
Technical Memorandum No 2

Lake County Mobility Management Plan

Lake County Inter/Intra County Paratransit Transportation Plan

Prepared for:

Lake County Coordinated Transportation Services Committee

Prepared by:



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with Fish Transportation Group**

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Section I: Introduction

This Technical Memorandum No. 2 documents the results of Tasks 4-6 of the Lake County Inter/Intra County Paratransit Transportation Plan project. These tasks include the establishment of an institutional framework for paratransit coordination in Lake County, development of operational mechanisms and the development of an implementation plan for paratransit coordination in Lake County. This memo follows Technical Memorandum No. 1 (February 2010) which described the results of the first phase of the project, which included an update of the inventory of public transportation services available in Lake County, interviews with key stakeholders, and the results of a series of meetings and workshops with the LCCTSC designed to identify current service gaps and overlaps in preparation for the development of options and recommendations for initial and future service improvements.

This memorandum describes the Lake County Mobility Management Plan for improving the coordination of paratransit services provided to Lake County residents. The overall goal of the project is to identify a structure for coordinating demand response transportation in Lake County for two scenarios:

- Improve services today assuming no new resources available (i.e., “initial activities”), and
- Identify and prioritize improvements should new resources become available (i.e., “future activities”).

Lake County Division of Transportation (DOT) obtained a grant to conduct the study from the Regional Transportation Authority (RTA). The grant was matched by Lake County and many of the townships. The planning effort was led by the Lake County Coordinated Transportation Services Committee (LCCTSC or Steering Committee), assisted by the consulting team of TransSystems and Fish Transportation Group. As part of the planning process, a Working Group was formed (a subset of the LCCTSC) to provide additional guidance.

Section 2: Overview of Mobility Management

Through the project activities it became clear that paratransit in Lake County would benefit from creation of a “mobility management” program, which could evolve and expand as coordination opportunities and resources were identified. The Federal Transit Administration (FTA) defines mobility management as consisting of “short-range planning, management activities and projects for improving coordination among public transportation and other transportation service providers with the intent of expanding the availability of services.”

Mobility management is a broad term that is used to cover a number of activities. Mobility managers can be individuals who help customers identify transportation options, plan trips and perhaps make arrangements for those trips, or entities that have a wider range of responsibilities aimed at improving coordination among transportation programs and services and increasing mobility options.

The National Resource Center for Human Service Coordination (NRC) describes mobility management as “a process of managing a coordinated community-wide transportation service network”:¹

- Focusing on individual needs, not on moving the masses
- Offering a full range of travel options to the single-occupant auto
- Focusing on innovation, changing usual business practices
- Cultivating partnerships and multi-agency activities
- Offering a single point of access for customers to multiple travel modes
- Applying advanced technologies
- Coordinating community-wide planning with transportation influencing land use and zoning decisions
- Ensuring transit-friendly designs in long-range plans
- Receiving business community and voter support as well as local governmental support

The rest of this document describes the guiding principles, institutional framework, operational mechanisms, and basic business plan for developing a mobility management program to enhance paratransit coordination in Lake County. Guidance about how to structure and staff activities needed to move paratransit coordination forward in Lake County was provided to the consultant at the LCCTSC August 18, 2010 meeting. The decisions from that meeting are incorporated in this revised version of the document and they provide a springboard into the next steps of development of coordinated paratransit services in Lake County.

¹Available on-line at: <http://web1.ctaa.org/webmodules/webarticles/anviewer.asp?a=372&z=78>, July 7, 2010.

Section 3: Guiding Principles

The LCCTSC adopted the Mobility Management Guiding Principles listed on the next page at their May 19, 2010 workshop.

The purpose of the Guiding Principles is to formally describe the core features of the mobility management program that have been adopted as a priority for Lake County. The Guiding Principles should be used as the benchmark for initial and future coordination activities, including development of the institutional framework, operational mechanisms, and the business plan that guide the day-to-day activities of the Mobility Management function. Over time, the Guiding Principles can be revisited as conditions may change; however, they provide an excellent starting point to guide the process and inform the community for the foreseeable future.

The LCCTSC Mobility Management Guiding Principles emphasize the importance of developing and following the Inter/Intra-County Paratransit Plan. They also focus on serving persons who are considered to be “transportation disadvantaged,” particularly seniors, people with disabilities, and low-income individuals. The LCCTSC also addressed the need to be fiscally responsible and to maintain eligibility for potential federal funding by ensuring compliance with the ADA and other regulatory initiatives.

The Guiding Principles include support for other public transportation initiatives and all modes of transit, including fixed route bus and rail services, along with becoming involved in regional planning initiatives. This holistic perspective is important because paratransit services are inherently more expensive to operate on a per-trip basis than fixed route bus and rail, making it important for a network of accessible service options to be available allowing trips to be provided by the least costly, most effective means possible. Establishment of a robust transit system allows paratransit to provide the service in areas where traditional transit is not effective as well as having paratransit service available in other transit served areas for those who cannot use traditional transit. The current network of transit service puts a disproportionate reliance on paratransit for non-auto mobility in Lake County.

The discussions and resulting Guiding Principles related to the geographic distribution of trips also help to focus the mobility management effort. Clearly there is a need to develop transportation alternatives for un-served and under-served areas within Lake County, and there also is an acknowledgement of the need to coordinate with neighboring counties to facilitate trips that cross township and county boundaries.

The Guiding Principles underscore the desire to identify and work with the network of service that is currently provided, to avoid duplication and fragmentation of services, and to provide cost-effective solutions for coordinating and sharing resources.

The next two steps in the process of implementing a mobility management program in Lake County are closely related: identifying an institutional framework (or organizational structure) and operational mechanisms to support development of the business plan.

LCCTSC Mobility Management Guiding Principles

Adopted May 19, 2010

Mobility Management in Lake County will:

1. Work to implement the Inter/Intra-County Paratransit Plan that we are currently developing
2. Work to provide the opportunity for borderless public transportation to be available for Lake County residents who are transportation disadvantaged with a priority for:
 - A. Seniors
 - B. People with disabilities
 - C. Low-income individuals
3. Encourage the development of transportation services that are:
 - A. Compliant with the Americans with Disabilities Act (ADA)
 - B. Cost-effective, efficient, and reliable
 - C. Reduce duplication and fragmentation of services
 - D. Financially sustainable over time
 - E. Responsive to demand for trips (i.e., provide adequate capacity)
4. Support the development of all public transportation services in the county including:
 - A. Coordination with paratransit services provided through townships, municipalities, dial-a-rides, ADA paratransit, and human service agencies
 - B. Research and develop appropriate alternative transportation services (such as taxi subsidy programs, volunteer-based programs, and others)
 - C. Coordination with and improvement of Pace fixed route and ADA paratransit services
 - D. Coordination with and improvement of Metra rail service and stations
 - E. Coordination on a regional level with groups such as the Regional Transportation Authority (RTA) and the Chicago Metropolitan Agency for Planning (CMAP)
5. Work to close the geographic and temporal gaps in borderless public transportation services including:
 - A. Areas that are un-served and under-served
 - B. Intra-county connections
 - C. Inter-county travel with neighboring counties
6. Work with transportation service partners to:
 - A. Refine/coordinate paratransit eligibility to avoid duplication and fragmentation of services
 - B. Explore options for achieving greater service coverage by coordinating hours of service, sharing vehicles, sharing rides or other strategies
 - C. Share other resources (such as insurance, vehicle maintenance, technology)
 - D. Support effective cost-allocation strategies to ensure a fair and equitable distribution of costs for shared/coordinated services

Section 4: Institutional Framework

The term “institutional framework” refers to the organizational structure of the mobility management program. To help determine the institutional framework that would work best to implement coordinated paratransit services in Lake County, it is helpful to identify some of the common differences between mobility management strategies and traditional transit operations.

- Traditional transit service focuses on moving vehicles. Mobility management focuses on moving individuals.
- Traditional transit service focuses on developing productive routes that carry large numbers of people to common origins and destinations. Mobility management programs focus on finding solutions for individual travel needs which may not fit easily into traditional transit services.
- Transit agencies generally focus on the services that they are responsible for operating (e.g., fixed route bus and ADA paratransit services). In contrast, mobility managers work with a network of transportation providers to find solutions that address the travel needs of their target market(s).

Although mobility management programs are often based in a transit agency, that is not always the case. Some transit agencies, such as the Transit Authority of River City (TARC) in Louisville, Kentucky, have chosen to take an active role as mobility managers. In other communities, such as Franklin County, New York, the mobility management program is located within a county department. Other areas, such as Colorado Springs, have developed mobility management programs housed in local councils on aging.

A variety of county-based mobility management models are emerging in the Chicagoland area. DuPage and Kane counties have implemented paratransit coordination efforts. McHenry and Will counties are also exploring coordination and mobility management options and both McHenry and Lake counties are supporting paratransit demonstration projects. Regional coordination and mobility management efforts also are beginning to develop under both Chicago Metropolitan Agency for Planning (CMAP) and the RTA, and Pace is exploring options for regionalizing its ADA paratransit and Dial-A-Ride call centers.

One of the first questions that must be answered in order to move forward with paratransit coordination in Lake County is “who will take the lead role to advocate for and implement coordinated paratransit services in Lake County?”. This decision is the first implementation step needed.

Options:

There are several potential options for lead agencies that have been identified including the LCCTSC, Pace, Lake County (DOT or other department), township transportation coordinators or one of the non-profit agencies that serve customers in the target market populations. Broadest support continues to be for either Pace or the County to host the technical assistance aspects of the mobility management function based on their transportation expertise and their geographic coverage respectively.

The LCCTSC was formed as an entity to provide the forum and the direction to advance coordinated paratransit in Lake County. Recent activities of the LCCTSC have advanced this cause significantly in the past year. The LCCTSC provides broad representation of the key stakeholders for paratransit coordination on the committee including transit agencies, townships, and broader area social service agencies. This entity can be the guiding force behind paratransit coordination should adequate technical and staff resources be available to support advancement of paratransit coordination. Ultimately, a subset of this group – consisting of participants in paratransit coordination, could become the governance structure for broader paratransit coordination in Lake County. However, at this time, the LCCTSC as a whole is well suited to provide the influence and advocacy to get paratransit coordination up and running in Lake County if backed up by technical and logistic support.

Transit agencies frequently take on the mobility management role, however when interviewed during this project, Pace staff indicated that their policy has been to focus on service operations rather than to become the mobility manager because of the policy / political implications that are inherent in the start up of coordinated service. They are supportive of mobility management efforts and have become participants in the DuPage and Kane coordinated paratransit services, and are currently working with McHenry and are likely to be a key partner there as well.

There are obvious limitations with township-based paratransit and taxi services becoming the lead agency. They have inherent limitations in their scope, focusing on their residents who live within jurisdictional boundaries facing limited funding resources. While the townships may make ideal mobility management partners, they are not likely to be the best choice for leading the effort. Additionally, none of the townships have expressed an interest in becoming the county-based mobility manager during the course of this project as of this time although significant interest remains on the part of many townships to ultimately participate in a coordinated paratransit structure when a framework is established.

There are also several non-profits that might be potential sites for a mobility management program (e.g. Lake County Center for Independent Living, Countryside Association, Catholic Charities, and others), they, too, may more appropriately be mobility management partners than lead agencies. None of these groups has expressed an interest in leading the effort.

Lake County is another logical participant in the mobility management function. By definition there is full county coverage. They are involved in local and regional planning efforts, not a public transportation service provider, and are eligible to apply for funding through the Regional Transportation Authority for the New Freedom; JARC; and Innovation, Coordination, and Enhancement (ICE) programs. Through discussions with LCDOT, there is openness to consider the county taking on some mobility management functions – primarily of a technical assistance nature - at the conclusion of this study. It is a function that could reside at LCDOT, or may be more appropriately housed at another county department at some time in the future.

Current Plan:

At the August 18, 2010 LCCTSC meeting, it was determined that an initial partnership between the LCCTSC and the LCDOT be pursued to execute the needed mobility management

functions described in this document. The LCCTSC will provide the policy and advocacy components of the mobility management function and that the LCDOT will provide up to full time staff support. Additionally, LCDOT will provide the ability to apply for and receive grants on behalf of the LCCTSC.

Over time, this partnership may need to be revised to reflect the developments and advancement that have taken place. Once there are active participants in the coordination activities, the group of participants, possibly a subset of the LCCTSC, will become the group that provides the guidance and governance. The overall involvement of the full LCCTSC may still be warranted to continue advocacy and expand the level of participation throughout the county. The involvement of LCDOT or other county department may also change over time. It should be expected that there will be evolution of functions as more and more coordination takes place.

The next sections address operational mechanisms as well as a business plan for moving ahead with paratransit coordination in Lake County.

Section 5: Operational Mechanisms

When the LCCTSC adopted its Guiding Principles, it also adopted the LCCTSC Mobility Management Partnership Initial Operational Mechanisms statement, which outlines the desired approach for developing the partnerships and implementing a Mobility Management program in Lake County.

The Operational Mechanisms will serve as an initial work plan for the Mobility Management function. Given the start-up nature of the effort, it was decided that two time horizons would be addressed;

- (1) initial (start-up) efforts, and
- (2) future efforts, to be undertaken once the Mobility Management initiative gained traction and additional resources.

Over the course of this project, three categories of mobility management activities were identified;

- (1) information
- (2) planning
- (3) operations

The first two items – information and planning – will primarily be the responsibility of the Mobility Management function, with input and support from the partners. The third item – operations – will primarily be the responsibility of the partners as they agree to make specific program changes to support coordinated services. These activities could range from changes in fares, service hours or days; vehicle sharing, centralized call center functions, depending on the outcome of the ongoing planning effort. The Mobility Management function would be able to provide technical support and guidance for these items. If further progress can be made during this project on who and how the Mobility Management function will be fulfilled, additional implementation detail can be developed.

As described in the Guiding Principles, all activities under a Mobility Management program would be performed so as to meet reporting and eligibility requirements for federal funding. The initial and future activities for each element of the operational mechanisms (i.e., information, planning, and operations) as adopted by the LCCTSC at its May 19, 2010 meeting are described below.

At the August 18, 2010 meeting a collaborative effort between the LCCTSC and the LCDOT to jointly execute the mobility management functions was discussed and determined. Lead and support roles for many of the Operational Mechanisms developed and discussed throughout the project were assigned. These roles are listed with each of the actions below.

