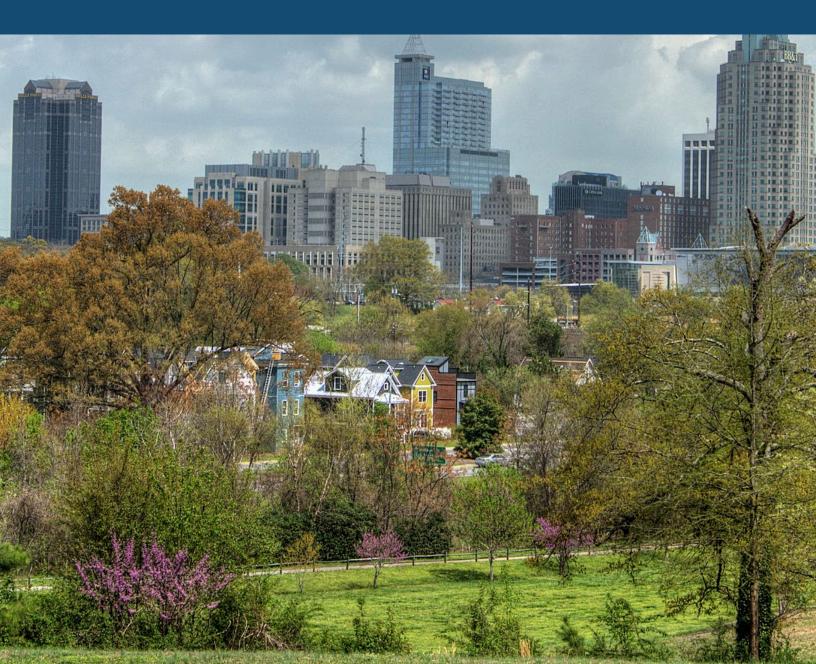


Mobility Management Implementation Study

Recommended Mobility Management Framework

December 2022 NELSON NYGAARD



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Executive Summary

This "White Paper" report presents a recommended framework for implementing a mobility management program in the Capital Area Metropolitan Planning Organization (CAMPO) region. This summary defines mobility management, describes the genesis of the region's program and implementation study that has been underway since the fall of 2021 and outlines recommendations for the regional mobility management program and next step of the study. Support is sought from program participants to advance the mobility management program into implementation starting July 1, 2023, the beginning of Fiscal Year 2024.

MOBILITY MANAGEMENT EXPLAINED

Mobility management describes programs and services that help people learn about and use transportation services. Mobility managers typically work with older adults, people with disabilities, and others who need transportation. Through outreach and engagement activities and through collaboration with transportation providers, other public agencies, and advocates and nonprofits, mobility managers work to improve access to transportation for those who need it most.

WHY MOBILITY MANAGEMENT IS NEEDED

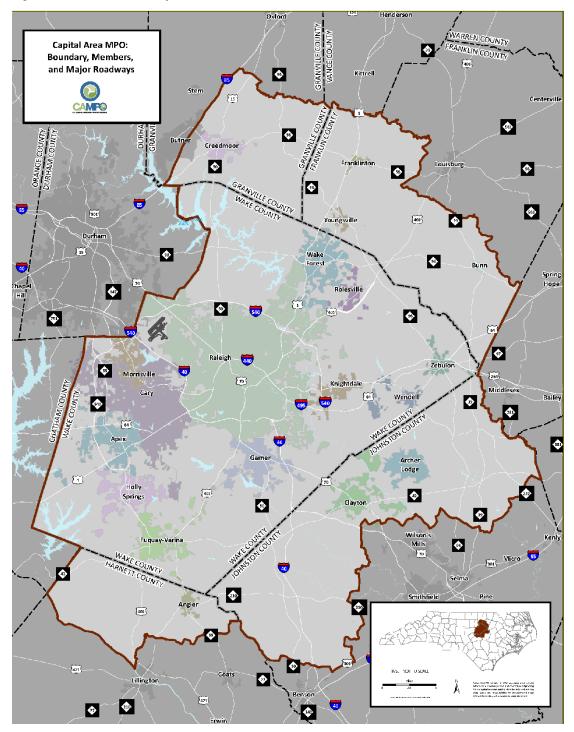
Public transportation options outside our region's fixed-route bus systems are limited and more coverage is needed. In the more rural parts of our region, it is difficult to sustain regularly scheduled bus service because the demand is comparatively low. At the same time, available reservation-based transportation services are not well known and the services available often have capacity limits. A mobility management program overseen by a mobility manager that features more outreach, consolidated information, and better coordination is expected to make a difference.

Origins of Mobility Management in the CAMPO Region

In 2019, the Wake County and Raleigh Urbanized Area, also known as the CAMPO Study Area (see Figure 1.) agencies adopted the 2018 Updated Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP); the plan was amended in 2020. The CPT-HSTP recommended as a key strategy implementation of a mobility management program with a primary focus on the rural areas of the region and in particular rural Wake County and Johnston County.

CAMPO and its transit agency partners jointly established a Mobility Coordination Committee (MCC) to advance recommendations from the CPT-HSTP, including mobility management. The MCC sought consultant support to undertake a Mobility Management Implementation Study (MMIS). CAMPO, with support from Wake County, the City of Raleigh, and the Town of Cary, engaged a team led by Nelson\Nygaard Consulting Associates to undertake the MMIS.

Figure 1 CAMPO MMIS Study Area



STUDY PROCESS

The recommended mobility framework described in this report results from a process that began in September 2021. The MMIS was guided by a Technical Steering Committee (TSC) and input from public agency staff and boards, stakeholders, and others. The program design has broad support, and a potential source of funding has been identified.

The two-phase study includes 12 tasks. This document summarizes the work completed in Phase I, including:

- Informational materials on mobility management (flyer and primer)
- Technical memorandum summarizing published plans, transit agency programs and needs, nonprofit agencies receiving transportation funding, and funding programs
- Stakeholder and public engagement strategy
- Technical memorandum summarizing mobility management practices in other regions and strategies applicable to the CAMPO region
- Recommended implementation framework & summary of potential transit service impacts and benefits
- Recommendations report (this document)

Phase II will further refine the implementation steps and include a plan for marketing and promoting mobility management.

COORDINATION AND ENGAGEMENT ACTIVITIES

Technical Steering Committee (TSC)

The MMIS has been guided by a Technical Steering Committee (TSC) composed of staff from sponsor organizations, other transportation providers, social service agencies and others. See Chapter 2. The TSC has met five times.

Board and Committee Presentations

Members of the study team met with or provided information to governing boards and committees from the following organizations:

- City of Raleigh (City Council, Transit Authority, Mayor's Committee for Persons with Disabilities)
- Wake County (GoWake Access Transportation Advisory Board (TAB)

Johnston County (Johnston County Area Transit System ((JCATS) – Transit Advisory Board)

- Town of Cary (Cary Transportation Working Group)
- Kerr Area Rural Transportation Authority ((KARTS) Executive Board/Transit Advisory Board)
- Wake Transit Policy Advisory Committee (TPAC))
- CAMPO (Executive Board and Technical Coordinating Committee (TCC))

Focus Groups

In the summer of 2022, the team arranged two virtual focus groups to seek input from providers/helpers and from riders. Meeting summaries for both focus groups are provided in Appendix B. The team used input from these meetings to refine the proposed program design.

RECOMMENDED MOBILITY MANAGEMENT PROGRAM

Chapter Four summarizes the recommended mobility management program (MMP) for the CAMPO region. It reflects input from the two focus groups and the TSC. This includes an MMP vision, description of program elements, goals and actions, and a phasing plan for implementation. It also includes a discussion of what the MMP means for the regions' public transportation providers.

Main Program Goals

Chapter Five presents specific implementation strategies to achieve the proposed MMP goals in the form of a table, which organizes the MMP implementation strategies within the three main program goals.

