to the sustainability of the Ohio Mobility Management Program specifically and provided a guide that led to identified opportunities for improvement through discussion.
- Regular use of the MM-SAT would promote continuous improvement, innovative practices, and increased sustainability. The sub-targets alone could easily be used as a current 'snap-shot' discussion and/or as a best practice discussion for future goals.
- Utilizing the NCMM MM-SAT tool with mobility management subrecipients provided a valuable outside perspective for ODOT Office of Transit. However, from a mobility manager perspective, utilizing this tool on a state agency yielded sections that were not relevant but were internal to ODOT as an agency. However, mobility managers stated that those sections would be relevant if they were using the tool on their host agencies or smaller agencies.
- ODOT found this tool to be most useful when used collaboratively as a group. While ODOT Office of Transit would self-assess at one capacity, the mobility managements would self-assess at a different capacity providing valuable discussion and insight, most notably the recommendation of a unified data collection system for the program.
- The use of this tool is valuable. However, it could prove to be difficult to get buy-in from smaller organizations who have a small number of staff members or may view this tool as audit related. It may be useful to provide 'train the trainer' opportunities for those interested in hosting the discussion portions of this tool at local organizations. Additionally, virtual training for mobility managers would be valuable.
- While 'Facility Modification' was relevant to ODOT as a state agency, and is relevant to transportation providers, mobility managers found this topic to be irrelevant to their programs as most are not placed at transit agencies in Ohio. However, it did spark a discussion regarding what role MMs can or should take in facility modification advocacy and projects in the future.

NCMM Reflections on Ohio's Experience: ODOT demonstrated a highly effective use of the MM-SAT at a statewide level. It's choice to conduct the evaluation internally with ODOT staff followed by round table discussions with mobility managers demonstrated its willingness to receive feedback and empowered the field to share perspectives that might differ. Application of SWOC Analysis

(strengths, weaknesses, opportunities, and challenges) provided an effective framework for analysis of each sub target and generated data points that could be used in the future to develop new strategies. NCMM believes that these data or discussion points are ultimately more valuable than assigning a level of capacity. The process highlighted the challenge to adapt the MM-SAT between large organizations like ODOT and stand-alone mobility management programs that may not be directly responsible for things included in the dimensions and sub targets. Rather than eliminate such things from the discussion, they focused on how something outside of their control can impact their operation and how they could communicate that to a lead organization such as ODOT.

New Hampshire Alliance for Community Transportation Field Test: February 2022

Profile: NH Alliance for Community Transportation (ACT) is the state-designated Regional Coordination Council for Southeast New Hampshire. ACT’s mission is to facilitate the implementation of coordinated community transportation and encourage the development of improved and expanded regional community transportation services. ACT’s service area covers 38 communities, including all of Strafford County, eastern Rockingham County, and Wakefield and Brookfield in Carroll County. ACT is comprised of transportation providers, human service agencies, health care providers, municipalities, planning commissions, and one citizen member.

Approach to MM-SAT: ACT first reviewed the MM-SAT with its leadership team to see if there were any initial questions or clarifications needed and the approach it would take. Leadership decided on two 3-hour sessions to complete the self-assessment. The sessions were exclusively online due to inclement weather that occurred both days. Seven members attended the sessions, in addition to the Region 10 Mobility Manager who limited his participation to allow more time for members to speak.

Example Findings: NCMM received approval from ACT to publish the table below.