I. Information

The LCCTSC identified the following sets of initial and future activities to support information-related efforts to be undertaken by the Lake County Mobility Management program.

A. Initial activities

- I. Collect transportation information from agencies throughout Lake County to include in a resource database. Samples of information clearinghouse data are included in Attachment A.
 - LCDOT will lead this effort under the direction of the LCCTSC. They will rely on other existing sources such as United Way, RTA, Pace and all providers to collect accurate data and develop a way to routinely update this information to be able to benefit many providers and call centers in the region.
2. Disseminate information in print, via the Internet, and in accessible formats
 - LCCTSC will guide the direction of this effort, and the execution of the task will be done by LCDOT. This will require interactions with current providers that are interested in coordination to make sure that the dissemination meets their needs.
3. Promote the use of public transportation through local initiatives including presentations and educational forums with customers, other stakeholders, and the public
 - LCCTSC will develop the plan for outreach. LCDOT will assist in the development and provision of materials to be used for these many audiences.

B. Future activities

- I. Develop a central point of contact for information related to transportation resources in Lake County, which may also include:
 - a) Trip planner function to directly connect customers to the most appropriate services available
 - LCCTSC will be responsible for development of the policy guidance for LCDOT in the development of this activity
 - b) Travel training for customers to learn to use fixed route bus and rail services in lieu of more costly paratransit and other demand response services
 - These services are currently being provided by the LCCIL. Under direction of the LCCTSC these services could potentially be expanded.

2. Planning

The LCCTSC identified the following sets of initial and future activities to support planning-related efforts to be undertaken by the Lake County Mobility Management program.

A. Initial activities

- I. Work to implement items from the Inter/Intra County Paratransit
 - LCCTSC will have primary responsibility for guiding implementation of the plan, with the technical and logistic support of LCDOT.

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2. Coordinate with regional/local transportation and land use planning efforts (such as Community Development Block Grants (CDBG), Job Access and Reverse Commute (JARC), New Freedom, United Way, and other sources)
 - LCDOT has primary responsibility for identifying and acting on these issues in concert with the direction of the LCCTSC.
 3. Develop performance measures for service effectiveness and efficiency to support data-driven analysis and decision-making. Examples of performance measures for coordination are shown in Attachment B.
 - LCDOT will have the primary role in developing these measures for the policy approval of the LCCTSC. They will be key to being able to quantify and understand the effectiveness and efficiency of paratransit coordination.
 4. Coordinate with Pace, Metra, and other transit operators to realign operating characteristics of currently available transportation services to more accurately reflect the needs of Lake County residents (e.g., service hours, days, service area boundaries, fares, eligibility)
 - LCDOT will have the primary role in interfacing with the agencies and operators to gain better coordination.
 5. Work to secure funding to sustain paratransit services
 - All partners will be responsible for identifying options for supplemental funds.
 - LCDOT will provide staff support for pursuit of these funds at the direction of the LCCTSC.

B. Future activities

1. Work to implement items from the Inter/Intra County Paratransit
 - LCCTSC will have primary responsibility for guiding implementation of the plan, with the technical and logistic support of LCDOT.
2. Refine identification of and approach for meeting unmet local needs
 - LCCTSC will have the primary role for advancing these discussions. LCDOT will provide staff and technical assistance.
3. Facilitate joint agreements for service coordination/delivery with partnering agencies. A sample joint agreement is shown in Attachment C.
 - LCCTSC will have the primary role in facilitating and initiating these types of agreements and LCDOT will provide staff and technical assistance.
4. Coordinate with Pace and other regional coordination efforts to identify and maximize the use of new and existing technologies
 - LCDOT will have primary responsibility for this coordination and has the responsibility to keep the LCCTSC apprised of developments that could impact coordination potential.

3. Operations

The LCCTSC identified the following sets of initial and future activities to support operations-related efforts to be undertaken by the Lake County Mobility Management program.

A. Initial activities

1. Work to implement items from the Inter/Intra County Paratransit Plan
 - LCCTSC will have primary responsibility for guiding implementation of the plan, with the technical and logistic support of LCDOT.
2. Adopt clear definitions for transportation eligibility based on:
 - a) Seniors – aged 65 and older (unless there is a programmatic requirement for something different)
 - b) People with disabilities – using a standard definition from the ADA (note that this is not the same as ADA paratransit eligibility, which is based on a person’s functional ability to use fixed route service)
 - c) Low-income individuals – based on existing qualifying factors such as eligibility for the Circuit Breaker program, LHEAP energy assistance program, Medicaid or others (Note that agencies will likely maintain responsibility for determining eligibility for their program participants, but will be asked to share information as needed.)
 - LCCTSC will be responsible for recommending guidance with the technical support of LCDOT. Ultimate responsibility lies with the subgroup of providers involved in coordination activities.
3. Ensure that services are compliant with ADA requirements (e.g., equivalency requirements for services other than ADA paratransit services)
 - LCDOT will have primary responsibility for seeking technical guidance (from Pace and others) on this issue.
4. Establish more uniform fares to facilitate coordination and ease of use
 - LCCTSC will be responsible for recommending guidance with the technical support of LCDOT. Ultimate responsibility lies with the subgroup of providers involved in coordination activities.
5. Facilitate joint agreements for initial service coordination with partnering agencies for specific activities such as:
 - a) Providing back-up service for other agencies’ trips (e.g., providing rides for another agency if a vehicle is not available)
 - b) Providing adequate documentation for program ridership and performance monitoring, as well as invoicing
 - LCCTSC will be responsible for recommending guidance with the technical support of LCDOT. Ultimate responsibility lies with the subgroup of providers involved in coordination activities.

B. Future activities

1. Work to implement items from the Inter/Intra County Paratransit Plan
 - LCCTSC will have primary responsibility for guiding implementation of the plan, with the technical and logistic support of LCDOT.
2. Facilitate interagency agreements that permit riders to be transported across jurisdictional boundaries (e.g., townships), with trip subsidies based on residency. These are typically Memorandum of Understanding type of agreements between units of government.

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- LCDOT will have primary responsibility for implementing agreements at the direction of LCCTSC.
3. Facilitate joint agreements for advanced service coordination with partnering agencies for specific activities such as:
 - a) Commingling trips from different funding sources on the same vehicles to avoid duplication and fragmentation of services offered within the same area
 - b) Coordinating operating schedules to maximize service availability in particular areas (e.g., adjusting service hours to provide longer service hours within a particular area)
 - c) Providing centralized call-taking and scheduling
- LCCTSC will be responsible for recommending guidance with the technical support of LCDOT. Ultimate responsibility lies with the subgroup of providers involved in coordination activities.

Based on the Operational Mechanisms identified by the LCCTSC, the initial Mobility Management program will focus on information and planning activities. Specifically, there is a need to generate and maintain updated information about available transportation resources and to make that information available in print and via the Internet, making sure that the materials are provided in accessible formats as well. The initial information effort also includes presentations and outreach efforts with local organizations and agencies serving customers who are transportation disadvantaged.

The initial planning activities are in support of the Inter/Intra County Paratransit Plan described here. The Mobility Manager will need to become involved with regional/local transportation and land use planning efforts to begin to raise awareness about the Mobility Management program and to integrate planning efforts. It will be especially important to work with the various townships and service providers to begin to form a county-wide perspective on serving the transportation disadvantaged population and to actively coordinate with Pace, Metra, and other transit operators to realign operating characteristics of currently available transportation services to more accurately reflect the needs of Lake County residents (e.g., service hours, days, service area boundaries, fares, eligibility). Over time the Mobility Management function should emerge as a leader in the coordination planning efforts undertaken in the county and region.

The next step in the process is to develop a Business Plan, which will outline the steps necessary to implement the Mobility Management program envisioned for Lake County.

Section 6: Business Plan

The Business Plan is a step-by-step guide for launching the Mobility Management function and for implementing the Guiding Principles and initial Operational Mechanisms needed to ensure success. The Business Plan does not extend specifically into the future activities as these will unfold as resources are made available and local interest and support dictates. The basic Business Plan elements include the following elements:

1. Identify lead agency
2. Establish advisory committee
3. Estimate costs
4. Secure funding
5. Hire staff
6. Implement work plan (operational mechanisms)

Lead Agency

An essential first step of implementation is to identify what entity will be providing the Mobility Management function. As discussed previously, there are several key characteristics that are needed:

Willingness to start something new – Launching coordination takes the ability to influence others to participate and to be able to help others see the benefits of participating. No coordination will take place unless this is true.

Geographic coverage – best if the entity to provide the Mobility Management function is at least as broad as Lake County.

Ability to apply for grants – the Mobility Management function itself can be eligible to receive federal funds to support it. Additionally, resources to implement services or coordination functions will need to be sought from grant sources.

Ability to enter into contracts – At a certain stage of development, the Mobility Management function could be expected to enter into contracts with providers to deliver services. Any lead agency needs to have that authority and ability.

Action Plan: At the August 18, 2010 meeting, it was determined that LCCTSC will function as the lead agency from a policy guidance perspective and that they will be supported with technical assistance and organizational structure by LCDOT for grant application and contracts.

Governance Structure

A governance structure needs to be set up to guide the activities of the Mobility Management function. It is not likely that the Mobility Management function will include operating any services. As a result, all decisions made by the Mobility Management function, by definition,

have impacts on all of the entities that are paying and providing for services. A simple to express example might be the decision to standardize the definition of a senior (to make coordination simpler across agencies). This could have a significant impact on a township or municipality being asked to reduce or expand the population eligible for services, and they need to be part of that decision process to keep them part of the coordinated system.

The governance structure should be made up of representatives from the entities that are participating in the coordinated paratransit service. Providers who do not choose to participate in coordination activities should not expect to have decision authority over the direction of the Mobility Management function. Service providers that do not become part of the coordinated system could still participate as a deliverer of services under contract to the Mobility Management function.

Any governance structure that is established needs to create a set of documents that clearly identify the roles and responsibilities of this group. This could be informal documents, but often it is a set of bylaws that guide the conduct of the group. Without a clear cut set of responsibilities, it is difficult for a group of individuals to continue to guide to direction of an operational entity.

Action Plan: Governance will initially be the responsibility of the LCCTSC, but it may transition to a subgroup or other structure developed by the parties whose service is part of coordinated paratransit. This structure will need to evolve to meet the changing needs. Currently the goal is to identify participants who would benefit and be willing to operate their services in a coordinated way to improve mobility options to their residents. Over time, the issues will be more operational in nature and primarily guided by the participants.

Costs

Initial start-up costs should be relatively modest and will include the following items:

- **Staff** – one full-time manager (salary range from \$40,000 to \$60,000, depending on qualifications and level desired)
- **Office space** – preferably existing space that can be used as in-kind match for grant funds (in-kind)
- **Equipment** – computer, printer, and phones – possibly some of this also could be in-kind
- **Software** – Microsoft Office suite and related software for office and database applications
 - Mobility management technology can range from a commercial database (\$5,000 to purchase and set up) to a custom-designed web-based directory (\$50,000) to a high-end system that incorporates other components such as automated reservations/scheduling/dispatching, Automatic Vehicle Location and Mobile Data Terminals for vehicles, and access over an Interactive Voice Response system (\$1 million and over).
(During the planning phase Pace noted that it has a lot of advanced technologies already in place or in the planning phase so it would be important to coordinate with Pace to determine software and hardware needs.)

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- **Supplies** – printing and paper for distributing information related to the program
 - Alternative formats such as Braille and large print should be included in the estimates

Funding

It is important to identify and secure adequate funding to launch the Mobility Management function and allow sufficient time for the Mobility Management function to identify sustainable funding (at least one year).

Action Plan:

- Certain (non-operating) mobility management activities are eligible to be funded as a “capital expense” at an 80 percent match rate by the FTA through its Job Access and Reverse Commute (JARC) and New Freedom programs. Excerpts from the relevant FTA circulars are included in Attachment D.
- The RTA has ICE funding available to help launch new and innovative services.
- Lake County DOT has committed to provide staff time to help launch the Mobility Management function and is willing to consider funding matching costs of future grants.

Staff

Many Mobility Management programs start with one full-time manager, with some in-kind or part-time help provided by an administrative assistant. Over time – or when service is expanded – the program may grow into its own small department or call center program.

A generic mobility manager job description is shown on the next page. Real job descriptions are also included in Attachment E. The generic job description illustrates the range of activities that may be undertaken by the Mobility Manager and helps to explain why it is important to select someone with the skills and passion needed for the job. Mobility Managers typically have a college degree and several years of transportation and/or human service experience. Given the requirements of the job, salaries may range anywhere from \$30,000 to \$60,000 or more, plus benefits.

Action Plan: The decisions made at the August 18, 2010 meeting identify an initial shared responsibility between the LCCTSC and the LCDOT staff. The mobility management functions will be split with the LCCTSC providing policy guidance and influence and LCDOT providing staff support and technical assistance. LCDOT will look to Pace and RTA as the regional transit experts for assistance with technical assistance.

Work Plan

The basic Work Plan has been laid out in the Operational Mechanisms section. The LCCTSC and LCDOT will need to closely coordinate to keep activities moving and refining the work plan. The work plan should include measurable goals and objectives, along with timelines for accomplishing each element.

Visibility is important because the Mobility Manager is intended to become the focal point of the community. A clearly recognizable identity – name, local, “look” for publications – should be a top priority for the new Mobility Manager. This would include development of fact sheets, desktop icons linking to the information center, and developing contacts with the agencies that will be supporting the Mobility Management efforts. A sample fact sheet is included in Attachment F.

Sample Generic Mobility Manager Job Description

SCOPE OF WORK:

The mobility manager in a transportation organization serves the general public through conceptualization, planning, developing and operating programs that respond to and influence the demands of the market. These actions and supportive strategies are performed directly or in collaboration with others in order to provide a full range of travel options that are more effective in meeting needs and more efficient through reasonable pricing.

This position is responsible to improve business and community support for the transportation organization. It will require the development and distribution of information that explains how to utilize the available resources in meeting the diverse travel needs of the market it serves.