- 1. Through **engagement**, **outreach**, **and coordination**, offer consistent and easily accessible information on available public transportation services,
- 2. Through **data collection**, **needs assessment**, **and program design**, better address the concerns of people who face mobility challenges, and
- 3. Through **program evaluation and refinement**, promote and improve coordination and use of technology among providers leading to a better user experience, more transportation services, and reduced operating costs

Main Program Elements

Key implementation elements of the program are to:

- Create a new position of Regional Mobility Manager to oversee the program
- Hire the new mobility manager as a CAMPO employee with the understanding that they will rotate their time among the transportation providers' offices to gain an understanding of operations and to build relationships with agency staff
- Charge the region's Mobility Coordination Committee (MCC) with providing guidance and support to the mobility manager
- Fund the program with Federal Transit Administration (FTA) resources using the Raleigh Urbanized Area's annual allocation of the Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) program funds. The program funding is estimated to be \$250,000-\$300,000 for the first two years, including expenses.. The region has averaged approximately \$1.4 million for 5310 programming. The allocation of Section 5310 funds for this program can be absorbed by the regional funding.

Expected Benefits

The general expected benefits of the MMP are outlined in the program vision, which states:

Through a mobility management program (MMP) that grows and evolves over time, the CAMPO region will deliver **improved public transportation information and services for travel throughout the region, particularly in rural areas**. The MMP will **help riders better connect to and use public transportation services** (fixed route, traditional demand response, and ondemand, also known as microtransit). The MMP will **streamline the process of finding travel options in areas where fixed route services are not available**. Older adults, people with disabilities, and people with low incomes, and those who help them, advocate for them, or plan for their needs will benefit from vastly improved coordination. Eventually, **more trips will be shared among providers and accessible technology will improve the user experience**. The program will produce measurable benefits and its lessons will inform other future investments in improved transportation.

Expected Agency Obligations

The regional MMP will not alter how each participating transportation agency delivers transportation services or how it is funded. Additional staff time will be needed to coordinate mobility management activities, an investment that is expected to streamline service delivery, particularly for demand-response (reservation-based) transportation services. For example, with better outreach and information sharing, calls to customer service departments from customers looking for services other providers offer can be expected to diminish over time. In addition, the MMP will support expansion of travel training, which can lead to increased use of fixed-route services.

NEXT STEPS / AGENCY COMMITMENTS

Public entities that oversee and provide transportation services are invited to participate in the MMP. With a goal of program rollout in FY2024, the next step in the MMIS process is for participating entities to commit to supporting the MMP. Each participating agency is being asked to provide a written statement endorsing the proposed framework and pledging limited staff time (estimated at one-two hours per week on average) to support the program. This is in addition to any current commitments to support the MCC. Suggested endorsement language is provided in Chapter 7.

The study team is prepared to present the proposed MMP at future agency meetings with the goal of completing this process no later than March 2023.

1 INTRODUCTION

The Capital Area Metropolitan Planning Organization (CAMPO) with support from Wake County, the City of Raleigh, and the Town of Cary are working to implement a regional mobility management strategy, known as the Mobility Management Implementation Study (MMIS). The MMIS encompasses CAMPO's entire planning area, including all of Wake and parts of Johnston, Harnett, Franklin, and Granville counties. See Figure 1.

STUDY GOALS

The goals of the MMIS are to:

- Provide expert, concise, and comprehensive information and recommendations to help determine participation levels in the regional mobility management program.
- Clarify best practices, approach, and structure for implementing a mobility management program.
- Through an interagency agreement, incentivize partnerships and coordination to build a successful, scalable mobility management program.
- Assist participating agencies in establishing a viable mobility management program that lays a strong foundation for future growth and improved coordination.
- Develop an implementation strategy, plan, and schedule.

The MMIS has two phases. Phase I, the subject of this report, explored the readiness, options, and foundation for a mobility management program. Phase II will refine the implementation strategy for participating agencies.

PROJECT BACKGROUND

The 2018 Updated Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP) for Wake County and the Raleigh Urbanized Area, also known as the CAMPO Study Area, was adopted by the CAMPO board in February 2019, and amended in February 2020. The CPT-HSTP recommended as a key strategy implementation of a mobility management program with a primary focus on the rural areas of the region in particular rural Wake County and Johnston County.

A summary of CPT-HSTP recommendations and excerpts of the mobility management program recommendations are provided in Appendix A. The CPT-HSTP plan also recommended establishment of a Mobility Coordination Committee (MCC), which was established with the following purpose:

The intent of establishing the Mobility Coordination Committee (MCC) was to create the infrastructure and an organization to manage and guide ongoing coordination activities in the urbanized area and to assign this group responsibility for implementing the CPT-HSTP goals and recommendations. Consisting of staff level agency participants, the MCC provides policy recommendations, acts as a sounding board for stakeholders and helps provide oversight while deploying the recommendations outlined in the plan. Recommendations are presented in three implementation tiers: short-, medium-, and longer-term timeframes. (CPT-HSTP, Section 6).

This MMIS operationalizes the CPT-HSTP's mobility management recommendations.

ORGANIZATIONAL FRAMEWORK

The MMIS is sponsored by four organizations: CAMPO, Wake County, the City of Raleigh, and the Town of Cary. CAMPO is responsible for managing the consultant contract with Nelson\Nygaard. A technical steering committee (TSC) consists of the four sponsoring organizations and representatives of the transit agencies, county and municipal departments, and others.

TECHNICAL STEERING COMMITTEE (TSC)

The member agencies invited and/or represented on the TSC are listed below. Most agencies have more than one representative to ensure regular attendance at TSC meetings throughout the course of the project and to help support stakeholder education and participation.

- CAMPO
- Live Well Wake
- Go Raleigh
- NCDOT IMD
- Harnett Area Rural Transit System (HARTS)
- GoWake Access
- Town of Apex
- Community Partnership Network
- Town of Wendell
- Southern Regional Center
- Eastern Regional Center

- Johnston County Area Transit (JCATS)
- Community & Senior Services of Johnston County
- Kerr Area Transportation Authority
 (KARTS)
- Town of Cary
- GoTriangle

- Northern Regional Center
- Housing Authority of Wake Co.
- Wake County Veterans
 Administration

2 MMIS TASKS

The project includes two phases with the overall study scheduled for completion by June 2023. See Figure 2. This report is the deliverable for Task 7 (bolded below).

Task	Phase	Description				
1	&	Project management & coordination				
2	I	view of key studies & plans				
3	I	Review of existing & planned services & programs				
4	&	Engagement & presentations				
5	I	Peer review & best practices analysis				
6	I	ecommended implementation framework & associated transit service impacts				
7	I	hase I "white paper" recommendations & report				
8	&	nteragency participation agreement				
9	II	Detailed implementation strategy				
10	II	Participants' operational review, analysis, & recommendations				
11	II	Public outreach & engagement strategy				
12		Study final report				

Figure 2 MMIS Tasks

COMPLETED PROJECT DELIVERABLES

To date, the consultant team has delivered several work products that are summarized below.

Informational Materials on Mobility Management

The consultant team produced an introductory flyer on mobility management as well as a longer mobility management primer. See Figure 3.

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Figure 3 Excerpt from Mobility Management Flyer

Capital Area Mobility Management Implementation Study (MMIS)



What is Mobility Management? Mobility Management programs connect people with disabilities, seniors, and low-income individuals with accessible, reliable transportation options.

These programs seek to identify gaps and barriers to public transportation that prevent individuals from using existing services. Once gaps have been uncovered, Mobility Managers work with partners from the transportation and human service communities to find creative solutions, creating a "one-stop shop" where people can find transportation service that meets their needs.