| Dimension 2 – Collaboration & Coordination | | Score | Moderate to High Capacity |
|--|--|-------|---------------------------|
| Description | Coordinated transportation services are achieved when multiple entities work together in delivering one or more components of a transportation service so they can increase their capacity to provide trips, but coordination doesn’t happen without collaboration. This dimension focuses on how the organization cultivates partnerships and creates or joins collaborative efforts that include transportation providers, state agencies, planners, and other stakeholders. Effective collaboration requires clear and transparent communication, group facilitation, a shared approach, public engagement, information sharing and above all, relationship building. It also requires a clear plan that defines how the coordination will work, delineates responsibilities, and identifies policy & procedures. | | |
| Sub Target 2a – Use of CCAM | | Score | High Capacity |
| Description | The Coordinating Council on Access and Mobility (CCAM) brings together Federal agencies to coordinate efforts and improve the quality, efficiency, and availability of transportation services for targeted populations while reducing costs and service fragmentation due to inconsistent program rules and a lack of interagency collaboration. CCAM’s primary goals seek to improve access to community through transportation, enhance cost-effectiveness of coordinated transportation, strengthen interagency partnerships and collaboration with state, local, and industry groups, and demonstrate innovative coordinated transportation. This target examines if and how Federal CCAM principles and resources are incorporated into your work as well as how you may have adapted these principles for your state and regional operations. | | |

| | | | |
|---|--|--------------|----------------------------------|
| Key Discussion Points | <ul style="list-style-type: none"> ▪ Judy Shanley’s (NCMM) visits to the SCC have spurred good discussions. ▪ The CCAM Braided Funding Guide doesn’t provide enough detail on program appropriations by state, and federal agencies aren’t always practicing these coordination principles ▪ Responsibility for CCAM-type initiatives have been pushed down to local agencies ▪ Coordination principles are being used in our region (they predate CCAM) but aren’t tied back to CCAM | | |
| Sub Target 2b – Coordinated Transportation Plan(s) | | Score | Moderate to High Capacity |
| Description | <p>FTA requires that Enhanced Mobility for Individuals and Individuals with Disabilities (Section 5310) funded services be included in a locally developed, coordinated public transit-human services transportation plan, and that the plan be developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private, and nonprofit transportation and human services providers and other members of the public utilizing transportation services. These coordinated plans identify the transportation needs of individuals with disabilities, older adults, and people with lower incomes, provide strategies for meeting these needs, and prioritize transportation services for funding and implementation. This target examines if your plan(s) are current, complete and an effective tool for making coordination happen.</p> | | |
| Key Discussion Points | <ul style="list-style-type: none"> ▪ Plan is always in place, current, updated in a timely fashion ▪ Strafford & Rockingham Planning Commissions work together to draft the Coordinated Plan ▪ Historically, public participation has been limited to the several surveys conducted for each update: consumers, transportation providers, local welfare officers, non-transportation agencies working with populations likely to have unmet needs. ▪ Focus groups can help improve response rates. Funding for focus groups was awarded in an FTA 5305e grant to both the planning commissions for this update ▪ Users and potential users could use better outreach ▪ The Coordinated Plan isn’t necessarily the key to making coordination happen and having funding tied to Plan can be hampering by preventing point-in-time opportunities | | |
| Sub Target 2c – Local Coordination | | Score | Moderate to High Capacity |
| Description | <p>This target builds upon 2.1 & 2.2 above but directs you to do a deep dive into the capacity and effectiveness of your own network(s) to do coordinated transportation. Consideration should be given to the structure and makeup of any councils/committees/etc. you use as well as how these structures support CCAM objectives, development of your coordinated transportation plans, needs assessments and innovative opportunities. It should also consider innovative partnerships with less traditional partners/sectors such as housing, economic development, public health, associations with similar goals/customers, etc. Active coordination between state agencies (DOT, DHHS, etc.) and local government units should also be considered for effectiveness, capacity, and opportunities for growth.</p> | | |
| Key Discussion Points | <ul style="list-style-type: none"> ▪ Are there less traditional partners that could be pulled in? ▪ State/Fed could do more to encourage (or require) broader participation ▪ NHDHHS is at table but not yet fully engaged ▪ ACT has started a push to get existing clients to use a common application to determine if there are additional services they might qualify for ▪ Has ACT’s/system’s development reduced ADA demand? <ul style="list-style-type: none"> - COAST’s contract with the City of Portsmouth has reduced ADA demand there - Common Application may increase demand as more users apply that otherwise might not have ▪ Housing Agencies house lots of people at a high density. How do we best partner with them? <ul style="list-style-type: none"> - Providing Travel Training to their residents - Do they have ARPA funds that could support transportation? - Portsmouth served by Fixed Route and ADA, PST. Dover served by CAP, Fixed Route, ADA - Are there incentives from HUD to participate? | | |

| | |
|--|---|
| | <ul style="list-style-type: none"> - COAST has put route-specific maps at sites - CAP gives residents flyers, but doesn't have much direct contact with Housing Authorities ▪ How to get clients plugged into more services? ▪ CAP agencies can't share client data with each other |
|--|---|