Some skills, abilities and competencies that enhance the performance of this position are:

- Change agent
- Innovative thinker
- Collaborative partnerships
- Conflict resolution
- Persuader
- Communicator
- Initiator
- Visionary
- Problem solver
- Leadership
- Negotiator
- Mediator
- Empathy
- Customer focus
- Team builder
- Management skills

ESSENTIAL JOB FUNCTIONS:

Below is a list of actions that are required in the fulfillment of the duties:

- Develops and directs the design, production and distribution of specific marketing materials directed at employers, employees, human service agencies and other entities;
- Serves as the liaison/salesperson to community leaders in an effort to demonstrate how transportation enhances economic development;
- Provides direct outreach to area employers and employment agencies to gain support for employer and employee transit programs;
- Researches, develops and writes grant applications for future funding;
- Plans annual conference on issues relating to transportation;
- Develops potential for future expansion of transit options across municipal boundaries;
- Plans and coordinates special promotional events and activities related to general public transportation;
- Makes public presentations on the benefits of mobility management for the community;
- Builds supportive community networks;
- Leads in the design of operational functions that are nontraditional in service delivery;
- Is familiar with technological advances that increase travel options and/or convenience;
- Is knowledgeable about techniques that foster transit ridership through links with land development.

Source: <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=372&z=78> (7/ 7/10).

Section 7: Next Steps

The next step of the Lake County Inter/Intra County Paratransit Transportation Plan project is to work with the Advocacy work group of the LCCTSC to develop a generic presentation for the LCCTSC to be able to ‘take the show on the road’ to seek support of various providers to participate in paratransit coordination. Key items to be covered in the presentation include:

- Plans for moving forward
- Identification of the benefits of coordinating paratransit services
- Details of the impact on the specific township or other operator (this will be developed at a later stage of the project)

It has been decided that the best way to seek participation in the paratransit coordination process is to identify some key areas where there are entities that continue to be interested and participate in implementing coordination through the LCCTSC. It is important to find areas that have several types of service in place in order to be able to have the potential to benefit from coordination. Two areas have been identified at this preliminary stage for consideration of further coordination efforts. These include:

- SE Lake - including services in Libertyville, Vernon, West Deerfield and Moraine Townships
- NW Lake including services in Grant, Antioch, Lake Villa and Avon Townships

Attachment A

Sample Information Clearinghouse Data

Information Clearinghouse functions can range from simple printed handbook material to more sophisticated database applications. In either case, the typical information collected includes:

- **Service Area**
- **Type of Service**
- **Provider Information (phone number, address, e-mail, website address)**
- **Days and Hours of Operation**
- **Fares**
- **Advance Reservation Requirements**
- **Ridership Restrictions or Eligibility Requirements**
- **Routes Maps**
- **Number and Type of Vehicles with ambulatory and wheelchair seating**

Examples follow.

Manitowoc County Mobility Management Transportation Resource Directory

Bridging Resources to Better Meet
Transportation Needs

Presented in part by:



About This Directory

The Manitowoc County Transportation Resource Directory was put together by the Manitowoc Mobility Manager. The Mobility Management Project is a cooperative effort to coordinate transportation needs, services, and programs through several public and private organizations including Maritime Metro Transit and the Manitowoc County Aging and Disability Resource Center. This binder is presented in part by Manitowoc's One-Stop Transportation Call Center: a referral source for all of your transportation needs.

The resource directory was designed in an effort to increase transportation opportunities for Manitowoc County residents by informing individuals of the various options available to them. In the directory you will find information on: transportation services and providers, paratransit programs, Medical Assistance, volunteer opportunities, and in-home services.

Please note that the information provided is subject to change. Any questions, concerns, or comments may be directed to the Manitowoc Mobility Manager:

Linda Grider
Mobility Manager
4319 Expo Drive
Manitowoc, WI 54220
Phone: 920-683-5111



Questions for Passengers

1. Is there a bus stop near your home? (this is always the most affordable option-buses are 100% accessible and will kneel to curb level for easy boarding)

-Information on Maritime Metro Transit's fixed-route bus system is available on page 3-5

-Travel companions are available for new riders who would like help becoming comfortable and familiar with the bus system, please see Bus Buddy section on page 12-1

2. Can you take a cab? (note: for ambulatory passengers only-cabs are not equipped to transport passengers in wheelchairs)

-Maritime Cab and Delivery: 686-1300, see page 4-15 for more information

3. Have you asked a friend or relative?

4. If you are affiliated with a church have you called and asked if there is a volunteer who can take you?



Brandt Buses, Inc.

Description of Service: School bus service, charter and rental service for birthdays, weddings, etc.

Riders Eligible: Anyone

Accessible: Yes

Service Area: Manitowoc County and beyond (does not travel out of state)

Hours of Operation: As needed

Cost: 1.29 per mile + \$10.30 per hour, \$75 minimum

For more information or to schedule a ride, contact:

Brandt Buses
71 Albert Dr.
Manitowoc, WI 54220
Phone: 920-682-8823

Executive Coaches of Wisconsin, LLC

Description of Service: Luxury bus service for special events and occasions

Riders Eligible: Anyone

Accessible: No

Service Area: State of Wisconsin

Hours of Operation: 24/7

Cost: Call for price quote

For more information or to schedule a ride, contact:

Executive Coaches of Wisconsin, LLC
7017 CTH JJ
Manitowoc, WI 54220
Phone: 920-374-1406

N.E.W. Coaches

Description of Service: Motor coach service for charters and tours

Riders Eligible: Anyone

Accessible: No

Service Area: State of Wisconsin

Hours of Operation: 24/7

Cost: Call for price quote

For more information or to schedule a ride, contact:

N.E.W. Coaches
P.O. Box 116
Two Rivers, WI 54241
Phone: 920-793-8393

Limousine Services

Stardust Limousine LLC

Phone: 920-682-5767, toll free 1-800-392-5767
Email: stardust@stardustlimousine.com
Website: www.stardustlimousine.com

Executive Coaches of Wisconsin, LLC

7017 CTH JJ
Manitowoc, WI 54220
Phone: 920-374-1406

Presidential Limousine Services

1915 Jefferson St.
Two Rivers, WI 54241-2619
Phone: 920-793-1039

Go Airport Connection

Phone: 920-683-3683, toll free 1-800-236-5450
Email: info@goairportconnection.com
Website: www.mkelimo.com

Car Rentals

Enterprise Rent-A-Car

4611 Expo Drive (Inside the First Chrysler showroom)
Manitowoc, WI 54220
Phone: 920-652-9994, toll free 1-800-RENT-A-CAR
Website: www.enterprise.com

Lulloff Rentals, LLC

1401 Washington St.
Manitowoc, WI 54220
Phone: 920-682-0121, toll free 1-800-236-3893
Email: glulloff@lsol.net

U-Save Auto Rental

1015 S. 26th St.
Manitowoc, WI 54220
Phone: 920-682-8024, toll free 1-888-872-8311
Website: www.usave.com

Wheelchair Accessible Rentals and Vehicle Modification

A&J Mobility

333 Washington St.
Valders, WI 54245
Phone: 920-775-9333, toll free 1-888-775-7750 (Extension 704)
Email: administrator@aandjvans.com
Website: www.aandjmobility.com, www.ajvans.com

Ferry

Lake Michigan Car Ferry

(Daily crossings from Manitowoc, WI to Ludington, MI mid-May through mid-Oct)
900 S. Lakeview Drive
Manitowoc, Wisconsin 54220
Phone: 920-684-0888 , toll free 1-800-841-4243
Website: www.ssbadger.com

Airport

Manitowoc County Airport

(Full service for corporate, transient, student and rental pilots)

1805 Freedom Way, Manitowoc, WI 54220

920-683-4594

Magnus Aviation 920-682-0043

Elderly Program

Description of Service: Curb-to-curb transportation for elderly persons residing in Manitowoc County. Assist-to-Transport is the contracted provider for this service.

Riders Eligible: Certified users 65 and older who are ambulatory.

*To obtain an application visit www.maritimemetro.com, call 920-683-4560, or stop into the Maritime Metro Transit office at 915 S. 11th St.

Wheelchair Accessible: No

Service Area: Manitowoc County

Hours of Operation: M-F 8am-4pm, no service on weekends or holidays

Cost: One-way fares:

Local trips-\$2

Rural trips longer than 10 miles-\$3

Meal Sites-\$0.75

For more information or to schedule a ride, contact:

Maritime Metro Transit Intermodal Transfer Center

915 South 11th Street

Manitowoc, WI

Phone: (920) 683-4560, TDD# 1-800-947-3529

Fax: 920-686-5020

Email: mail@maritimemetro.com

Website: www.maritimemetro.com

*If you are certified and need to schedule a ride, call Assist-to-Transport at 920-682-8820.

Maritime Metro Transit ADA Specialized Transportation

Description of Service: Curb-to-curb service (door-to-door available for an additional charge) for certified users with disabilities unable to use Maritime Metro Transit fixed-route bus service for 1 or more of the following reasons: 1. unable to use a fully accessible mode of transportation, 2. able to use accessible transportation, but accessible transportation is not available, 3. there are environmental barriers (distance, terrain, weather) or architectural barriers (such as lack of curb ramps) under public control, preventing the individual from getting to or from accessible transportation. Assist-to-Transport is the contracted provider for this service.

Riders Eligible: Certified users (see above paragraphs for requirements)

*To obtain an application visit www.maritimemetro.com, call 920-683-4560, or stop into the Maritime Metro Transit office at 915 S. 11th St.

Wheelchair accessible: Yes

Service Area: Trips must be within $\frac{3}{4}$ of a mile from the bus route in Manitowoc or Two Rivers.

Hours of Operation: M-F 5am-8pm, Sat 9am-4pm, no service on Sundays or Holidays.

Cost: \$3 one-way, an additional \$2 each way for door-to-door pick-up.

*Personal care attendants ride free

For Additional Information, Contact:

Maritime Metro Transit Intermodal Transfer Center
915 South 11th Street
Manitowoc, WI
Phone: (920) 683-4560, TDD# 1-800-947-3529
Fax: 920-686-5020
Email: mail@maritimemetro.com
Website: www.maritimemetro.com

*If you are certified and need to schedule a ride, call Assist-to-Transport at 920-682-8820.

Rural Disabled Program

Description of Service: Curb-to-curb and door-to-door transportation for disabled or non-ambulatory individuals residing in rural Manitowoc County. Assist-to-Transport is the contracted provider for this service.

Riders Eligible: Certified users (for persons disabled or non-ambulatory residing in the rural areas of Manitowoc County).

*To obtain an application visit www.maritimemetro.com, call 920-683-4560, or stop into the Maritime Metro Transit office at 915 S. 11th St.

Wheelchair Accessible: Yes

Service Area: Manitowoc County

Hours of Operation: M-F 8am-4pm, No service on weekends or holidays

Cost: Rural disabled bus route- \$1.75
Non-route- \$4.50

For more information or to schedule a ride, contact:

Maritime Metro Transit Intermodal Transfer Center
915 South 11th Street
Manitowoc, WI
Phone: (920) 683-4560, TDD# 1-800-947-3529
Fax: 920-686-5020
Email: mail@maritimemetro.com
Website: www.maritimemetro.com

*If you are certified and need to schedule a ride, call Assist-to-Transport at 920-682-8820.

Bus Buddy Program

What is a bus buddy?

A travel companion matched with a new rider to help them become comfortable and familiar with the bus system.

Who can request a bus buddy?

Anyone interested in Maritime Metro Transit and its routes can ask for a Bus Buddy.

Is there a fee for a buddy?

There is no charge for this service. Bus Buddies are volunteers who want to help new Maritime Metro Transit riders.

When do buddies ride?

Buddies are available during regular MMT hours of service.

Can I become a bus buddy?

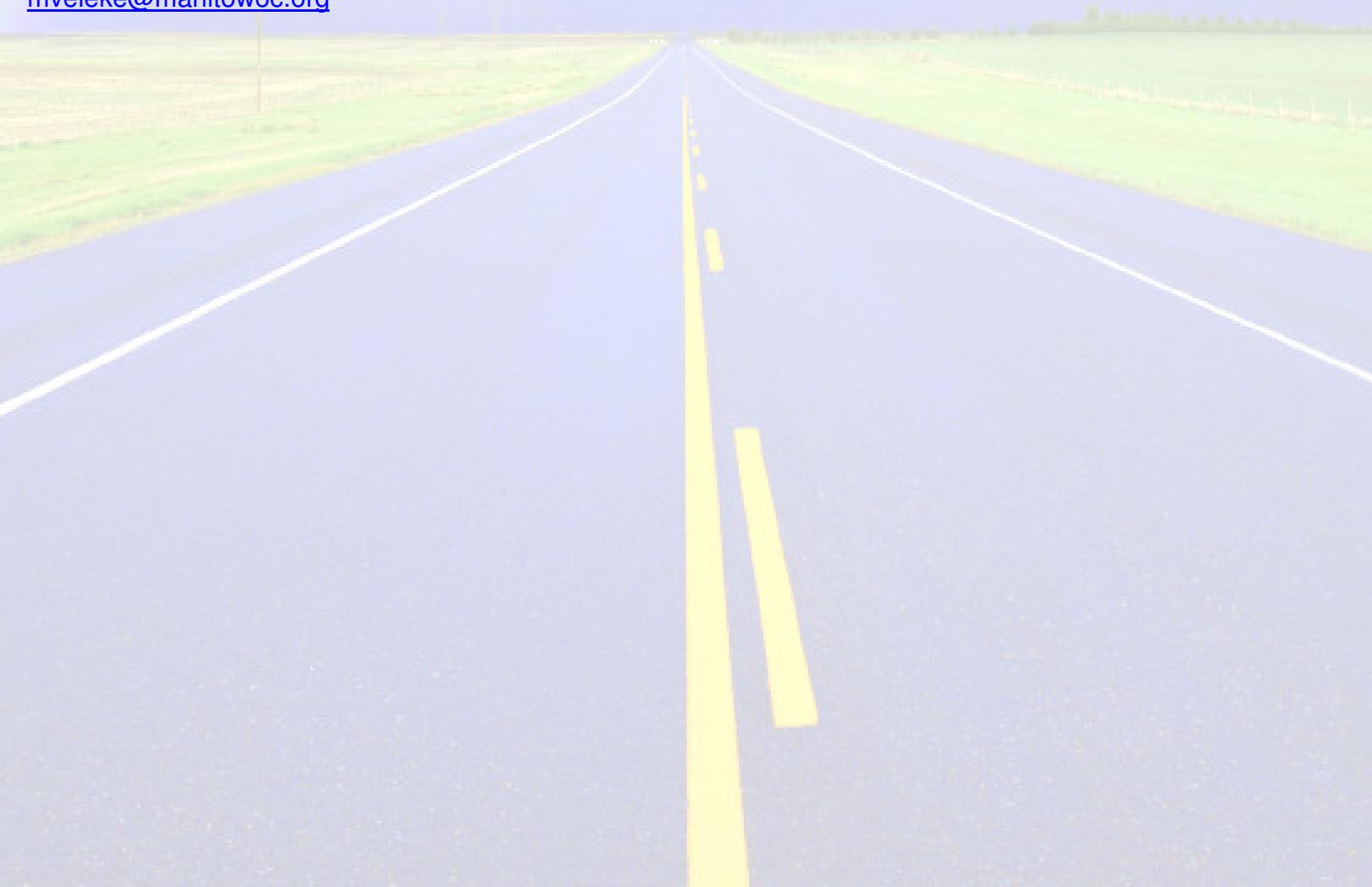
Yes! Buddies are volunteers who enjoy riding the bus and helping others. Training is provided. Call for Info.