MMIS Project Goals



Existing Conditions and Foundation Technical Memorandum (Tasks 2 and 3)

The combined Task 2 and 3 technical memorandum summarizes early study work to compile studies and data and obtain input from key stakeholders and challenges and needs. It provides:

- A summary of key studies and plans, including studies relevant to mobility management and other transportation studies
- A description of fixed-route and demand-response transportation providers including additional data that updates information compiled for the CPT-HSTP and considerations related to the MMIS
- A description of other entities, including recipients of Federal Transit Administration (FTA) Section 5310 funding (for older adults and people with disabilities), and other entities who require public transportation services

 A description of key state funding programs used by demand-response transportation providers

Key findings applicable to the MMIS documented in the technical memorandum were:

- GoRaleigh, GoCary, and GoTriangle provide fixed-route bus service and complementary paratransit while GoWake Access, JCATS, and KARTS offer traditional advance-reservation demand-response service. New local bus routes are also available in the Towns of Apex and Wake Forest. Same-day demandresponse service is available in Morrisville (Town of Morrisville) and Northeast Wake County (GoWake Access/SmartRide NE).
- The region is growing, and the cost of housing is increasing. According to individuals interviewed for this task, many people who depend on public transportation cannot find affordable housing near a bus route or live in areas with little or no service.
- Wake County's regional centers have pursued an effective approach to meeting clients' transportation needs. For example, during the Eastern Regional Center's client intake process, staff asked standard questions about the social determinants of health, including access to transportation. Staff refer these clients to available resources and follow up on referrals made. This referral and followup approach is an excellent example of mobility management in practice.
- As the population ages (either current or new residents), demand for public transportation will grow generally. For example, the Town of Cary has seen substantial growth in the number of riders eligible for its non-ADA demandresponse service.
- Driver shortages are impacting providers' ability to meet demand. Driver-related issues were present prior to the COVID-19 pandemic and the situation worsened during the pandemic.
- For providers serving more rural parts of the CAMPO planning area, there is a desire to coordinate trips and ultimately be able to transfer riders between demand-response providers and or with fixed-route services. To increase the number of transfers, more transfer-friendly facilities are needed.
- There remains a continuing interest in offering on-demand public transportation services. In the CAMPO region, this is being offered as microtransit. The nodebased service operating in Morrisville has been working well since it was launched in October 2021 and the GoWake Access SmartRide NE pilot, which began in March 2022 is an important test of rural microtransit's viability.
- Opportunities exist to offer better trip planning in instances where individuals' needs are not met by fixed route options.

- Coordinating travel via integrating technology is likely to be very difficult given differing jurisdictions. On the other hand, efforts are already underway to coordinate with partners and this should continue.
- Fixed route providers are not actively providing travel training. Given the role that travel training plays in mobility management, the program framing process should include a discussion of travel training.
- Support for mobility management varies. While providers expressed support for the services, more work is needed to better describe what a program might look like and how it would be funded. Given the role transportation plays in human services, involving human services staff in shaping a mobility management program will be important.

Recent changes to North Carolina's non-emergency medical transportation (NEMT) rules alters how trips are delivered and reimbursed. Prior to Medicaid Transformation, coordinated public transportation was often the provider of choice for NEMT that originated from the county-based Division of Social Services (DSS). Under the changed NEMT service structure and the introduction of private for-profit transportation brokers, public transportation providers are experiencing reductions in NEMT trip volumes and other community-based programs.

This will have budget impacts for GoWake Access, JCATS, HARTS, and KARTS so the state, affected agencies and stakeholders are researching revenue impact using case studies and data review.

Engagement Plan (Task 4)

The plan outlines steps to engage the region's public transportation providers, associated government and nonprofit entities, and representative riders and advocates in the implementation of a mobility management program. The plan's goal is to obtain broad support for establishing sustainable mobility management activities throughout the region, tailored to need, interest level, and available resources. The plan describes opportunities for engagement including:

- Meetings and interviews with key individuals
- TSC meetings and workshops
- Targeted engagement with representative stakeholders

The plan includes a strategy for engaging with stakeholders through focus groups (described below) and for seeking support for the program design from agency staff and their governing bodies.¹

Summary of Peer Best Practices and Strategies (Task 5)

This report discusses mobility management and related activities in six regions across the U.S. The discussion of each region includes a regional context, a description of ongoing or planned activities, and considerations for this MMIS. The six regions studied were:

- Austin, Texas
- Columbus, Ohio
- Denver, Colorado
- Nashville, Tennessee
- San Francisco, California
- Charlotte, North Carolina

The report's level of detail varies by region, based in part on how mobility management differs, the age of the program, funding, and other factors. For certain regions, the discussion is extensive and is offered as a resource; it was felt that providing the information would be of some value even if some of the peer descriptions include less detail. Based on interviews conducted for this project and additional consultant research, the report provides initial applicable strategies with examples, including.

- Establish mobility management employment guidelines
- Develop, maintain, and publish transportation resource information
- Integrate mobility management information into transportation websites
- Train customer service staff to assist with management
- Integrate transportation demand management and mobility management

Recommended Implementation Framework (Task 6)

The Task 6 recommended implementation framework proposes a design for the region's mobility management program. The report outlines the vision and goals for regional

¹ During Phase II of the MMIS, the consultant team will design a strategy for marketing mobility management and presenting it to the public.

Task 7 Recommended Mobility Management Framework NC CAMPO | City of Raleigh | Wake County | Town of Cary

mobility management and the consultant team's program recommendations. A comprehensive table of strategies organizes the program into actions and implementation steps, including a suggested timeframe and metrics for tracking progress. Additional information on the basis for specific recommendations is included. This includes recommendations on organization structure and location, governance, staffing, support, and equipment, funding, and budget as summarized in Chapter 6.

3 COLLABORATION & OUTREACH

TSC COORDINATION

The MMIS TSC has met five times over the course of the project. See Figure 4.

Meeting Date	Topics Discussed/Areas of Focus
September 21, 2021	Project team and TSC member introductions, project overview
October 19, 2021	Working session to review foundational tasks 2 and 3 and discuss presentations and engagement for Task 4. Also discussed peer review regions.
January 13, 2022	Presented initial findings of Tasks 2 and 3, progress on peer research, and confirmed outreach materials to be used for governing board engagement, including a schedule for such meetings.
April 19, 2022	Held an in-person workshop to design the mobility management program, including identifying priorities and effective ways to obtain user input and market to existing and future users.
October 18, 2022	Held an in-person meeting to review and discuss the draft MMIS implementation framework.

Figure 4 TSC Meetings Held to Date

PRESENTATIONS TO GOVERNING BODIES & OTHERS

In the winter of 2021, members of the TSC, CAMPO staff, and the consultant team met with several agency governing bodies and others to introduce the MMIS and seek input. The team provided participants with the MMIS flyer and primer and gave a brief presentation. Figure 5 lists the organizations and meeting dates. The team provided materials but did not meet with the Wake Transit Policy Advisory Committee (TPAC).

Figure 5 MMIS Introductory Mee	etings
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Organization	Presentation Date
JCATS Transportation Advisory Board (TAB)	2/10/22
GoWake Access TAB	2/10/22

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Organization	Presentation Date
GoRaleigh RTA Board of Directors	2/10/22
City of Raleigh City Council	3/15/22
City of Raleigh Mayor's Committee for Persons with Disabilities	2/17/22
GoCary Transportation Working Group	2/15/22
CAMPO Technical Coordinating Committee (TCC)	2/3/22
CAMPO Executive Board	2/9/22
KARTS Executive Board/TAB	4/15/22

FOCUS GROUPS

In the summer of 2022, the team arranged for two virtual focus groups to seek input from providers/helpers and from riders. (See Appendix B)

Provider/Helper Focus Group

Held on July 28, 2022, the provider/helper focus group was attended by eight participants, not including CAMPO or consultant staff. The meeting included a PowerPoint presentation describing the overall mobility management program vision and use of a whiteboard to record comments about three topics:

- 1. Improving access to quality information
- 2. Program priorities where to focus resource first
- 3. Outreach how to promote the program to riders and others

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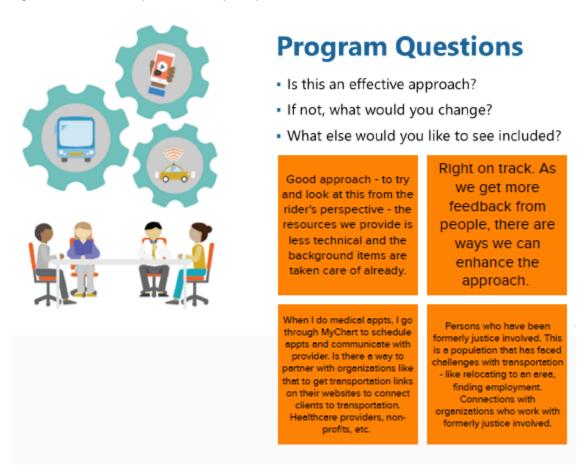


Figure 6 Provider/Helper Focus Group Sample Whiteboard Slide

Rider Focus Group

Held on August 18, 2022, the provider/helper focus group was attended by ten participants, not including CAMPO or consultant staff. The meeting included a PowerPoint presentation describing the overall mobility management program vision and use of a whiteboard to record comments about three topics:

- 1. Improving access to quality information
- 2. Program priorities where to focus resource first
- 3. Outreach how to promote the program to riders and others

Meeting summaries for both focus groups are provided in Appendix B. The team used input from these meetings to refine the proposed program design.