Experience Using the MM-SAT: ACT was asked to report back on its overall experience using the MM-SAT and to highlight strengths of the tool and ways that it could be improved. The following is an edited summary of key findings reported to NCMM:

- ACT Members found that the MM-SAT prompted good, thought-provoking discussion. Ultimately, they felt it was useful to take time to review ACT's strengths and weaknesses, but it was a challenge to convince members to set aside time for multiple sessions to complete the MM-SAT. For some, using this time to focus only on a self-assessment felt like a lost opportunity.
- While the focus of the MM-SAT is on sustainability, members felt that their discussions did not stay within a sustainability framework. Instead, they discussed each dimension/sub target as it was written rather than using a sustainability framework.
- Facilitation was challenging at times because members would often focus on assessing the environment in which ACT functions rather than on ACT itself. For example, funding is impacted by conditions outside of ACT's control (federal, state, local funding, the pandemic, inflation, etc.). Similarly, discussion often turned to addressing identified shortcomings which is a useful next step, but a challenge to remained focused on the evaluation itself.
- ACT intends to follow-up on the issues identified during the assessment and will incorporate these issues into its Coordinated Plan update. Members felt that the MM-SAT process would better facilitate this if it included a process for identifying salient points and ranking or prioritizing work on each.
- ACT did not formally identify which dimensions or sub targets members were most interested in addressing, but the following areas did elicit the most action-oriented discussion:
 - Setting benchmarks to provide context for existing data collection
 - Using data and benchmarks to develop storytelling materials
 - Creating performance measures that address hard to measure outcomes (better health, seniors living in their homes longer) rather than just outputs (trips, unduplicated riders)
 - Using focus groups and/or services to determine if the Community Transportation Directory and Common Application are clear and without industry jargon
 - Transitioning from passive outreach (website, brochures in the usual places) to proactive outreach to address DEI shortcomings
 - Developing a more formalized plan for finding and assessing opportunities for innovation
 - Including focus groups in the region's Coordinated Plan update
 - Revisiting ACT's outdated Service Gap Analysis
- Members offered the following feedback about some of the dimensions and sub targets:
 - Sub Target 2.c was viewed as the most relevant topic and could have been elevated above the others.

- Sub Targets 3.a through 3.c also seemed more important than others and organized to reflect this.
- Funding is an important issue when considering sustainability; however, it felt like it was minimized by putting it under Dimension 1 – Organizational Infrastructure with other topics like HR procedures.
- ACT members value coordination principles but didn't believe that tying it back to CCAM did much for ACT's sustainability.
- There was overlap in discussion for many of the sub targets. Members felt that that the sub targets could be tighter.
- Dimension 5 – Environmental Impact was considered by members to be beyond the scope of what a region in a small urban area could reasonably focus on given state funding, population density, and existing infrastructure.

NCMM Reflections on ACT's Experience: ACT also demonstrated an effective use of the MM-SAT, but at a regional level with different dynamics. Whereas ODOT worked with its staff and its mobility managers, ACT is a council composed of diverse stakeholders and perspectives including a mobility manager and lead organization (COAST). Rather than a deficit, this multitude of perspectives is a strength, but it requires more work to ensure a shared understanding of a dimension or sub target upfront. The time ACT's executive committee spent preparing to undertake the MM-SAT was beneficial in helping the larger group get to a place of shared understanding. Still, some differing opinions about meaning or role required compromise within the group so that it could move through the evaluation. While little guidance was given to the field sites about how to use the results of the MM-SAT, ACT determined from the outset that it would use it to inform the next version of its coordinated plan. Connecting MM-SAT to a required activity such as the coordinated plan helped participants come to terms with investing several meetings in evaluation.