Contact:

Maritime Metro Transit

920-683-4560

mveleke@manitowoc.org



Volunteer Opportunities

Benefits of Volunteering

Volunteering has a meaningful, positive impact on your community. But did you know that it can have many benefits for you too? Here are some reasons to volunteer:

- Feel needed and valued
- Be an active part of the community
- Enhance your resume
- Discover new interests and hobbies
- Meet new people
- Inspire others

Volunteer Opportunities

Bus Buddy: Becoming a Bus Buddy is an excellent opportunity to help others in the community by teaching them how to ride the bus, please see page 12-1 for more information.

Volunteer Driver: Make a tremendous contribution to the community by becoming a volunteer driver. Volunteer drivers assist elderly and disabled individuals with transportation for medical appointments, shopping, and other activities. Volunteers may donate as little or as much time as they feel able. Call Linda Grider at (920) 683-5111 for more information or to request an application.



In-Home Services

	Phone	Home Health Aide	Companion Homemaker	Transport Charge	Other Services
Annee Time Assistance	920-686-9421	Costs can vary no min.	Costs can vary no min.	per mi.charges	Non-Medical as needed Caring Companion Care Escort to appointments Errand service Grocery shopping Light housekeeping Laundry Services Activities (structured) Daily "TLC" Phone Calls Organizational Assistance Verbal cueing Medication reminders Meal prep and planning Monitor safety while bathing Assistance with bill paying Assistance with pet care Referral services Incidental Transportation Travel companion
At Home Assistance, LLC	920-973-2404	Costs can vary no min.	Costs can vary no min.	per mi.charges	Costs can vary with services
*Calumet **Medical Center#	849-7505	\$16.00 Per Hr Minimum	None	\$.50 per mi.	Drop In Service Telephone reminders
Caregivers Home Health	686-9222 Chilton: 849-7183	\$20.25 1 hr. min.	\$13.25 1 hr. min	\$.35 per mi.	\$17.75 Bathing Service

2 Caring Hearts	920-860-1646	Costs can vary no min.	Costs can vary no min.		<p>Non-Medical as needed Caring Companion Care Escort to appointments Errand service Grocery shopping Light housekeeping Laundry Services Activities (structured) Daily "TLC" Phone Calls Organizational Assistance Verbal cueing Medication reminders Meal prep and planning Monitor safety while bathing Light Yard Work Assistance with pet care Incidental Transportation</p> <p>Travel companion</p>
Comfort Keepers	(920) 458-2806 1-800-788-1078	Call for cost	Call for cost	Varies	<p>Non-Medical Incidental Transportation Errand Services Grocery shopping Light housekeeping Laundry Services Medication Reminders Meal Prep. Grooming, Bathing & Hygiene Toileting & Incontinence Feeding/Special diets Dementia Care Respite Mobility Assistance Transferring & Positioning Live-in & 24 hour care</p>
*Holy Family Memorial Homecare	320-8441	\$17.40 Minimum 1 hr. min.	\$13.60 Minimum 1 hr. min.	\$.50 per mi.	In-home Beautician Services
Helping Hands	684-4357	Call for cost	Call for cost	Included in quote	<p>Non-Medical Errand service Grocery shopping Light housekeeping Meal prep Activities (structured) Travel companion</p>
HomeCare Health Services	684-7155	\$16.50 Wkdy \$17.00 wkend 1 hr. min.	\$13.00 2 hr. min.	\$.25 per mi.	<p>Alzheimer Specialist Staff Shopping Service</p> <p>Caring Companion Errand service Grocery shopping Light housekeeping</p>

					Meal prep and planning Activities as needed Assistance with bathing Assistance with bill paying
Home Instead Senior Care	(920) 482-0653	Call for cost	Call for cost	Varies	Non-Medical Caring Companion Care Escort to appointments Grocery shopping Light housekeeping Assist with laundry/ironing Assist with Pet Care Medication Reminders Meal prep and planning Monitoring of safety while bathing Assistance with bill paying Mobility Assistance Incidental Transportation



Glossary

accessible: a general term used to describe the degree to which a product (e.g., device, service, environment) is accessible by as many people as possible. An accessible vehicle accommodates passengers with disabilities and meets requirements for lifts, ramps, and securement systems as specified in the Federal Code of Regulations.

ADA: The Americans with Disabilities Act, or ADA, is a congressional bill that was signed into law by the George H.W. Bush in 1990. The ADA is designed to protect people with physical or mental disabilities from discrimination in employment, housing, education, and all other public services. Under the ADA, a disability is characterized as being "a physical or mental impairment that substantially limits a major life activity."

ambulatory: capable of walking.

charter bus: a bus transporting a group of persons on a common purpose trip, under a single contract, at a fixed price. The contracting party acquires the exclusive use of a bus for its passengers to travel together under a single itinerary.

curb-to-curb: riders are picked up at the curb in front of their residences and dropped off at the curb of their destination.

demand responsive: refers to the kind of transit service where a passenger requests a ride from a specific location at a certain time.

door-thru-door: the passenger receives assistance with getting ready, getting to the vehicle, getting off the vehicle, and getting inside the destination.

door-to-door: the passenger receives assistance getting from their door to the vehicle and getting off of the vehicle and to the door of their destination.

fixed-route: refers to transit services where vehicles run on regular, pre-designated, pre-scheduled routes with little or no deviation.

intermodal: those issues or activities which involve or affect more than one mode of transportation, including transportation connections, choices, cooperation and coordination of various modes.

kneeling bus: a feature on a bus which lowers the floor to the curb or to near-curb level to make it easier for passengers to board, especially for senior citizens and persons with disabilities.

medical assistance: please see medical assistance section (pg. 10-1)

mobility manager: a mobility manager responds to and influences the demands of the market by undertaking actions and supportive strategies, directly or in collaboration with others, to provide a full range of options by coordinating transportation efforts throughout a county, municipality, or region. Mobility managers help customers find ways to move from place to place according to their need while helping transportation providers maximize the utilization of all their resources.

non-accessible: not equipped to accommodate passengers with mobility devices or wheel chairs.

non-ambulatory: unable to walk about.

paratransit: demand response transportation service available for disabled and elderly persons unable to use the fixed-route bus service. Paratransit can include smaller vans or buses.

volunteer driver program: services that use unpaid assistants or drivers to provide transportation.

CHAPTER 2. EXISTING REGIONAL TRANSIT INFORMATION SYSTEMS – CASE STUDIES

This chapter describes the experiences to date with selected coordinated transit information systems in Texas and elsewhere in the United States, including operations, development history, and lessons learned.

BUS-STOP.ORG, NORTH TEXAS TRANSIT COOPERATION ASSOCIATION, TEXAS

Bus-stop.org is the result of a demonstration project organized and led by the North Texas Transit Cooperation Association (NTTCA) and the Services Program for Aging Needs (SPAN) to promote coordination among transit providers in the Dallas-Fort Worth area (2). Fixed route and paratransit providers, along with social service agencies, were invited to join in the effort by providing their information to the database, and monthly meetings of all participants contributed to the development process. The website database and interfaces were developed with the aid of a consultant for a total cost of \$10,000 (*Telephone interview with Erika Lissberger, SPAN/NTTCA, February 5, 2002*).

The website allows users to search for transit options by county, by type of service, or by service agency name (Figures 2 and 3). Limited trip planning is possible by entering the counties of trip origin and destination. If there is a transportation provider that serves locations in both counties entered, the applicable routes and stops will be listed (Figure 4). If, however, there are no transportation providers serving both the origin and destination county, the contact information for transit providers in the “origin” county is provided, with the message that the agency(s) have no routes to the destination county. The website provides telephone numbers, addresses, and (where applicable) e-mail and website addresses for each participating agency. Other information provided includes hours of operation, fares, and restrictions for ridership, if any.

Information updates can be performed by each participating agency, using a database personal identification number (PIN) for access. Updates and maintenance of the site have been limited, partially due to a lack of continued funding, but future plans are to resume the monthly meetings of participants and to explore funding for further development of the site and for dedicated staffing.



Figure 2. Bus-stop.org Main Page.



Figure 3. Transit Service Selection Options, bus-stop.org.

home
transit options
route maps
current events
shuttles
special services
about us
contact us



bus-stop.org
We take you from **A** to **B**

Choose your destination here!

transit options

Your source for transportation in North Texas.

Origin: Denton
Destination: Tarrant

Your trip may require more than one agency. The agency listed below is responsible for transportation where your origin is located, and the table below lists points where this agency travels in the area you have chosen as a destination. For more information, please contact the agency listed here.

Denton
SPAN, Inc
Contact: Erika Lissberger
Phone: 940-382-1900
FAX: 940-383-8433
Dispatch Phone: 940-382-1900
Email: sharono@Span-transit.org
Website: www.span-transit.org

need more?

[plan another route](#)
[more about this agency](#)
 Other Entities from **Denton**
 that Travel to **Tarrant:**

Choose Another Agency
▼

Other Locations in **Tarrant:**

Points of Interest
▼

Destinations in Tarrant County

Type	Destination	Est. Time	Est. Fare	Restrictions	Pre-Book R'Qrd?
All	Arlington	1 HR	\$20	PRIVATE PAY	24 HRS
All	Fort Worth	1 HR	\$20	PRIVATE PAY	24 HRS
Medical	Fort Worth Hospital District	1 HR	0	MEDICAID	24 HRS
Medical	Ft Worth Veterans Clinic	1 HR	0	VETRAN	24 HRS



[home](#) | [transit options](#) | [route maps](#) | [current events](#)
[shuttles](#) | [special services](#) | [about us](#) | [contact us](#)

Figure 4. Trip Options between Two Counties, bus-stop.org.

OREGON DEPARTMENT OF TRANSPORTATION (ODOT)

The state of Oregon has a public transportation system that includes more than 200 transit providers—from small demand responsive systems to Amtrak. The state recently developed a statewide transit trip-planning system to support closer operational ties and to provide enhanced information to their customers. The project produced three reports, the third of which provides specific information to ODOT on system recommendations, including functional elements, potential implementation phases, and cost estimates.

ODOT's objectives for a statewide transit information system include increased efficiencies among individual transit providers as a result of each provider examining how its service connects to and complements the services of adjoining providers; improved transit information for riders; leveraging resources and investments by reducing duplicate efforts in transit information systems by separate agencies; and raising the level of transit customer satisfaction by providing more information and by providing it more quickly.

ODOT uses a phased approach to build its transit information system, with each phase building on the information and infrastructure of the previous phase (9). The first phase is a web-based clearinghouse of transit information that will allow the user to find transit, paratransit, taxi, and rideshare options within a city or county. The clearinghouse also permits a user to find an intercity carrier that links two regions of the state. Elements proposed for this phase include the following:

- map-based interfaces to select a region or regions of travel;
- a database containing listings, contact information, website links, service area boundaries, and route and schedule information for each transit provider in the state, categorized by region;
- interactive GIS maps; and
- maps and information on bike trails, landmarks, and activity centers.

The clearinghouse developed in the first phase will be an enhancement of ODOT's searchable transit directory on the "TripCheck" travel advisory website (10).

The second phase will incorporate automated transit trip planning, with software that will generate a trip itinerary based on user inputs of trip origin, trip destination, and other parameters. Dynamic mapping support is one element of the trip-planning function, to provide walking and transfer directions between segments of the transit trip. Other features planned for this phase include a variety of user interfaces including the web interface, an interface for use by call-center operators, integrated voice response (IVR), and interfaces for personal digital assistants (PDAs) or Wireless Web.

The third phase includes automated reservations for demand-response transit services, integration of real-time traffic and other travel information, and on-line fare/ticket purchase.

Attachment B

Examples of Performance Measurement Approaches

Establishing and monitoring performance of coordinated services is very important to be able to demonstrate the benefits of coordination. Two resources follow.

The first resource, an excerpt from *“Improving Public Transportation Services through Effective Statewide Coordination”* from the National Governor’s Association Center for Best Practices (2002) presents a continuum of performance measures that can be applied. The second resource uses performance measure tied to specific goals and objectives to measure benefit. This resource is from *“United we Ride” Logic Model and Measures* (2007).

Addendum: Measuring Performance in Statewide Transportation Coordination Efforts

As described in this report, transportation coordination can yield numerous benefits. The challenge remains to measure coordination initiatives in a way that illustrates the benefits achieved while allowing for continuous improvement and accountability.

This addendum describes some key issues in establishing a performance measurement system for transportation coordination. It presents the logic of measuring performance, basic and advanced performance measures, and case studies of how several states are building performance measurement systems to capture better information on transportation coordination. Guidelines for statewide performance measurement are also outlined.

WHAT NGA DID

In order to understand the current practices of transportation coordination performance measurement, the NGA Center for Best Practices took the following steps:

- ❖ Convened a group of high-level state transportation coordination officials at the CTAAs annual conference in Austin, Texas, in May 2002;
- ❖ Reviewed the literature on performance measurement published by states, federal agencies and nonprofit organizations; and
- ❖ Conducted interviews with transportation coordination leaders in 10 states to gain an in-depth view of how performance is measured.

A Performance Management Framework for Transportation Coordination

Performance measurement is a tool for accountability that provides a means of judging policies and programs by measuring their outcomes or results against agreed-upon standards. A performance measurement system organizes information about processes and outcomes so that it can be used effectively by political leaders and program managers.¹

The ideal performance measurement system includes measures of *program* effectiveness and measures of *policy* effectiveness. **Measures of program effectiveness** provide information about how well individual programs perform. These measures may include cost effectiveness, cost efficiency, service effectiveness and sometimes quality of service. Program measures do not answer questions of whether human services transportation is working in a coordinated fashion.