4 RECOMMENDED MOBILITY MANAGEMENT PROGRAM

This chapter presents a summary of the recommended mobility management program for the CAMPO region. It reflects input from the two focus groups, and comments from TSC members provided in writing and at the in-person meeting held on October 18, 2022.

PROGRAM VISION

Through a mobility management program (MMP) that grows and evolves over time, the CAMPO region will deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The MMP will help riders better connect to and use public transportation services (fixed route, traditional demand response, and on-demand such as microtransit). The MMP will streamline the process of finding travel options in areas where fixed route services are not available. Older adults, people with disabilities, and people with low incomes, and those who help them, advocate for them, or plan for their needs will benefit from vastly improved coordination. Eventually, more trips will be shared among providers and accessible technology will improve the user experience. The program will produce measurable benefits and its lessons will inform other future investments in improved transportation.

PROGRAM ELEMENTS

The following are the proposed mobility management program (MMP) program elements:

• The MMP should be centralized within a single agency. For program administration purposes, the team recommends that CAMPO administer the program and hire the mobility manager.

- Initially, one full-time employee should be hired as a regional mobility manger and provided with office space and equipment, comparable to other CAMPO staff.
- While the regional mobility manager would be employed by CAMPO, they would be expected to spend some of their in-office time rotating among the provider agencies (GoCary, GoRaleigh, GoWake Access, possibly GoTriangle, and participating county agencies such as JCATS) at least initially. Rotating among providers will help to both build partnerships and to enable the mobility manager to gain a deep understanding of operations at the various agencies.
- The Mobility Coordination Committee (MCC) would serve as the steering committee for the MMP; the MCC's role and function would need to be formalized to provide this support.
- The MMP would evolve over a minimum five-year time horizon in three phases: short-term (years 1-2), medium term (years 3-4) and longer-term (year 5 and beyond).
- Initial MMP funding would be from FTA Section 5310 resources. If by the end of the 2nd year the program grows and requires further staffing, additional funds may be needed.
- The MMP should be evaluated using quantitative and qualitative performance measures. (See Chapter 5 Table). Data should be compiled, analyzed, and reported out every six months.
- Community outreach and marketing would be informed by the Phase I input and the forthcoming public outreach & engagement strategy (Task 11 in Phase II of the MMIS). The overall strategy would include partnership building with providers, other agencies, and external entities and extensive engagement with program beneficiaries.

PROGRAM GOALS

The recommended program goals are:

- 1. Through **engagement**, **outreach**, **and coordination**, offer consistent and easily accessible information on available public transportation services,
- 2. Through **data collection**, **needs assessment**, **and program design**, better address the concerns of people who face mobility challenges, and
- 3. Through **program evaluation and refinement**, promote and improve coordination and use of technology among providers leading to a better user experience, more transportation services, and reduced operating costs.

PROGRAM ACTIONS

The following are the recommended actions aimed at achieving the MMP goals:

- Hire and train a new staff person no later than the first part of Fiscal Year (FY) 2024.
- Through a formalized MCC, provide consistent staff guidance and feedback to ensure successful program rollout and sustainability.
- Consolidate, centralize, and maintain current transportation information for individuals seeking rides and for those working with riders (e.g., social workers, employers, healthcare providers, etc.)
- Design and implement the forthcoming communications and outreach strategy aimed at building partnerships with providers and others and marketing available mobility management services.
- Collaboration with providers of travel training services (transit agencies, schools, nonprofits, etc.) to expand travel training opportunities throughout the region.
- In consultation with the MCC and other coordinating bodies such as the CAMPO TCC and the Wake Transit Transportation Planning Advisory Committee (TPAC), develop and maintain performance monitoring and tracking tools that include both quantitative and qualitative information to improve coordination, regional transportation planning, and internal and external reporting. Share results with MCC every six months and with the TCC/TPAC/Executive Board at least once per year.
- Use lessons learned and trends analyses to revisit MMP program design and suggest changes.
- Work with the MCC to help develop the CPT-HSTP recommendations.
- Determine the longer-term potential for trip sharing, especially among rural providers, including the potential of technology to facilitate it.

PROGRAM PHASING

The MMP is expected to evolve in three phases over approximately five years. Figure 7 broadly illustrates these phases: Phase 1) startup and rollout, Phase 2) refinement and expansion, and Phase 3) technology integration and trip coordination. Key areas of emphasis are noted during each phase. The highlighted activities are not fully sequential, meaning certain elements continue from inception forward as the program evolves and grows.

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Figure 7 MMIS Implementation Phases



CONSIDERATIONS FOR TRANSIT AGENCY PARTNERS

In crafting the scope of work for the MMIS, the project sponsors asked for specific input on how the MMP might impact transit services. The following discussion of transit agencies covers policy considerations, staffing, agency websites, client referrals, and general benefits.

Existing Agency Policies and Operating Resources Would Not Be Impacted

- Each transit provider would continue to manage, set policies for, and operate its own fixed-route, complementary paratransit, or demand-response transportation with direction provided by governing bodies, not by the MMP.
- Any future collaboration on transit agency policies for service delivery, fares, ADA, etc. will continue via the Mobility Coordination Committee (MCC).
- Initial funding should come from FTA Section 5310 funds; separate transit agency or MPO funds are not being sought to establish the MMP. The City of Raleigh and CAMPO would collaborate on administering the 5310 funding for the MMP.

Additional Agency Staff Time Will be Required

 Although the recommended MMP includes hiring a regional mobility manager, each participating agency would be expected to devote some staff resources to the program. This would include regularly participating in and contributing to the MCC and providing guidance and feedback to the mobility manager. Agency staff should also be expected to review data and evaluate program performance, participate in travel training activities, or other program components. Separate from MCC activities, each participating agency would be expected to devote time (e.g., one- two hours per week on average) to working on mobility management projects in collaboration with the mobility manager. This would include orienting the mobility manager to provider operations, holding one-on-one meetings, and providing input on provider services for inclusion in mobility management resource materials. It could also include working on updating customer service protocols (see below) so when riders contact the provider seeking information about services outside the provider's service area, the customer service teams know what information to provide and how to make referrals.

Some Website and Customer Service Protocol Updates May Be Needed

- To address customers' transportation needs beyond currently published information, as a best practice, each agency should look to collaborate with the other agencies to update their websites and customer service protocols. This may involve adding statements to trip planning webpages such as, "The trip you requested is outside of [agency's] service area. Please see the region's mobility management webpage [add link] for further information]."
- Agencies may need to update their customer service procedures to provide similar information to callers. This would likely include customer service agents referring to the new MMP webpage to provide callers information on which agency to contact as applicable.

Rider Referrals May Increase

- Through outreach and assistance, the MMP will refer individuals to available transit services. This will likely lead to more customers for transit providers.
- Ideally, MMP referrals will increase fixed-route ridership. Transit agencies that
 provide complementary paratransit could see new applications for ADA
 paratransit eligibility and may also see more individuals interested in receiving
 travel training for fixed-route service. Such referrals should be tracked both by
 the mobility manager and by the agencies. One way for agencies to track such
 referrals would be to modify ADA paratransit applications to include a question
 about how the applicant learned about the service.
- Microtransit and other demand-response providers can also anticipate more referrals from the MMP.

Agencies Can Expect Benefits from the MMP

- As noted, transit agencies operating fixed-route service will likely see additional bus riders, which is desirable. Additional travel training participation could lead to some complementary paratransit riders using fixed route more often.²
- Improved websites and clear customer service protocols can reduce call volumes and shorten calls for those seeking assistance that an individual agency may not be able to offer.
- The MMP will coordinate activities that include both transit providers and human services agencies.
- Improving mobility, particularly for vulnerable populations, can lead to improved health outcomes, which both helps the individual and the overall healthcare system.

² The CPT-HSTP recommended that the MCC develop and implement regional travel training program to transition some ADA paratransit riders to the fixed route network.

5 IMPLEMENTATION STRATEGIES

This chapter presents specific implementation strategies to achieve the proposed MMP goals in the form of a table, which organizes the MMP implementation strategies within the three main program goals as outlined earlier in this report:

- 1. Through **engagement**, **outreach**, **and coordination**, offer consistent and easily accessible information on available public transportation services,
- 2. Through **data collection, needs assessment, and program design**, better address the concerns of people who face mobility challenges, and
- 3. Through **program evaluation and refinement**, promote and improve coordination and use of technology among providers leading to a better user experience, more transportation services, and reduced operating costs

The intent of the table is to provide an overview of the actions tied to the MMP goals. Priority strategies are shaded and noted. Some high-level explanatory notes are provided along with specific strategy steps, timeframe, and suggested measures to be used to track progress. Details will be further refined during Phase II of the MMIS.

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Figure 8 Summary of Mobility Management Program (MMP) Goals and Actions

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination	Conduct partner outreach Priority Strategy	 Participation of all public transportation providers in the region's MMP is expected but to be effective, ongoing engagement will be critical. Other agency, nonprofit, institutional, medical, and educational partners should also be part of outreach Peer programs regularly and fully engage with providers to develop and strengthen relationships with agency staff Program staff must demonstrate the value of continued engagement with the MMP 	 Begin by working through the MCC to establish and confirm each agency's MMP liaison Identify other potential partners and interested parties Develop a schedule for periodic check-ins Participate in partner events as appropriate See relationship building discussion in Chapter 6 	 Begin at program start Ongoing strategy 	 Meetings held and events attended Number of participants (external events) Comments received on program effectiveness and actions taken
Engagement, Outreach, and Coordination	Develop mobility management identity and brand <i>Priority Strategy</i>	 Low awareness and understanding of MM Brand will help build awareness and support GoForward brand is widely adopted for fixed route, ADA, and GoWake Access, but local and non-Wake services not linked to GoForward Many peer mobility management programs such as DRMAC have a well-defined brand and identify 	 Create regional MM program brand and identity and use for all emails, publicity, and related collateral Consider relationship to GoForward to avoid confusion Conduct follow-up surveys on brand awareness 	 Year 1 (end) 	 Specific resources created and shared using brand Brand survey results

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination	Develop and eventually publish public-facing materials <i>Priority Strategy</i>	 Outreach for MMIS has included initial materials Increased awareness is needed Publicity will be needed to grow the program and collateral materials will help Publication of public mobility management resources is a peer best practice 	 Use brand and identity in all electronic and printed media Identify translation needs for outreach materials Develop text and graphics for flyers, posters, and other material, including email formats, etc. Develop materials tailored to social media Disseminate printed materials at events See discussion of improving access to information in Chapter 6 	 Year 1 (end); revise as needed 	 Materials produced and distributed and/or downloaded
Engagement, Outreach, and Coordination	Conduct client outreach Priority Strategy	 MM efforts are currently internally focused (MCC) More outreach is needed to promote the MMP and integrate with ongoing transportation services and activities Ongoing outreach is a best practice 	 Identify priority groups for outreach and input Periodically meet with interested groups Integrate branded materials when available Seek feedback annually to inform program improvement or redesign in subsequent years (if needed) See relationship building discussion in Chapter 6 	 Year 1 Ongoing 	 Meetings held and events attended Number of participants Comments received on program effectiveness and actions taken
Engagement, Outreach, and Coordination	Participate in regional transportation planning coordination	 Advocacy is needed for MM, particularly in rural areas Data obtained through outreach and interactions will support future decisions As region grows and new services are planned, MM needs to be involved 	 Participate in ongoing transportation planning activities 	 Year 2 (launch) Ongoing 	 Meetings attended Committees joined Notes

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Data Collection, Needs Assessment, and Program Design	Develop and maintain transportation services information and database <i>Priority Strategy</i>	 The CPT-HSTP identified the need to improve information about the availability of existing services. Consolidating service information and making it broadly available is a key tenet of mobility management Almost all peers compile provider data (printed, website, formal travel planner) Process of compiling and maintaining information will improve coordination through relationships that are established 	 Develop electronic resource (spreadsheet or database) listing all available service characteristics Seek participation from all providers to regularly share information updates Work with each CAMPO area provider to provide consistent information to callers and on websites with links Publish information as a downloadable document See MM webpage strategy See discussion of improving access to information in Chapter 3 	 Year 1 (end): compile hard copy Year 2 (end) develop electronic version Revise annually 	 Participating agencies Number and type of documents distributed and/or downloaded Frequency and timing of updates
Data Collection, Needs Assessment, and Program Design	Design, launch, and maintain mobility management website	 Peer local/regional MM programs have dedicated websites (see DRMAC's <u>Getting There Guide)</u> Should be part of brand awareness and outreach efforts Can be a source for document downloads, requests for assistance, participation in webinars and conferences, etc. 	 Develop dedicated MM website Ask each provider to link to the dedicated MM site from their own websites 	 Year 1 (end): complete: basic landing page describing program Year 2 (end): launch website Revise annually 	 Publication of site Visitors Document downloads, including directory

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Data Collection, Needs Assessment, and Program Design	Refer riders to transportation options Priority Strategy	 Some MM programs make direct transportation referrals. The MM staff person should be equipped to direct any inquiries received to specific providers and track instances when solutions are not available. This task is challenging without an online trip planner or staffed call center Initially, MM efforts should focus on coordination with agencies and nonprofits and not on clients 	 Document all available transportation services and eligibility rules Establish an agency or nonprofit inquiry form through the website and respond within 1 business day 	 Year 1: begin referrals Ongoing 	 Agency and organization contacts Referrals provided Solutions not found

Goal Category	Action	Observations/Notes	Steps		Timeframe	Tracking/Reporting
Data Collection, Needs Assessment, and Program Design	Compile data, records of client and agency contacts, and lessons learned Priority Strategy	 CPT-HSTP noted need to track and report transportation demand in rural communities to identify how needs are being met and what else is needed According to national research, successful mobility management programs conduct ongoing assessments of transportation needs in their community so they can effectively respond to changes and modify their programs accordingly. Efforts to advocate for more services depend on well documented needs, particularly trend analysis 	Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance) Consider developing a data dashboard for use in meetings with other agencies and sponsors See discussion of program refinement strategies in Chapter 3	•	Year 1: basic reports End of Year 2: data dashboard Ongoing	Trend analyses Clients served Agencies participating Unmet needs (i.e., solutions not available for requests made)