Measures of policy effectiveness focus on whether transportation coordination achieves the state's broader goals and objectives. These goals include eliminating duplicate services, using transportation capacity fully and improving quality of life. Measuring these outcomes requires the use of data that capture the success of the system in operating as a single enterprise rather than as a collection of programs.

States are working to shape their systems toward robust measures of policy accountability, since these measures shed light on how well the state can work together as an enterprise to achieve policy goals. The following section outlines performance measures that can be used to develop this system.

Basic Measures of Program Effectiveness

Of the states measuring the performance of their transportation coordination initiatives—**Kentucky, Massachusetts, Michigan, New Jersey, Ohio and Oregon**—the four most common groups of data being collected are:

1. *Cost efficiency* data can be used to measure the relationship between resource inputs and service outputs.² Ideally, coordination will improve the ratios of cost efficiency. Measures in this area include:
 - ❖ Total operating cost per hour that vehicles are in service;
 - ❖ Total operating cost per mile that vehicles are in service;
 - ❖ Costs of paying drivers per hour that vehicles are in service;
 - ❖ Ratios of the hours vehicles are in service to the hours that drivers are paid;
 - ❖ Maintenance cost per hour that vehicles are in service;
 - ❖ Administrative cost per hour that vehicles are in service;
 - ❖ Average cost per hour that vehicles are in service; and
 - ❖ Labor cost per hour that vehicles are in service.
2. *Cost effectiveness* data can be used to measure the relationship between consumption of public transportation services and the resources expended.³ The fewer resources expended in relation to the service consumed, or the greater the consumption revenue received in relation to dollars spent, the more cost effective the service.

Measures of cost effectiveness include:

- ❖ Total cost of operating the service per passenger;
 - ❖ Passenger revenue as a percent of total operating cost; and
 - ❖ Passengers served for each dollar of operating costs.
3. *Service effectiveness* data can be used to measure the consumption of public transportation service in relation to the amount of service available.⁴ Data in this category go beyond basic transit measures and look at measures such as the number of shared trips provided or the percentage of vehicle capacity used. These begin to shed light on whether coordination actually is occurring. Other reliable measures of service effectiveness include:

MANDATING PERFORMANCE MEASURE

In **Ohio**, the state-run coordination program mandates that communities collect performance data and demonstrate improvements in coordination in order to get continued state funding.*

The law mandating coordinated special-needs transportation in **Washington State** calls for performance goals and an evaluation process that leads to continuous system improvement.†

Oregon also has recognized the role that performance monitoring plays in determining whether the intended results of transportation coordination are being achieved.§ However, a set of performance measures has yet to be agreed upon.

* Ohio Coordination Program: Criteria and Application Instructions” (Columbus, OH: Ohio Department of Transportation), 5.

† Coordinating Special Needs Transportation (Chapter 47.06B RCW),” Washington State law available online at: www.wsdot.wa.gov/acct/library/1999legislation.htm.

§ Mark Steranka and David Raphael, “The Coordination Challenge” (Salem, OR: Oregon Department of Transportation, November 2000), 19.

- ❖ Passengers served per hour that vehicles are in service;
- ❖ Passengers served per mile that vehicles are in service;
- ❖ Passenger revenue per hour that vehicles are in service;
- ❖ Passenger revenue per mile of vehicle service;
- ❖ Average passenger trips per month; and
- ❖ Average passengers per hour of vehicle operation.

4. *Service quality* data are frequently collected through ridership surveys that ask clients about such things as on-time service, the safety and appearance of drivers, and the ease of scheduling ride appointments. Most of these are only applicable in demand-based systems and are much harder to measure in the case of fixed-route transit services such as buses and rail.

Advanced Measures of Policy Effectiveness

A few states, most notably **Massachusetts** and **Ohio**, have gone a step further by using higher-level performance measurement that captures both program and policy effectiveness. These higher-level measures illustrate progress toward the core of transportation coordination *policy* goals. They show how transportation coordination as a policy is functioning to achieve community-wide outcomes at a given level of program efficiency and effectiveness.

States, via key policy staff and program managers, can develop higher-level performance measures by asking questions such as:

- ❖ Is quality of life improving for human services clients?
- ❖ Are more seniors and/or disabled residents living independently as a result of greater access to transportation?
- ❖ Are fewer transportation-dependent residents missing medical appointments?
- ❖ Are coordinated transportation systems providing greater access to jobs, leading to an increase in residents with earned income and a decrease in those relying on public assistance?

State Examples of Higher-Level Performance Measurement Systems

Ohio uses performance measures to determine both the success of coordination and of agencies implementing coordination at the county and regional levels. The Ohio Coordination Program provides grants of up to \$75,000 to counties and regional transit authorities to coordinate transportation delivery. The program goals are to improve and/or expand transportation services in a given area, and/or eliminate duplication of transportation resources. First-year applicants are required to provide baseline data with their funding requests. Required data include: number of individuals served, passenger trips, vehicle miles, vehicle hours, operating costs and other transportation-related expenses for each agency in the service area that either provides or purchases transportation services.

Applicants also must explain what resources are to be shared among the participating local agencies. Applicants must present coordination milestones and a timetable for achieving their goals. Grantees seeking second- and third-year funding must demonstrate progress toward meeting their milestones, such as measurable increases in the number of project participants and the number of coordinated complemen-

tary services. Demonstrated success, based on the performance measures outlined by the state, weighs heavily for determining continued funding to the grantees.

In July 2002, the **Massachusetts** Human Service Transportation Coordination Initiative installed an advanced set of performance measurement data points. Prior to that time, the state only knew how much money it was spending to coordinate human services transportation. Given the fiscal imperative for states to get the most for their money, the coordination oversight office developed a 12-point performance measurement matrix that the 9 regional transportation brokers must report on monthly (this matrix appears in Appendix II). The measures go beyond the basic program measures and ask providers for data such as: the number of shared and non-shared trips provided, the cost for providing shared and non-shared trips, the number of transportation providers used for trips, and the number of no-shows and canceled trips. The state expects these data will provide a much more thorough measure of their coordination success.

Sustained data collection and analysis are planned to yield long-term systemic improvements. For example, concurrent increases in expenses and no-shows/cancellations could illustrate the cost impact that no-shows and cancellations have on the transportation provider. Once that is understood, the state could step back and consider services and approaches to reduce no-shows and cancellations. In addition, measuring the number and cost of shared trips (those with more than one rider) may indicate whether multiple agencies are effectively coordinating services for maximum efficiency.

Examples of higher-level performance measurement also are evident in communities that receive federal transportation funding for job access transportation coordination. A U.S. General Accounting Office study found that the grantees went beyond simply collecting data on the number of job sites served and were reporting a variety of higher-level measures including:⁵

- ❖ Number of employers made available to low-income people through a job access service;
- ❖ Number of jobs served by job access transportation service; and
- ❖ Number of Temporary Assistance for Needy Families (TANF) clients who were able to obtain and keep employment as a result of job access service.

Once enough high-level performance measurement data have accumulated, state policymakers and program managers can spot trends that will lead to a complete evaluation of the system and ultimately conclude whether the program or policy is succeeding. Further, performance measures can focus attention on the relationship between program operations and outcomes.⁶

Guidelines in Establishing Effective Performance Measurement Systems

Governors should consider following four performance measurement guidelines in their statewide transportation coordination efforts.

1. At a minimum, Governors should direct state agencies involved in transportation coordination to implement a performance measurement system.

Governors are the only actors with responsibility for the various program areas participating in coordination, and therefore must ensure accountability in transportation coordination efforts. As described above, meaningful performance measurement systems can track progress toward policy and program goals as well as provide an instrument for making continuous improvements.

States involved in transportation coordination are at different stages of mandating the collection and analysis of performance measures. Some states interviewed for this report have not established performance measures. Those states that do require performance measures differ in the level of complexity of that data, even to the point that few truly are measuring the added value that transportation coordination can bring to the state human services mission.

2. Performance measurement should be linked to transportation coordination goals.

The most commonly identified goals of state transportation coordination initiatives are:

- ❖ Cost savings;
- ❖ Expansion of services;
- ❖ Greater operational efficiency; and
- ❖ Elimination of duplication.

Measures that focus on only a single program—and less comprehensive measures in general—fall short of giving policymakers the information they need to make informed decisions about transportation coordination. Basic transit measures such as rider counts and measures of cost efficiency fail to provide a complete understanding of performance. Most states have established a foundation for higher-level performance measurement by looking at basic transit measures. The next step for these states is to move up to a higher performance measurement level.

Once a statewide reporting system is in place, states can define new measures—as **Massachusetts** has done—to identify progress towards coordination goals. For example, Massachusetts has incorporated measurement of how many trips are shared by multiple passengers. Without basic cost data in place, this higher-level measure would be meaningless. Similarly, measuring service expansion without basic data in place would neglect the cost dimension. Measures, such as sharing of trips among agency clients, total operating costs at a given level of service, and total services provided at a given cost can be added to a program performance measurement system.

3. States should standardize regional providers' reporting requirements to enable consistent, regular measurement of performance and improvement.

States should develop and adhere to a standard set of data points upon which coordination partners from around the state must report. The data points must be able to be collected and reported consistently

across regions. States should require regular reporting of data, such as monthly or quarterly reports. Among the states interviewed for this report, such reporting is evident in **Kentucky, Massachusetts, Michigan, New Jersey, Ohio and Oregon.**

Data should be reported to a single state entity, wherever the state determines the performance measure aspect is best housed. That state office would “own” the data and be responsible for collecting it and reporting its analyses of the data to the governor; the legislature; and the cross-agency, state-level transportation coordination council (established as a policy and program discussion group for state departments involved). State-level analyses will provide an overall assessment and yield trends that should lead to further research on why some regions succeed while others struggle, particularly if the first task of the state office is standardization of regional data to establish a reliable baseline.⁷

4. Establish Consensus among Participating Agencies on Performance Measurement Guidelines.

By definition, transportation coordination entails bringing many interests to the table. At the state level, this usually means representatives of the departments of transportation, health and human services, labor, and education. Gubernatorial policy staff and legislators also are interested third parties. Although different partners have different priorities, agreement must be reached on performance measurement guidelines.

Several states, including **Massachusetts, North Carolina, Ohio and Washington,** have established cross-agency councils or task forces to provide guidance for the state-run transportation coordination effort. In some cases, this has led to the creation of performance measures. In other cases, the mechanism for doing so is in place for when the state decides to move forward with performance measurement.

Conclusion

Governors can ensure improvement in state transportation coordination efforts and pave the way for future enterprisewide government initiatives by improving policy accountability through state-of-the-art performance measurement. While implementation of such a system is neither instantaneous nor easy, the current era of budgetary challenges necessitates action in this direction for improved government performance and efficiency.

Moving to a higher level of performance measurement requires interagency consensus, standard data reporting, and significant coordination among regional and local actors, such as transportation brokers, human service agencies, and transit systems and providers. Hence, governors should designate administrative responsibility for measurement at the state level and provide the necessary authority to the designated individual or office, and they should ensure that the goal of systemwide measurement is pursued.

¹ Brizius and Campbell, 11.

² Ibid.

³ Ibid.

⁴ Ibid.

⁵ U.S. General Accounting Office, "Welfare Reform: Job Access Program Improves Local Service Coordination, but Evaluation Should be Completed" (GAO-03-204) (Washington, D.C.: U.S. General Accounting Office, December 2002), 10.

⁶ Brizius and Campbell, 25.

⁷ "Human Services Transportation Coordination: Determining Before and After Costs" (Transportation Coordination Brief No. 7) (Columbus, Ohio: Ohio Statewide Transportation Coordination Task Force, August 1998).

⁸ "Ohio Coordination Program: Criteria and Application Instructions" (Columbus, Ohio: Ohio Department of Transportation), 9.

⁹ Karen Horsch, "Indicators: Definition and Use in a Results-Based Accountability System" (Harvard Family Research Project) available online at www.gse.harvard.edu/~hfrp/pubs/onlinepubs/indicators.html.

Addendum Appendix A: Selected State Program Summaries

Summary of Transportation Coordination Efforts	Performance Measures and Program Contacts
<p>KENTUCKY</p> <p>The Human Service Transportation Delivery (HSTD) program primarily provides non-emergency medical transportation services to eligible Medicaid recipients. To a lesser extent, it transports persons in the TANF program to job interviews, job training, employment and child-care facilities. The program also provides services to persons eligible for programs through the state Department for the Blind & Vocational Rehabilitation. The Office of Transportation Delivery, within the Kentucky Transportation Cabinet, oversees the HSTD program.</p>	<p>The state computes cost-per-trip rates based on ridership and expense data reported monthly by transportation brokers. Cost-per-mile rates are not measured because of the largely rural composition of the state. Riders also are surveyed to determine customer satisfaction with the service.</p> <p>Marc Clark Executive Director Office of Quality Kentucky Transportation Cabinet 502/564-4072 marc.clark@mail.state.ky.us</p> <p>Kentucky Office of Transportation Delivery HSTD Branch http://www.kytc.state.ky.us/empower/otd/</p> <p>Enabling Legislation for HSTD Program www.lrc.state.ky.us/kar/603/007/080.htm</p>

<p>MASSACHUSETTS</p> <p>The Massachusetts Human Service Transportation (HST) Coordination Initiative serves human and elder service agency consumers who participate in state-funded programs such as MassHealth (i.e., Medicaid), Early Intervention, and community-based residential and social services. In addition, state agencies help with transportation for eligible consumers returning to work and for access to child care. The initiative is overseen by the Human Service Transportation Office, which is under the Executive Office of Health & Human Services and is staffed with transportation managers from the major participating agencies, including the state departments of mental health, mental retardation, public health and transitional assistance.</p>	<p>In July 2002, the state implemented a 12-point performance measurement report that looks at a range of ridership, cost and transportation data. Among the data points are: customers served, shared trips, non-shared trips, cost of shared and non-shared trips, and providers used. This new system standardizes the reporting requirements for the nine transportation brokers statewide. The new system is proposed to better monitor resource utilization and give a truer picture of coordination success.</p> <p>Catherine Mick Director Human Service Transportation Office 617/626-5151 catherine.mick@state.ma.us</p> <p>HST Coordination Initiative http://www.masscares.org/transportation/</p> <p>Operational Framework for HST Initiative http://www.masscares.org/transportation/framework.pdf</p>
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Summary of Transportation Coordination Efforts

Performance Measures and Program Contacts

MICHIGAN

Michigan operates two programs involving coordinated transportation. Under Project Zero, the state’s welfare-to-work initiative, transportation is provided for access to jobs, job training and child-care. Funding is provided by the Michigan Department of Transportation (MDOT), Family Independence Agency and Department of Career Development. The Specialized Service Program serves the elderly and disabled. MDOT makes grants to public transit agencies or other transportation providers to serve these residents. Grantees must establish local coordination committees to determine how best to meet their needs.

For Project Zero, local transportation providers report costs, revenues, passengers served, and hours and miles of service provided. Beginning in 2003, MDOT only is asking Specialized Service Program grantees for non-financial data, such as passengers served and miles and hours of service provided. Previously for the program, MDOT asked for financial information but has since stopped because the data were not being used for comparative purposes or to determine program performance. The latest MDOT long-range plan urges the development of a performance measurement system for programs throughout the department. It is thought that performance measures will not be incorporated into the transportation coordination programs, whose total state funding is \$8 million, until they are applied to larger state transportation initiatives.

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http://www.michigan.gov/mdot/0,1607,7-151-9623_10693_15160-32754--,00.html

NEW JERSEY

Transportation coordination is overseen by partnership of the New Jersey Departments of Transportation, Human Services and Labor, Transit, and the New Jersey State Employment & Training Commission. Each of the state’s 21 counties established an interagency transportation steering committee to identify local strategies for meeting transportation needs for this population. The process brought together human services, transportation, planning, and employment services agencies; as well as nonprofit organizations and other community stakeholders. Local

(continued)

Reliable data have been difficult to produce since the majority of the target population served use existing fixed-route bus service to get to and from jobs and job training. No tool has been developed to identify those people who use the existing service for this express purpose. Such data can only be gathered in small and rural areas where nonprofit agencies and private transit operators run demand-based services. In cases where specific jobs-access transportation routes have been established, the state has just begun asking for New Jersey Transit—the primary transit provider in the state—to report ridership numbers. The Department of Human Services is developing a monthly form for transit

(continued)

Summary of Transportation Coordination Efforts

Performance Measures and Program Contacts

strategies developed include: expansions of existing transit service, expansions of paratransit service, implementation of feeder services that connect rural and suburban areas to existing transit service, and establishment of transportation brokerages.

providers to report ridership and cost data for clients served who are TANF-eligible or whose TANF eligibility recently expired.

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DEX.HTM](http://www.state.nj.us/transportation/workforce/INDEX.HTM)

NORTH CAROLINA

The Human Service Transportation Council oversees statewide coordination. Its goal is to determine how much funding from federal, state, and other sources support human services transportation and then develop approaches that would blend funds to efficiently serve the largest number of residents. An April 2002 executive order from Governor Michael Easley directed state agencies that provide transportation to coordinate their efforts. The North Carolina Department of Transportation administers the Human Service Transportation Grant Program, which pays up to 75 percent (not exceeding \$18,750 annually) of the salary of a transportation coordinator for a county’s lead transportation agency. The coordinator is charged with planning how best to merge the different transportation resources with the various human services client needs.

At this stage, there are no performance measures in place.

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Public Transportation Division
North Carolina Department of Transportation
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Human Service Transportation Management Grant Program
[http://www.ncdot.org/transit/transitnet/PublicInfo/
TransitFinance/Grants/HSTM.html](http://www.ncdot.org/transit/transitnet/PublicInfo/TransitFinance/Grants/HSTM.html)

Summary of Transportation Coordination Efforts	Performance Measures and Program Contacts
<p>OHIO</p> <p>The Ohio Coordination Program awards grants to municipalities and regional transit authorities to coordinate human services transportation. Grantees can receive up to \$75,000 a year for three years to provide coordinated transportation. Funding preference is given to areas without public transportation systems in place.</p>	<p>Program guidelines require grant applicants to explain what resources are proposed to be shared among participating local agencies. Applicants must present coordination milestones and a timetable for achieving their goals. Grantees seeking second- and third-year funding must demonstrate progress toward their milestones, such as measurable increases in the number of project participants and the number of complementary, coordinated services.</p> <p>Lynn Rathke Rural Transit Assistant Program Coordinator Office of Transit Ohio Department of Transportation 614/644-7362 lynn.rathke@dot.state.oh.us</p> <p>Ohio Coordination Program http://www.dot.state.oh.us/ptrans/Funding_Programs/trans_coord.htm</p>

<p>OREGON</p> <p>The Oregon State Agency Transportation Coordination Project involves eight state-level departments and the Governor's Office. Among its accomplishments is the establishment of brokerages providing non-emergency medical transportation for Medicaid patients.</p>	<p>A June 2000 Oregon Department of Transportation report recommended developing a performance monitoring and tracing system to assess the effectiveness of agencies in implementing the transportation coordination directives, and in achieving desired outcomes. Parameters are still being developed.</p> <p>Jean Palmateer Public Transit Division Oregon Department of Transportation 503/986-3472 jean.m.palmateer@odot.state.or.us</p> <p>Oregon Transportation Coordination Initiative http://www.odot.state.or.us/pubtrans/coordination.html</p>
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Summary of Transportation Coordination Efforts	Performance Measures and Program Contacts
<p>RHODE ISLAND</p> <p>The Rhode Island Public Transit Authority (RIPTA), a quasi-state agency, has a state mandate to oversee transportation coordination. The authority plans how best to serve the paratransit and job access client base, provides most of the transportation services directly and brokers the rest of the services to other providers.</p>	<p>RIPTA collects and reports standard transit data, but has not yet developed a performance measurement system to illustrate the progress of the ongoing transportation coordination effort.</p> <p>Mark Therrien Assistant General Manager Transit System Development/Planning/Grants Rhode Island Public Transit Authority 401/784-9500, ext. 152 mtherrien@ripta.com</p> <p>Rhode Island Public Transit Authority www.ripta.com</p>
<p>WASHINGTON</p> <p>The Washington State Agency Council on Coordinated Transportation (ACCT) oversees the state initiative. Coordination is managed locally with the state acting as a facilitator. The program primarily serves the disabled, low-income, and elderly populations.</p>	<p>The 1999 law establishing the state-level council mandated the development of performance goals and an evaluation process that leads to continuous improvement of the system. To date, a performance measurement system has not been implemented.</p> <p>Jeanne Ward Administrator Washington State ACCT 360/705-7917 wardje@wsdot.wa.gov</p> <p>Washington State ACCT http://www.wsdot.wa.gov/acct/default.htm</p>

Addendum Appendix B: Massachusetts Performance Measurement Matrix: Human Services Transportation Brokers

<i>HST</i>	Consumers	One-way trips			Revenue/Expenditure (month of service not date of receipt or date paid out)				Other	Rev/ data			
<i>01</i>	<i>A</i>	<i>B</i>	<i>C</i>	<i>D</i>	<i>E</i>	<i>F</i>	<i>G</i>	<i>H</i>	<i>I</i>	<i>J</i>	<i>K</i>	<i>L</i>	
<i>DMR</i>	Total consumers added	Active consumers	Consumer shared	Consumer non-shared	Monitor	Consumer shared trip expenditures	Consumer non-shared trip expenditures	Monitor trip expenditures	Revenue direct services	Revenue mgt. Fee	Number providers used	No-show & cancelled trips	yes no *
Jul-02	●	●	●	●	●	●	●	●	●	●	●	●	●
Aug-02	●	●	●	●	●	●	●	●	●	●	●	●	●
Sep-02	●	●	●	●	●	●	●	●	●	●	●	●	●
Oct-02	●	●	●	●	●	●	●	●	●	●	●	●	●
Jun-03	●	●	●	●	●	●	●	●	●	●	●	●	●

A Represents the number of new consumers added and provided at least one trip for the month

B Represents the number of consumers receiving service during the month — column A would be included in this number (count only if a consumer took at least 1 trip)

C Represents the number of shared consumer trips for the month (shared trip is a trip with more than one authorized consumer on board the vehicle, ● That is, 5 consumers on the vehicle = 5 shared trips; 3 consumers = 3 shared trips, etc.

D Represents the number of non-shared consumer trips for the month (1 consumer in the vehicle) — if there is more than 1 consumer in the vehicle that would be recorded under shared trips (column C)
{The sum of columns C & D should equal total consumer trips for the month}

E Represents the number of monitor trips for the month

F Represents the expenditures to providers for shared trips

G Represents the expenditures to providers for non-shared trips

H Represents the expenditures to providers for monitor trips
{The sum of columns F, G & H should equal total expenditures to providers for the month}

I Represents the revenue received from the agency for direct services only

J Represents the revenue received from the agency for approved management costs only (ready or recurring payment)

K Represents the number of providers used that month to transport agency consumers

L Represents the number of no-show and canceled trips for the month (trips scheduled and not used for either reason)

Rev/data Indicate yes or no if the data submitted include a revision of a previous month's data (if yes, indicate in the asterisk column which month is revised)



**United We Ride
Logic Model & Measures
January 2007**

Introduction

Leaders in communities and states across the country have greatly improved mobility for millions of people over the last several decades. The shift away from *providing rides* to *managing mobility* is driving the success of fully coordinated transportation systems. Successful strategies coordinate human service agencies that provide transportation with public and private transit providers and involve stakeholders, advocates and clients.

The attached *Logic Model* and *Measures* are designed as a technical assistance tool to help communities and states move their work forward (University of Wisconsin, 2005; W.K. Kellogg Foundation, 2004). This tool is designed to assist in the difficult work of coordinating systems and blending efforts across service delivery systems at the national, state, and community levels. These tools join the “*Framework for Action*” as a means of supporting local and state efforts.

The *Framework for Action* is a comprehensive evaluation and planning tool designed to help state and community leaders and agencies involved in human service transportation and transit services, along with their stakeholders, assess and plan for coordinated transportation systems. The *Framework for Action* was developed by an “expert panel” in 2003. It focuses on a series of core coordination elements (such as working together, needs assessment, putting customers first, funding adaptations, technology, and moving people efficiently) to help groups in states and communities of all sizes assess their needs and plan their coordination efforts. The *Framework for Action* is actually two tools: one for communities and another for states. It is available at www.unitedweride.gov

The Logic Model and Measures were also developed by an “expert panel” following input of myriad stakeholder and advocacy organizations. The expert panel is also finalizing a Matrix that is designed to take the *Framework for Action* to the next level by providing communities and states with tools to take concrete action and identify their progress along the way. These tools build on the same core elements as the *Framework* and assist in defining where a community or state is on the road to building a fully coordinated comprehensive transportation system. An overall logic model (shown below) is used to illustrate the work in building a coordinated system, and outlining the system changes and accomplishments that will occur along the way.

Logic Model

Logic models are a widely used tool for program planning and change management. Logic models are useful because they provide a representation of the theory of change behind a program or initiative. There are varied approaches to the use of logic models, and no single best approach. Nevertheless the key concepts of most logic models involve inputs, outputs, outcomes and arrows that show the relationships between the elements in the model.

For the purposes of consistency and continuity, the United We Ride Logic Model has adopted the following definitions (although they may differ slightly from other logic models used at the federal, state or community level).

Situation

The conditions, causes, circumstances, factors, laws, regulations, issues, etc. that need to change in order to achieve the desired result.

Inputs

Inputs are resources that an organization takes in and then processes to produce the desired result. Resources are the human, organizational, community and financial capital needed to accomplish the work. It is important to note that inputs will likely be affected by the assumptions and forces that influence organizations, stakeholders and others at the coordination table. Examples of related inputs for United We Ride include federal programs and funding, technology, and training.

Outputs

Outputs are activities, processes, events, tools, actions or technologies that are a deliberate part of implementing a program. Outputs are what are done with the resources, and they are intended to bring about the desired result. They are quantifiable strategies that may involve many types of tactics or work, often accounted for by their number. An example of an output would be the use of the *Framework for Action* to conduct a needs assessment and planning process. Outputs are frequently misunderstood to indicate success. However, if the outputs aren't directly associated with achieving benefit, they are not indicators of success. If outputs are accomplished, they should result in initial indicators of progress. It is important to note that outputs will also be affected by the assumptions and influences of organizations, stakeholders and others at the coordination table. Examples of United We Ride related outputs include action plans, transportation services, and pedestrian access.

Indicators

Indicators are initial markers of success toward achieving the desired result. Indicators should represent a positive impact on the knowledge, awareness, skills, attitudes, decisions, behaviors, etc. of the target population (such as consumers or policy makers) or on system components (such as staff skill or change in levels of leadership). They are a result of the outputs and lead to measurable short-term change in the community or state.

Indicators can be affected by a variety of external factors and influence, outside the control of those involved in the coordination effort (e.g. the resignation of a key leader). Examples of United We Ride indicators include number of partnerships, numbers of rides, and level of satisfaction with services.

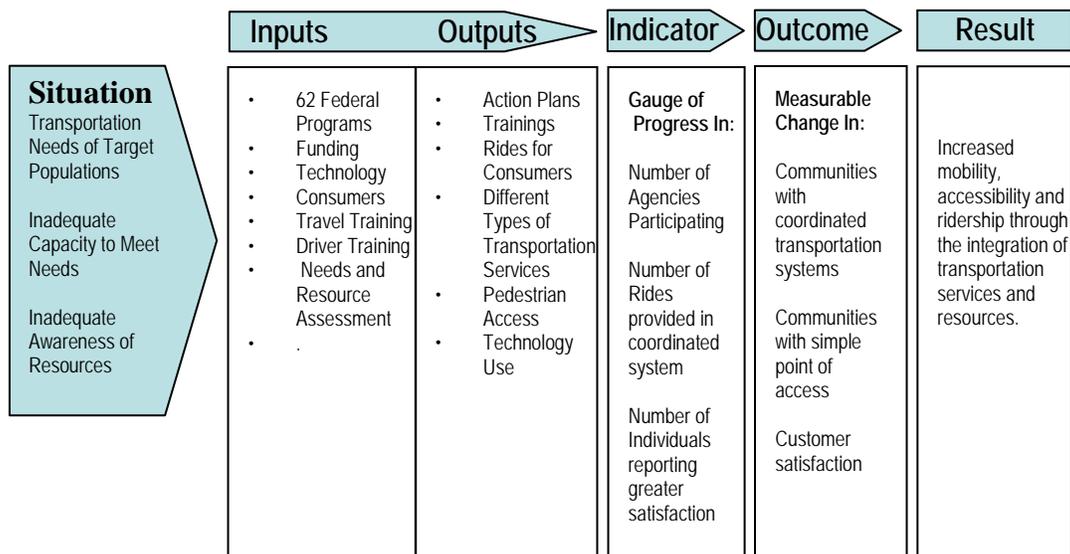
Outcomes

Outcomes are the positive changes in the community or state as a result of the indicators. Outcomes are the specific and measurable changes that will occur because of outputs and indicators. Changes may be in practice, policy, condition, action, service, operation, status, etc. Outcomes are a measurement of change in the short-term and should be designed to lead to long-term change (result). Most logic models measure short-term outcomes in a 4-6 year timeframe. Examples of United We Ride outcomes include communities with coordinated transportation systems or simplified point of access.