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Data Collection, Needs Assessment, and Program Design	Refer riders to travel training	 CPT-HSTP noted need to expand travel training to rural areas and to areas with new fixed-route services Many local/regional peers offer travel training services Programs are tailored to individuals with different disabilities and to older adults that retire from driving Some peers provide training directly, others refer to existing programs, and others also train travel trainers to offer peer-to- peer training or specialized training 	 Identify past and existing travel training programs in the region, including those by transit providers and those by other agencies Build a network of trainers who can expand to other areas Possibly directly deliver training in rural areas where needed, but additional resources would likely be required 	 Years 1-2: refer to existing programs Year 3+: deliver training in rural areas 	 Training requests Trainers trained Training provided
Program Evaluation and Refinement	Meet regularly with decisionmakers Priority Strategy	 Support exists for MM conceptually, but participation and funding commitments are needed Periodic presentations will build awareness and support 	 Identify priority boards and committees for initial and follow-up outreach Attend meetings in person and collect feedback See discussion of program refinement strategies in Chapter 3 	 Priority 1 Ongoing 	 Meetings attended with basic summaries Comments received and actions taken

Task 7 Recommended Mobility Management Framework

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Goal Category	Action	Observations/Notes	Steps Timeframe Tracking/Reporting
Program Evaluation and Refinement	Use compiled data and records of client and agency contacts to refine program priorities Priority Strategy	 According to national research, successful programs establish methods for assessing program progress and outcomes and for communicating to appropriate decision makers and audiences Mobility managers work with local stakeholders to refine program goals based on quantitative and qualitative measures 	 Based on data tracking covered in other action items, compile surveys, results of outreach, and other metrics Produce and disseminate reports every six months Seek feedback from others and guidance from MCC on program refinements See discussion of program refinement strategies in Chapter 3 Every 6 months Every 6 months Include narratives of client and partner interactions See other strategy measures
Program Evaluation and Refinement	Staff training and development Priority Strategy	 Mobility managers hired for the region should have professional development and networking opportunities to both learn from others and to consider mobility management a career A newly established certification program launched in November 2022 (see Easer Seals Project Action website) 	 Allocate time for annual professional development and budget for conference attendance and certification courses Establish goals for annual professional development Monitor progress Once certification obtained, maintain Year 1 Ongoing Year 1 Ongoing Conferences attended Contacts identified Progress toward certification (credit hours completed Maintenance of certification

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Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Program Evaluation and Refinement	Technology assistance and advocacy	 CPT-HSTP notes need to represent rural residents in conversations about technology More on-demand services are being provided (e.g., GoWake SmartRide NE) or considered Trip planning via smartphones is more common, but demand- response transportation options are not integrated The GoTriangle reginal transit technology study did not fully consider demand- response transportation, including microtransit. 	 Participate in ongoing regional transportation technology discussions Understand how users are learning about services Advocate for including all services in technology integration efforts 	• Year 3+	 Document technology challenges raised during outreach and coordination, including meetings attended Track relevant technology evolution and use

6 STRATEGY DISCUSSION

This chapter provides additional details on the recommended framework and the MMP goals and actions.

FRAMEWORK RECOMMENDATIONS EXPLAINED

Organization Structure and Location

Recommendation: The overall program should be centralized within a single agency (CAMPO) and not distributed among providers.

At the regional and local levels, mobility management programs are typically centralized within one agency. Some state programs allocate mobility management funds to transit partners who then use these funds to directly provide mobility management services. This is discussed in the Task 5 Peer Reviews report (see Nashville). Choices regarding which centralized agency include a regional or local transit provider (see Austin and San Francisco), a nonprofit organization (see Denver), or a regional planning agency (e.g., Greater Portland (Portland) Council of Governments).

While the regional mobility manager would be employed by CAMPO, they would be expected to spend some of their in-office time rotating among the provider agencies (GoCary, GoRaleigh, GoWake Access, possibly GoTriangle, and participating county agencies such as JCATS) at least initially. Rotating among providers will help to both build partnerships and to enable the mobility manager to gain a deep understanding of operations at the various agencies.

Governance

Recommendation: The Mobility Coordination Committee (MCC) should serve as the steering committee for the MMP; the MCC's role and function will need to be formalized to provide this support.

As a recommendation of the 2018 Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP), CAMPO established the MCC. The intent of establishing the MCC was to create the infrastructure and an organization to manage and guide ongoing coordination activities in the urbanized area and to assign this group responsibility for implementing goals and recommendations identified in the CPT-HSTP.

At present, the MCC is organized informally, meaning there are no bylaws or procedures for voting on potential policies. Given the MCC will effectively be overseeing a program that uses federal and potentially local grant funds, the MCC will need to be formalized.

The MMIS includes future consideration of the need for interlocal agreements for participation in the MMP. Ideally, all providers will agree that participation in the program is beneficial and be willing to both support implementation of the MMP and commit to full participation in the MCC. At a minimum, participating would mean attending periodic coordination meetings to provide direction, feedback, and support to the mobility manager. While unlikely, should some agencies decline to participate or agree to participate but then limit their participation,, the program can continue but should be tailored accordingly. There is considerable work to be done in the region and many of the identified actions can be completed independent of agencies that limit or restrict participation.

Staffing, Support, and Equipment

Recommendation: Initially, one full-time employee should be hired and provided with office space and equipment, comparable to other CAMPO employees and supported by part time as-needed administrative help. The level and extent of administrative support from CAMPO is difficult to estimate, but it could be expected to include support for working with vendors and staffing outreach activities and special events as capacity permits.

It is reasonable to suggest that having more than one person to launch the MMP might enhance its immediate impact. The consultant team recommends beginning with one person initially so as not to overinvest resources prior to demonstrating success. The actions identified in the strategy table call for the mobility manager to report progress to the MCC every six months and to the TCC/TPAC/Executive Board annually. Should partner interest indicate additional staffing resources are needed, then the MCC should prepare a request and advocate for more resources or modify the scope of the mobility manger's portfolio.

Funding and Budget

Recommendation: Initial MMP funding is proposed to be from FTA Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) resources and is estimated to cost \$250,000–\$300,000 for the first two years, including expenses. If by the

end of the 2nd year the program grows and requires further staffing, additional funds may be needed. Strategies for this program are anticipated to cover a five-year period.

As with many of the regions studied for the best practices task, FTA Section 5310 funding is a commonly used funding source and is eligible as a capital expense, which means that 80% of the annual cost may be federally funded and a 20% local match would be needed. In addition, federal transit funds may be used for program administration, and mobility management is an eligible administrative expense. The FTA program rules assigns responsibility for project selection to the designated recipient (City of Raleigh) and gives the recipient the option to choose whether to include a competitive selection process. In other words, with the City of Raleigh's support, the MMP can be fully funded without additional funds from partners or other funding sources.

STRATEGY FOCUS AREAS EXPLAINED

Improving Access to Information

To improve access to transportation information, the mobility manager should:

- Become well versed on the full range of public and private transportation services in the CAMPO region.
- Meet with the individual providers to understand how they organize transportation information, including their outreach activities, customer services, etc. and identify similarities and inconsistencies.
- Organize available information and be prepared to answer inquiries from individuals or organizations seeking transportation services either directly or by making referrals.
- Develop and give presentations on mobility management to local transportation entities such as transportation advisory boards (TABs), CAMPO's TPAC, the MCC, etc. and seek input on what needs can be addressed through the mobility management program.
- Develop and give presentations on mobility management to other government organizations and nonprofit groups and seek input on what needs can be addressed through the mobility management program.
- Use engagement to identify geographic and temporal service gaps across the CAMPO region.
- Document and report progress and findings with input from the MCC. This should include documentation of geographic and temporal service gaps.

Building Relationships Through Engagement, Outreach, and Collaboration

Building on the education and outreach activities, the mobility manager should strive to build and maintain ongoing relationships with transportation providers, agency and nonprofit staff that work with vulnerable populations, and others who can improve regional mobility or benefit from mobility management. Suggested tasks include:

- Join or arrange regular discussion groups focused on improving mobility, perhaps focusing on subregions such as rural areas, areas seeing rapid population growth, or areas with new transportation services such as microtransit. Another approach is to focus on specific topic areas such as access to healthcare, access to education, access to employment, or the use of technology.
- Once relationships are established, either through discussion groups or outreach, meet with partners regularly to learn about progress, challenges, and opportunities.
- As appropriate, the mobility manager should travel throughout the CAMPO region and attend meetings organized by others and be a well-known presence and resource.
- Progress should be documented through records of meeting attendance, key takeaways, and lessons learned, including an assessment of progress made in building and maintaining relationships.