Result

The result is the intended longer-term, macro change that will occur in community and states systems because of the inputs, outputs, indicators and outcomes. Most logic models measure results in a 7-10 year timeframe. United We Ride related outcomes focus on increased mobility and accessibility.

**United We Ride
Logic Model**



UNITED WE RIDE
Cross Cutting Performance Measures

Overall Desired Impact Goal:

Greater ability to autonomously participate in all aspects of life through increased access to transportation services for people with disabilities, older adults, children and youth, and individuals with lower incomes.

The way communities will reach this long-term goal is to provide easier access to more rides with higher customer satisfaction in service quality for people with disabilities, older adults, children and youth, and individuals with lower incomes.

Definition/Description:

Access to transportation for people with disabilities, older adults, children and youth, and individuals with limited incomes is critical for their physical, social, economic and psychological well-being. Transportation helps individuals to more actively participate in work, school, health, play, and other community activities. The interface between transportation, housing, health, and employment is a critical aspect of community life. As an expression of public policy—transportation provides equal access to services and opportunities in order to participate in all aspects of life. Improved access to transportation will lead to a decreased dependence on government funded service and enable people to live independently, participate in the community, contribute to society, and have an overall enhanced quality of life. To achieve this goal, United We Ride has developed three measures, an efficiency measure, an effectiveness measure and a quality measure.

Three short term goals and commensurate outcomes measures support the longer term impact goal:

Goal 1: MORE RIDES FOR TARGET POPULATIONS FOR THE SAME OR FEWER ASSETS.

Measure 1: Increase the # of rides for the same or fewer assets for people with disabilities, older adults, children and youth, and individuals with lower incomes. (Efficiency outcome)

Definition:

PM 1: To increase the number of communities and states reporting the use of shared resources (e.g., staff, equipment, funding, etc) between different agencies and organizations so that they can provide more rides for more people with disabilities, older adults, children and youth, and individuals with lower incomes **.

Potential Related Indicators

1.1: Increase the number of individuals employed in a senior staff position to manage and coordinate all aspects of human service transportation for people with disabilities, older adults, children and youth, and individuals with lower incomes between multiple agencies and organizations.

1.2: Increase the number of agencies and funding sources by community or state participating in a coordinated human service transportation system.

1.3: To increase the number of coordinated human service transportation plans that are developed and implemented between multiple agencies at the state and local levels. (The indicator at the local level is the development and implementation of the plan; the potential national measure is the increase in the numbers of such plans).

1.4: To increase the number of rides for persons who are older, people with disabilities and individuals with limited incomes.

**Note: Communities and/or States implementing measures should consider collecting baseline data as appropriate. Selected measures may be included in studies conducted at the national level.

Goal 2 – SIMPLIFY ACCESS

Measure 2: Increase the # of communities with easier access to transportation services for people with disabilities, older adults, children and youth, and individuals with lower incomes. (Effectiveness outcome)

Definition:

PM 2: To increase the number of communities (e.g., urban, rural, other) which have a simplified point of access*-coordinated human service transportation system for people with disabilities, older adults, children and youth, and individuals with lower incomes so that they can have easier access to transportation services**.

Potential Related Indicators

2.1: Increase the number of agencies, service providers and funding sources participating in a simplified point of access* to transportation services for consumers.

2.2: Increase the types of modes (e.g., bus, paratransit, taxi, volunteer, etc) included in a simple point of entry system implemented at the local level.

2.3: Increase the numbers of individuals with disabilities, older adults, children and youth, and persons with limited incomes accessing transportation services within a simplified point of entry -coordinated human service system.

* Note: Simplified point of access is defined as an easy and single entry point for consumers who are accessing transportation services regardless of the target population, funding agency, transportation provider, or type of transportation service being provided.

**Note: Communities and/or States implementing measures should consider collecting baseline data as appropriate.

Goal 3: INCREASE CUSTOMER SATISFACTION

Measure 3: Increase the quality of transportation services for people with disabilities, older adults, children and youth, and individuals with lower incomes (Customer Satisfaction outcome)

Definition

PM3: To increase the level of customer satisfaction reported in areas related to the availability, the affordability, the acceptability, and the accessibility of transportation services for people with disabilities, older adults, children and youth, and individuals with lower incomes**.

Potential Related Indicators

3.1: Increase the % of people with disabilities, older adults, children and youth, and individuals with lower incomes who feel that transportation services are more available.

3.2: Increase the % of people with disabilities, older adults, children and youth, and individuals with lower incomes who feel that transportation services are more accessible.

3.3: Increase the % of people with disabilities, older adults, children and youth, and individuals with lower incomes who feel that transportation services are more affordable.

3.4: Increase the % of people with disabilities, older adults, children and youth, and individuals with lower incomes who feel that transportation services drivers are more courteous and helpful.

**Note: Communities and/or States implementing measures should consider collecting baseline data as appropriate.

Attachment C

Sample Joint Agreement

An example of a joint agreement follows. It comes from the document, “Coordination Primer: A Guide to Help Your Community Navigate Coordinated Transportation” Published by Interagency Coordinating Committee on Transportation, ICCT Clearinghouse, Rural Transit Assistance Center, Macomb, IL (2006)

Appendix 13 – Purchase of Service Agreement

This agreement made this _____ day of _____, between [Rides Mass Transit District] hereinafter referred to as PROVIDER, and _____, hereinafter referred to as RECIPIENT.

WHEREAS, it is the mutual concern of the parties hereto that the transportation services provided hereunder be of high professional quality.

NOW THEREFORE, the parties hereto agree as follows:

(1) This agreement shall become effective _____. Either party upon thirty (30) days written notice may terminate this agreement.

(2) Service eligible for delivery under this agreement would be the transporting of RECIPIENT'S consumers in _____ County from their designated homes to the _____ at _____ and [Any other service provided].

The PROVIDER will issue a numbered fare card to each of the RECIPIENT'S consumers. If applicable, a minimum of _____ units of service will be delivered under this AGREEMENT. [Additional service criteria here: miles, hours etc.]

(3) RECIPIENT will compensate PROVIDER for services described in the AGREEMENT at \$_____ per _____.

(4) The PROVIDER shall, for the period of this contract, carry and maintain in full force and effect, insurance in such company or companies while it is performing hereunder, in the following minimum types and amounts:

Type of Insurance	Amount
PERSONAL INJURY & PROPERTY	COMBINED SINGLE LIMIT
DAMAGE LIABILITY INSURANCE	\$1,000,000.00 PER OCCURANCE
WORKMEN'S COMPENSATION (For [RIDES] employees only)	Full Statutory Limits

(5) PROVIDER shall develop, maintain, and make information and reports available to RECIPIENT.

(6) RECIPIENT will notify dispatchers if for any reason the regular route cannot or should not be made. This will be done in time to notify drivers before they begin the day's route. The Director of _____ and the County Supervisor of [RIDES] will work directly together to handle overall operations of the AGREEMENT. Day to day

communications concerning changes in routes or consumers will be between the [RIDES] dispatchers and a designated RECIPIENT employee.

(7) PROVIDER'S employees will communicate accidents and incidents involving the RECIPIENT'S consumers in the following manner:

- Accidents should be reported by phone to the designated RECIPIENT employee as soon as prudently possible after the occurrence. The PROVIDER will provide copies of follow-up accident reporting to the RECIPIENT within (3) three business days after the completion of any investigation.
- Designated PROVIDER'S employees will provide the RECIPIENT with copies of written incident reporting regarding improper or unusual physical or verbal activity of its consumers during transport. This reporting would be provided as soon as possible after the completion of the scheduled route. Incidents of a serious nature requiring immediate action would be communicated by phone or in person immediately and followed by written report.

(8) Based on the costs presented under the AGREEMENT, RECIPIENT agrees to reimburse the PROVIDER for services rendered on a monthly basis. Payment will be due within 15 days of receipt of invoice.

(9) PROVIDER will operate as a subcontractor to the recipient and will meet all of the necessary requirements of the RECIPIENT'S sponsoring agency and/or grant requirements.

(10) Compensation under this contract is considered funding of last resort and is not intended to replace other State and Federal program obligations.

(11) The AGREEMENT and any addenda constitute the entire agreement between the PROVIDER and RECIPIENT. If any provision of the AGREEMENT is in conflict with the laws of the State of Illinois or the United States of America, said provision shall be considered invalid and the remaining provisions shall remain in force.

Executed this _____ day of _____ 20 _____.

APPROVED:

DATE

DATE

[RMTD] _____
DATE

Attachment D

Eligible Mobility Management Activities from FTA Circulars

Excerpts from FTA C.9050.1 Job Access and Reverse Commute (JARC) (May 1, 2007)

Chapter III General Program Information

11. ELIGIBLE ACTIVITIES. Funds from the JARC program are available for capital, planning, and operating expenses that support the development and maintenance of transportation services designed to transport low-income individuals to and from jobs and activities related to their employment and to support reverse commute projects. In the conference report accompanying SAFETEA-LU, the conferees stated an expectation that FTA would “continue its practice of providing maximum flexibility to job access projects that are designed to meet the needs of individuals who are not effectively served by public transportation, consistent with the use of funds described in the *Federal Register*, Volume 67 (April 8, 2002)” (H.R. Report 109–203, at Section 3018 (July 28, 2005)). Therefore, eligible projects may include, but are not limited to capital, planning, and operating assistance to support activities such as:

(sections a-q not reported here, not relevant to this discussion)

r. Supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management techniques may enhance transportation access for populations beyond those served by one agency or organization within a community. For example, a non-profit agency could receive JARC funding to support the administrative costs of sharing services it provides to its own clientele with other low-income individuals and coordinate usage of vehicles with other non-profits, but not the operating costs of the service. Mobility management is intended to build coordination among existing public transportation providers and other transportation service providers with the result of expanding the availability of service. Mobility management activities may include:

- (1) The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals;
- (2) Support for short term management activities to plan and implement coordinated services;
- (3) The support of State and local coordination policy bodies and councils;
- (4) The operation of transportation brokerages to coordinate providers, funding agencies and customers;
- (5) The provision of coordination services, including employer-oriented Transportation Management Organizations’ and Human Service Organizations’ customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;

-
- (6) The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
- (7) Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems (acquisition of technology is also eligible as a stand alone capital expense).

Excerpts from FTA C.9045.1 New Freedom Program (May 1, 2007)

Chapter III General Program Information

11. ELIGIBLE ACTIVITIES. New Freedom Program funds are available for capital and operating expenses that support new public transportation services beyond those required by the Americans with Disabilities Act of 1990 (ADA) and new public transportation alternatives beyond those required by the ADA designed to assist individuals with disabilities with accessing transportation services, including transportation to and from jobs and employment support services. For the purpose of the New Freedom Program, “new” service is any service or activity that was not operational on August 10, 2005, and did not have an identified funding source as of August 10, 2005, as evidenced by inclusion in the Transportation Improvement Plan (TIP) or the STIP. In other words, if not for the New Freedom Program, these projects would not have consideration for funding and proposed service enhancements would not be available for individuals with disabilities.

Maintenance of Effort: Recipients or subrecipients may not terminate ADA paratransit enhancements or other services funded as of August 10, 2005, in an effort to reintroduce the services as “new” and then receive New Freedom funds for those services.

Eligible projects funded with New Freedom funds may continue to be eligible for New Freedom funding indefinitely as long as the project(s) continue to be part of the coordinated plan.

Both new public transportation services and new public transportation alternatives are required to go beyond the requirements of the ADA and must (1) be targeted toward individuals with disabilities; and (2) meet the intent of the program by removing barriers to transportation and assisting persons with disabilities with transportation, including transportation to and from jobs and employment services.

The list of eligible activities is intended to be illustrative, not exhaustive. Recipients are encouraged to develop innovative solutions to meet the needs of individuals with disabilities in their communities.

(4) Supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management techniques may

enhance transportation access for populations beyond those served by one agency or organization within a community. For example, a non-profit agency could receive New Freedom funding to support the administrative costs of sharing services it provides to its own clientele with other individuals with disabilities and coordinate usage of vehicles with other non-profits, but not the operating costs of the service. Mobility management is intended to build coordination among existing public transportation providers and other transportation service providers with the result of expanding the availability of service. Mobility management activities may include:

- (a) The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals;
- (b) Support for short term management activities to plan and implement coordinated services;
- (c) The support of State and local coordination policy bodies and councils;
- (d) The operation of transportation brokerages to coordinate providers, funding agencies and customers;
- (e) The provision of coordination services, including employer-oriented Transportation Management Organizations' and Human Service Organizations' customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
- (f) The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
- (g) Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System Technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems (acquisition of technology is also eligible as a stand alone capital expense).

Attachment E

Sample Mobility Manager Job Descriptions

Source: <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=372&z=78> (July 7, 2010)

Sample
Mobility Manager – Job Description

Job Title: Manager of Human Services Transportation Coordination

Hiring Salary Range: \$60,000 yr

Job Summary: Human services transportation coordination aims to improve transportation services for persons with disabilities, older adults and individuals with lower incomes by ensuring that communities coordinate transportation resources through multiple federal programs. This position will be responsible for Mobility Management which, under the Federal Transit Administration (FTA) definition: "consists of short-range planning, management activities and projects for improving coordination among public transportation and other transportation service providers with the intent of expanding the availability of services."

This position is FTA funded and is contingent upon continued future grant funding. Eligible activities for this position shall be limited and shall meet all program requirements identified in FTA program circulars.

Duties:

Develops and annually updates a "Locally Developed, Coordinated Public Transit-Human Services Transportation Plan" which identifies the transportation needs of individuals with disabilities, older adults and individuals with lower incomes; provides strategies for meeting those local needs and prioritizes transportation services for funding and implementation.

Promotes the enhancement and facilitation of access to transportation services, including the integration and coordination of services.

Supports state and local coordination planning and policy bodies such as regional partnering agencies and funding partners. Promotes the FTA initiative on the development of coordinated family of services.

Supports operational planning for the acquisition and implementation of ITS technologies to help plan and operate coordinated systems.

Develops enhanced strategies to implement FTA's required competitive project selection process.

Gathers and analyzes data to evaluate intermodal transportation service options for persons with disabilities, the elderly and others who are transportation disadvantaged to design the most efficient and cost effective option possible.

Promotes "United We Ride" efforts including activities related to the Job Access

and Reverse Commute (JARC) Program, New Freedom Program (NFP), Elderly Individuals and Individuals with Disabilities programs.

Develops and maintains the Mobility Action Council, a pro-active stakeholder group and coordinates public involvement activities.

Develops and manages JARC and NFP projects and budgets.

Develops strategies for seeking other funding sources and to leverage existing funding with non-FTA federal programs.

Required Knowledge, Skills, and Abilities:

Knowledge of the Americans with Disabilities Act (ADA) and its specific applications to public transportation.

Knowledge of the updated JARC (Section 5316), NFP (Section 5317) and Elderly Individuals and Individuals with Disabilities (Section 5310) programs.

Knowledge of the Coordinating Council on Access and Mobility (CCAM), United We Ride (UWR), Mobility Services for All Americans (MSAA) and other federal coordination initiatives with federal programs.

Knowledge of federal programs providing transportation funding for the targeted population.

Knowledge of the principles, procedures and strategies of coordinated human services transit-transportation planning and coordination strategies.

Knowledge of Federal Transit Administration (FTA) and Georgia Department of Transportation (FDOT) policies, procedures and practices.

Proficiency with spreadsheet, word processing, presentation, database and project management software.

Excellent interpersonal, written and verbal communication skills.

Ability to provide leadership and speak before public groups.

Ability to work independently and with others in an effective manner.

Ability to use a personal computer and other modern office equipment.

Ability to analyze data, define problems, identify potential solutions, develop implementation strategies and evaluate outcome.

Ability to prepare clear and concise oral and written reports.

Ability to read and understand transportation and program planning documents and standards.

Ability to work a flexible schedule that may include evenings and weekends.

Ability to establish and maintain effective working relationships with all levels of staff, community leaders, government representatives, and customers.

Ability to operate a motor vehicle; must possess and maintain a valid Georgia Driver's License.

Physical Requirements:

Extended periods sitting at a table, desk or workstation with use of a computer; normal visual acuity and field of vision; hearing, speaking and color perception; work involves periodic bending, stooping, reaching, standing and walking; requires dexterity in operating office machines and equipment; periodic need to carry items for short distances weighing up to 10 lbs. Periodic fieldwork in varying environments. Travel as necessary within or outside of service area via automobile or other mode of transportation.

Required Education and Experience:

A Bachelor's Degree from an accredited college or university in Transportation/Urban Planning, Business/Public Administration or a related field and four (4) years of progressively responsible experience with a public transit system handling the day-to-day operations of service planning, accessible services, human services transportation coordination or a related field. Qualifying experience must include computer proficiency and at least two (2) years of experience at an independent decision-making level. An equivalent combination of related education, training and experience that demonstrates the knowledge, skills and ability to effectively perform the functions of this position may be considered. A Master's Degree in Transportation/Urban Planning, Business/Public Administration or a related may be substituted for one year of the required experience.

Job Title: Mobility Manager**Job Type:** Manager**Date Posted:** 12/18/2007**Organization:** Pikes Peak Area Agency on Aging**URL:** www.ppacg.org**Job Description:**

Mobility Manager

Pikes Peak Area Agency on Aging

Monthly Salary: \$3,730 - \$5,408

OPEN UNTIL FILLED

This is a temporary one-year exempt professional position with the Pikes Peak Area Council of Governments, and the Pikes Peak Area Agency on Aging. The position serves as the Mobility Manager for the PPAAA. As the Program Coordinator, this individual is responsible for developing a joint call and scheduling center under the guidance of the PPAAA Director, for participating in collaborations of community organizations that provide human services transportation in El Paso and Teller Counties and for identifying and procuring resources to implement the joint call and scheduling center.

Duties include, but are not limited to:

- Develop a coordination program for human services transportation by collaborating with community organizations that provide such services in El Paso and Teller Counties to:
 1. Research needs and demands of users
 2. Review regulatory processes
 3. Facilitate communication between agencies
 4. Develop incentives to encourage agency participation as needed
- Interface with PPACG's Coordination Committee on Specialized Transportation,
- Investigate the concept of a specialized transportation brokerage and determine what structure would be effective in the Pikes Peak region.
- Strengthen the network of human services transportation providers in El Paso and Teller Counties while maintaining and supporting the identity of each provider in order to provide increased mobility in the region.
 1. Establish a joint call and scheduling center
 2. Develop common and accurate reporting systems as needed
 3. Develop service goals for the transportation brokerage
 4. Identify and use fully allocated service costs in evaluating projects and service options
 5. Establish a system for the shared use of vehicles
 6. Investigate a system of shared resources including those related to vehicle maintenance, sharing of backup vehicles, and cost saving fueling options
- Establish provision of alternative services such as mileage reimbursements: volunteer drivers/vehicle sharing, mobility training, vouchers for gas or car repairs, in order to meet diverse human service transportation needs at the lowest cost.
- Develop systems to help providers improve the overall condition of their vehicle fleets so that they are safe, cost effective to maintain and meet passenger needs. Develop a system to provide adequate backup vehicles to provide reliable service.
- Develop and implement common standards of driver training to provide safe drivers who can be cross-trained for different services and clientele.
- Develop a simple and uniform system of eligibility for all services in the network.
- Develop customer information that explains the range of services and encourages rider responsibility for choosing the most appropriate and cost-effective option that will meet the customer's needs.
- Implement quality control standards that include service reliability and customer satisfaction.

Supervisor

The Director of the Pikes Peak Area Agency on Aging

Required Education and Experience

1. Master's Degree in public administration, transportation planning, or a related field, or
2. Bachelor's Degree in public administration, transportation planning, or a related field, plus a minimum of two years of progressively responsible experience, or

3. Associate's Degree in transportation planning, urban and regional planning, or a related field, plus a minimum of six years of progressively responsible experience, or
4. High school diploma plus a minimum of eight years of progressively responsible experience in managing or administering the provision of human services transportation with responsibility for the required duties listed above.

Also required:

- A high degree of computer literacy, including competency in standard spreadsheet, database and word processing software, and geographic information system software.
- A thorough knowledge of the principles and practices of urban transportation planning, technical analysis methods, and excellent written and oral communication skills.
- Ability to analyze complex issues and present results in concise reports and presentations to PPACG staff and others; interact effectively with members of the public, elected officials, Federal, State, and local agency representatives, PPACG Committees, and community organizations.
- Understanding of pertinent Federal and State regulations, and a working familiarity with the most recent Federal transportation legislation and Clean Air Act transportation planning requirements.

Please download and complete an application at www.ppacg.org, attach your resume, if desired, and email to: Margaret Shelton at: mshelton@ppacg.org. You may also fax to (719) 471-1226, or mail to 15 South 7th Street, Colorado Springs, Co 80905-1501.

PPACG is an equal opportunity employer.



Job Opening for Mobility Manager

The Transit Authority of River City is looking for a full time Mobility Manager within its Marketing and Planning Department. This person will implement tasks as determined by TARC and the Coordinated Transportation Steering Committee, which includes members of local non-profit and private transportation providers. The objective of this organization is to coordinate transportation services provided throughout the metropolitan area in order to improve overall mobility, with near-term improvements for elderly persons or persons with disabilities. This position provides the opportunity to interact with experienced professionals in a variety of fields. Prospective candidates with a background in non-profit organizations, transportation planning, communications or public relations should apply.

Duties include data collection and analysis; general clerical tasks; research and report generation; grant writing; outreach to businesses, non-profits and government agencies, and organizing and staffing community events, serving as project manager for grants obtained, and researching and testing potential ITS applications.

Applicant should be extremely detail oriented and enjoy a fast paced working environment and must be able to work independently. Daily travel is expected.

Essential Computer Skills:

Microsoft Office – Word, Excel, and Access (or other similar desktop programs)

Hours: 40 hours/week

Salary: negotiable

Where to apply: Send resume and salary history to Human Resources, Attention: Mobility Manager, 1000 W. Broadway; Louisville, KY 40203.

**TRANSIT AUTHORITY OF RIVER CITY
POSITION DESCRIPTION**

JOB TITLE: Mobility Manager

FLSA STATUS: Exempt

EEO CODE: 02

JOB GRADE:

JOB CODE:

REPORTS TO: Director of Marketing and Planning

GENERAL SUMMARY:

Under general supervision of Coordinated Transportation Steering Committee based on the organization's long term goals and objectives

ESSENTIAL DUTIES AND TASKS:

1. Develop coordination program for transportation providers
 - a. Develop incentive program
 - b. Create communication plan
 - c. Review regulatory processes
 - d. Research needs and demands of users
2. Develop transportation program
 - a. Explore use of local cab company and school system for service provision
 - b. Establish system for shared use vehicles
3. Develop information program
 - a. Create map of assets and needs
 - b. Produce outreach materials for users and providers
 - c. Develop grants and other funding sources
4. Explore and implement opportunities to generate additional resources
 - a. Research and apply for eligible grants
 - b. Pursue opportunities for corporate and government sponsorships
 - c. Seek government grants and other funds.
5. Perform other duties as assigned

WORKING CONDITIONS:

This work is generally performed in a quiet office environment. Some work may take place in the field, depending on the assignment. The incumbent will be exposed to diesel fumes and/or airborne particles.

EFFORT:

Long periods of time working at a computer terminal. Use of keyboard may be stressful to hands or wrists. Must be able to see, hear and speak. Frequent handling and fingering, reading,

working with information, standing, walking. Occasional lifting up to 25 pounds, reaching, climbing, stooping. Requires driving almost daily. Must be available for evening and weekend work.

MACHINES, TOOLS, EQUIPMENT:

Computer, printer, photocopy machine, fax machine, calculator, shredder, telephone, TARC van or car

MINIMUM QUALIFICATIONS:

Post secondary education in business, communications or related field preferred. A combination of education, training and experience that results in demonstrated competency performing the work may be substituted.

Excellent verbal and written communication skills. Ability to coordinate multiple projects simultaneously. Ability to create effective communication devices.

Must have excellent computer skills.

Must maintain a valid driver's license.

Successful performance on all pre-employment tests, including any required drug test.

The incumbent must be able to maintain the confidentiality of any information s/he encounters.

Reasonable accommodations may be made to those who are able to perform the essential duties of the job.

SPECIALIZED SKILLS AND KNOWLEDGE:

Experience with the following types of software and/or applications is preferred: word processing, spreadsheets, scheduling, project management, presentation, graphics, layout and design.

Approved:

Employee Date

Supervisor Date

Director of Human Resources Date

Executive Director Date

- **TARC reserves the right to revise this Position Description, as it deems necessary.**

Job Opening for Mobility Manager

Lee-Russell Council of Governments is seeking a Mobility Manager to oversee the coordinated transportation program by planning, coordinating, and implementing transportation for low income persons, the elderly, & persons with disabilities. Responsibilities include: meeting with users and providers of transportation and human service organizations; developing and maintaining a regional coordinated transportation plan; developing transportation resource materials; applying for and administering federal transportation grants; maintaining records; submitting reports; supporting regional public transit day to day operations and conducting community outreach.

Requirements: A Bachelor's Degree in Transportation Planning, Public Administration, Community Planning, or other related field with excellent communication and organization skills. Two years of job experience in public sector transportation, is preferred.

Salary Range: \$36,102 - \$54,154.

Send resume and references to: Suzanne Burnette, Executive Director, Lee-Russell Council of Governments, 2207 Gateway Drive, Opelika, AL 36801, 334-749-5264 or Suzanne.Burnette@adss.alabama.gov.

Position will remain open until filled.

Attachment F

Sample Fact Sheet: Spotlight on Transportation and Mobility Management for Northeast Westchester (NY)



Spotlight on Transportation and Mobility Management for Northeast Westchester

What: One phone number access to transportation information and reservations for public, private and volunteer transportation services. Coming: Vouchers for income-eligible riders.

Where: Starting in Northeast Westchester and spreading across upper Westchester.

For Whom: First -- older adults, people with disabilities, low income riders, and workers who don't drive (for example, home health aides) who are willing to travel to work in Northeast Westchester.

When:

- Summer, 2009 and ongoing – outreach to groups and organizations across upper Westchester willing to work collaboratively on transportation issues. Begin discussions about best practices in Mobility Management across the country and local preferences.
- Fall/winter, 2009-10 – volunteers collect and publish information online about existing public, private and volunteer transportation services in upper Westchester.
- Spring, 2010 – outreach to employers of workers without cars who are willing to travel to work in northeast Westchester from Peekskill, Brewster, Danbury and elsewhere.
- Spring/Summer, 2010 – expand access to driver education training for older drivers and expand sensitivity training for volunteer, public and private livery drivers.
- Summer/Fall, 2010 – select Mobility Management technology system to enable a small staff to handle requests/reservations and to administer vouchers for income-qualified riders.

Why: Older adults are leaving their homes and communities in northeast Westchester for a number of reasons. Taxes and the cost of living are two of them. But if older adults want to stay in their homes, lack of reliable and affordable mobility becomes the number one safety concern. Because homecare workers who don't drive cannot reach the rural corners of the county, lack of access to home health aide and personal care worker assistance is another large safety concern.

How: By bringing together groups and organizations to share information and preferences about mobility and to build sustainable, collaborative strategies to connect riders with rides.

With Support of: Livable Communities of Department of Senior Programs & Services, Westchester County Department of Transportation, Federal Transit Authority and many local organizations.