Managing, Refining, and Advancing the MMP

Once the mobility manager is hired and with input from the MCC, the program will need to be refined and advanced. This will require regular documentation and reporting, analysis of trends, and identification of improvement opportunities. Suggested tasks include:

- Attend all MCC meetings. Work as directed to support the MCC.
- Prepare reports on external meetings attended and outreach activities conducted.
- Tabulate statistics on user interactions, either through outreach or in response to inquiries.
- Analyze patterns or trends and prepare recommendations on areas of improvement.
- Develop recommendations for establishing consistency among providers for information referrals including websites and customer service protocols.

- In collaboration with operating partners, evaluate the need for transportation brochures or information clearinghouses such as a one-call/one-click resource.
- Identify regional travel training resources and needs.
- Identify and share public and private grant funding opportunities and support the application process.
- Participate in budget discussions for future mobility management funding.

7 PARTICIPATION COMMITMENT

TSC SUPPORT OBTAINED

At the meeting of the TSC held on October 18, 2022, representatives of the partner agencies voiced support for the proposed mobility management framework. This included:

- GoCary
- GoTriangle
- GoRaleigh
- Wake County

Other TSC members voicing support included representatives from:

- JCATS
- Town of Apex
- Transformation Exchange

With a goal of program rollout in FY2024, the next step in the MMIS is to obtain a more formal commitment from participating agencies. This varies by organization but should include at minimum a written statement endorsing the proposed framework and pledging staff time (estimated at one-two hours per week on average) to support the program. This is in addition to any current commitments to support the MCC.

SUGGESTED LANGUAGE FOR ENDORSEMENT

The following is suggested language for program partners to formally endorse the proposed mobility management framework and to pledge staff commitment to program support.

[Agency Name] has reviewed the proposed CAMPO region mobility management program framework report prepared for the Mobility Management Implementation Study. This report summarizes tasks completed during the project's first phase, including outreach activities and recommends steps for the region to implement a regional mobility management program beginning at the start of FY 2024.

[Agency Name] endorses the recommendations made in the mobility management framework plan. In addition, [Agency Name] pledges to work collaboratively with the regional mobility manager and will direct staff resources accordingly to ensure a strong regional program. In addition, [Agency Name] pledges to continue to support the Mobility Coordination Committee (MCC) in its ongoing mission to continue to guide ongoing coordination activities and to implement the recommendations of the region's coordinated public transithuman services transportation plan (CPT-HSTP).

OUTREACH TIMELINE

Each participating transportation provider on the TSC is asked to seek formal endorsement of the proposed framework in December and January. The study team is prepared to present the framework to any governing bodies as required. The report will then be shared with/presented to the CAMPO TCC and Executive Board for formal endorsement no later than March 2023.

Appendix A

MOBILITY MANAGEMENT RECOMMENDATIONS (EXCERPTED FROM CPT-HSPT)

Short Term Recommendations (2019–2022)

From Figure 6-1 Recommendations Implementation Table (short-term recommendations)

- 1.1 Establish Mobility Coordination Committee (MCC)
- 1.2 Create consistent regional UZA ADA structure incorporated into individual provider ADA plans
- 1.3 Coordinate ADA service delivery
- 1.4 Initiate rural transportation network
- 1.5 Monitor state Medicaid transportation program
- 1.6 Develop mobility management program
- 1.7 Develop emerging mobility policy (supported as part of Task 1.6)

Develop Rural Mobility Management Program

Mobility management provides a "case worker" approach to solving transportation needs by helping individuals (or organizations) understand their options and how to access transportation services...It helps coordinate public transit and human service transportation because the case worker has access to the full set of transportation services and collaborates with individuals to match needs with available travel options. The CPT-HSTP Update recommends developing a mobility management program with a focus on western Johnston County and Wake County's rural and small -town communities.

Based on direction from the CAMPO Executive Board leadership, the recommendation 'Develop a Mobility Management Program was advanced from a Tier II - Medium Term Recommendation to begin in the year 2023 to a Tier I recommendation that begins in 2019. However, developing the program including the addition of a mobility manager can be used to help assist the MCC (made up of various agency staff and stakeholders) implement the plans recommendations and assist in the coordination.

A mobility management program will help address gaps identified in the CPT-HSTP Update that demonstrated a need for increasingly accessible transportation in Wake's rural communities and areas in western Johnston County, including the Town of Clayton. The mobility manager program will also be able to collect data on needs to help influence other human service transportation programs and services. A mobility management program can be developed quickly and efficiently with the MCC using funding from the Wake Transit Plan or FTA 5310 funding.

Key steps to program development include:

- Research various types of mobility management models and ensure consistency with regional needs.
- Confirm and prioritize mobility management program goals and prepare a program budget and organizational location for staff.
- Finalize and apply for funding source and hire mobility manager(s).
- Work with stakeholders to advertise services and encourage them to refer clients to mobility manager. Develop referral infrastructure as needed.
- Evaluate program at six-month intervals at least for the first 18 months of program implementation. Adjust and refine program based on evaluation findings.
- Consider alternatives to address human service inter-county transportation needs and demands

Once developed, the mobility management program can also assist with a variety of other rural transportation programs in Wake and Johnston Counties. In Wake County, mobility management program staff could collaborate with Regional Center staff to help clients find transportation and potentially work with town staff to develop Community Funding Area Programs. Regional Center staff could also work with a mobility management program to develop and support zone-based transportation scheduling, so that trips are coordinated and scheduled regionally. In Johnston County, mobility management staff could work with Johnston County staff to help streamline and improve the referral and trip referral processes, as well as increase ride sharing to reduce the cost per trip. Finally, the mobility management program would also represent rural residents in conversations about emerging mobility and implementation of programs like travel training but also accessible technologies. Combined, there are numerous ways and opportunities for the mobility management program in Wake and Johnston counties to become a critical part of the network of resources linking travelers, towns/cities, human service agencies and the Wake Transit Plan investments. There are a handful of concerns with this approach including identifying a lead agency, developing a structure to share costs, and ensuring the program's administration costs are effectively managed.

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The MCC will create a forum to discuss opportunities to oversee the implementation of new services and identify opportunities to coordinate services in rural areas. The CPT-HSTP Update recommends moving towards mobility management but implementing this slightly later in the program. In the meantime, MCC can help build infrastructure for mobility management through improved data collection, travel training, and work with GoWake Access TAB, the Regional Centers in Wake County, and the Johnston County TAB.

Appendix B

MOBILITY MANAGEMENT FOCUS GROUP SUMMARIES

PROVIDER/HELPER FOCUS GROUP SUMMARY July 28, 2022

Name	Affiliation
Barclay Williams	Eastern Wake Service Center
Michael Thomas	Parent of rider
Darryl Blevins	Eastern Wake Service Center
Richie Hayner	Southern Wake Service Center
Azalea Garza-Orozco	Raleigh PD
Timothy Winn	Dorcas Ministries
Dennis Jarmon	Step Up Ministries
Neal Davis	JCATS
Crystal Odum	САМРО
Bonnie Parker	САМРО
Bill Schwartz	Nelson\Nygaard
Simone Robinson	Public Participation Partners
Chanel Nestor	Public Participation Partners

Zoom Meeting Attendees

Notes taken for this meeting are attributed to individual participants and also recorded on the Mural board.

Tell us how you obtain information about transportation services today and what needs improving.

- Dennis Jarmon (Step Up Ministries) Life skills program and employment training workshop - have some people who use public transit. Some people are further away from bus services. Some people have cars. We get on the internet to find out what other organizations are using. We have used Uber to get people to get to and from services. Some challenges: scheduling and timeliness and cost efficiency.
- **TeLeishia Holloway (GoCary)** Working with clients trying to figure out how to get to their destination. A lot of people don't live within the Town of Cary limits,

but need to get from their location to Cary to elsewhere. A lot of clients might be too old or not have the ability to transfer between multiple different transit services. Want to transfer seamlessly and efficiently and cost effectively between different lines.

- Michael Thomas (Parent of Rider) Adult son with special needs looking for transportation that is accessible. Exploring the GoRaleigh process and how it works. Have reached out to contact there (coordinating with someone there). Need help with transportation for work. GoRaleigh process is pretty seamless. Now they approve it for 4 years. Live two miles further than the allowed. One driver working with them.
- Azalea Garza-Orozco (Raleigh PD) Individuals that we work with set them up with a GoRaleigh account, work with Medicaid transportation. Have the liberty of transporting individuals as long as we have another officer with us. We work with people who have mental health, substance abuse, or people experiencing homelessness. Individuals we work with are never in custody. Public transportation have app on phone. Often trying to allow them to be independent. Provide them with bus route, give them a schedule and possible ways of going.
- Barclay Williams (Eastern Wake Service Center) Have used online and internet to look up bus schedules for GoRaleigh - noticed that there are different connections. Connecting people to Raleigh outside the SmartRide is often challenging. There is non-emergency medical transportation through Medicaid. Users work through the healthcare providers for that. Online is the best resource I know of.
- Darryl Blevins (Eastern Wake Service Center) SmartRide NE because of the geo area that has been serviced in the East of the County it's a bit more difficult in the less dense area to meet the needs and SmartRide has been helpful to get people to food, housing, resources. Population we serve in Eastern Regional Center (3,000-4,000 people per month) trying to connect people to transportation is important for their success. We have developed a coalition of partners. Tried to learn more about the resources in the County to connect people to those resources. Building partnerships and utilizing/connecting people to those assets. Often add transportation to funding requests. Still a real struggle in the rural parts of the County.
- Neal Davis (JCATS) Johnston County As a service provider (JCATS) one of the challenges we face are the numerous funding buckets we have to work from in order to fund rides. When a caller or rider requests a ride, we have to first qualify who can pay for the ride. Anything we can do to make that less complicated and

remove barriers would be good. We are planning to do a microtransit study hoping to launch a microtransit zone in Smithfield-Selma area. This is contingent on software modules to make the smartphone app available (currently in final stages of development). Envisioning that we'll use in-house resources to do this (including existing vehicles) - would like to brand differently, but in order to gauge demand using existing vehicles. Clayton would be another area we're looking at. Other challenge is non-emergency medical transportation - we've introduced another layer of management (brokers responsible for arranging transportation instead of employees in transportation) - has led to some operational issues. Concerns about how it impacts statewide model. Don't want Medicaid transportation taken away from larger transportation model/system. Important to increase connections/partnerships with Triangle region.

- Frazelle Hampton (Step Up Ministries) Primarily use transportation as a means to help participants have a way to leave and get home from programming on Tuesday nights. Have had conversations on how to provide - settled on Uber. Didn't feel like the bus system here was an option, so set on Uber and paying for individuals to get home. Employment training programming - that is done via online services right now, but once we reengage that, need to consider how to get individuals back and forth.
- Richie Hayner (Southern Wake Service Center) Southern Regional Center -Limited - often have to do some research. We don't have a lot of public transportation - a lot of people come through Medicaid transportation or through GoWake. We see a lot of people get dropped off - barter for a ride if they don't have transportation themselves. Fuquay transportation does some rides (like kids to Charter schools) - but it's a paid service. See a lot of helping professionals step up and do things for families/multiple families. People have to step in and figure out how to do it because there aren't formal resources to rely on. Need more of a framework.
- Timothy Winn (Dorcas Ministries) Case Manager (non-profit serves people in crisis Cary/Morrisville). Free bus system during COVID has been very helpful, especially for homeless clients. Heard and seen that more bus routes are needed outside Raleigh/Cary in order for clients to find housing and better employment opportunities, especially in rural areas. Go to the website (GoCary or GoRaleigh) have been able to help clients navigate. A lot of people are limited difficult to come to food pantry and do shopping and get back with all their groceries.

Information Questions

Is this an effective approach? If not, what would you change? What else would you like to see included?

- Richie Hayner (Southern Wake Service Center) Thought the three bullets were right on spot - centralized, updated, current. People get frustrated if something's linking to five different places, it can get overwhelming. Suggest having something simple with a quick shot of menu rather than too many details all upfront (have links to more detail). Not getting re-routed to 15 different places to find the info they need.
- TeLeishia Holloway (GoCary) Having a centralized location is definitely effective. Customer service contact should be on centralized pages for regional or individual agencies. Having that information in a centralized area will be timesaving.
- Neal Davis (JCATS) Linking transportation agency's website to others' website or a mobility management website is a great idea. Embedded summaries of other services would help keep it from becoming too cumbersome.
- Dennis Jarmon (Step Up Ministries) On the right path something like this would be beneficial for any organization seeking ways to utilize transportation services out there. Central location and not having to be redirected would be the best possible solution.

Program Questions

Is this an effective approach? If not, what would you change? What else would you like to see included?

- Neal Davis (JCATS) Good approach to try and look at this from the rider's perspective - the resources we provide is less technical and the background items are taken care of already.
- **Darryl Blevins (Eastern Wake Service Center)** Right on track. As we get more feedback from people, there are ways we can enhance the approach.
- Darryl Blevins (Eastern Wake Service Center) When I do medical appts, I go through MyChart to schedule appts and communicate with provider. Is there a way to partner with organizations like that to get transportation links on their websites to connect clients to transportation, healthcare providers, non-profits, etc.
- **Dennis Jarmon (Step Up Ministries)** Persons who have been formerly justice involved. This is a population that has faced challenges with transportation like

Mobility Management Focus Group

A conversation about improving transportation information and coordination



Welcome and Introductions

rezi

The Reason for Today's Discussion

- Help our region implement services and programs that offer better transportation information for riders, service providers, and others
- Hear about your experiences working with people who need transportation services (buses, van services, private transportation)
- Seek your input on our ideas for program improvements and how best to promote the program to others



Obtaining Transportation Information

rezi

Tell us how you obtain information about transportation services today and what needs improving







Mobility Management Vision

rezi

Vision for Improvement through Mobility Management



Vision for Improvement

A mobility manager will coordinate information, programs, and activities



Vision for Improvement

Information will be readily available and transportation options will be more easily understood



Vision for Improvement

As the program evolves, people will be able to plan trips better, access services more easily, and traveling will be more convenient.



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Questions and Feedback

rezi

Topics of Conversation

- 1. Improving access to quality information
- 2. Program priorities where to focus resource first
- 3. Outreach how to promote the program to riders and others



Questions

- Is this an effective approach?
- If not, what would you change?
- What else would you like to see included?





Information Should be...

- Comprehensive
 - Includes all available transportation services
 - Explains rules, fares, hours of service, etc.
- Consolidated and Consistent
 - Call one phone number or visit one website to obtain information
 - Websites provide consistent links and customer service staff provide similar guidance/referrals
- Current
 - Information is updated regularly



Information Questions

- Is this an effective approach?
- If not, what would you change?
- What else would you like to see included?



Program Priorities Should be...

- Client focused
 - Aim to improve the rider experience
 - Address current and future needs
- Regional in coverage
 - Focus on services and needs throughout the region, not just Wake County
 - Emphasize demand-response services and connections to fixed-route services
- Collaborative in process
 - Seek to collaborate with transportation professionals, social workers, faith leaders, businesses, and the public



Program Questions

- Is this an effective approach?
- If not, what would you change?
- What else would you like to see included?



Outreach Should be...

Visible

- Regular participation of staff in public events
- Customers and professionals know about the program
- Responsive
 - Inquiries are answered promptly
- Flexible
 - Solutions are tailored to needs that arise

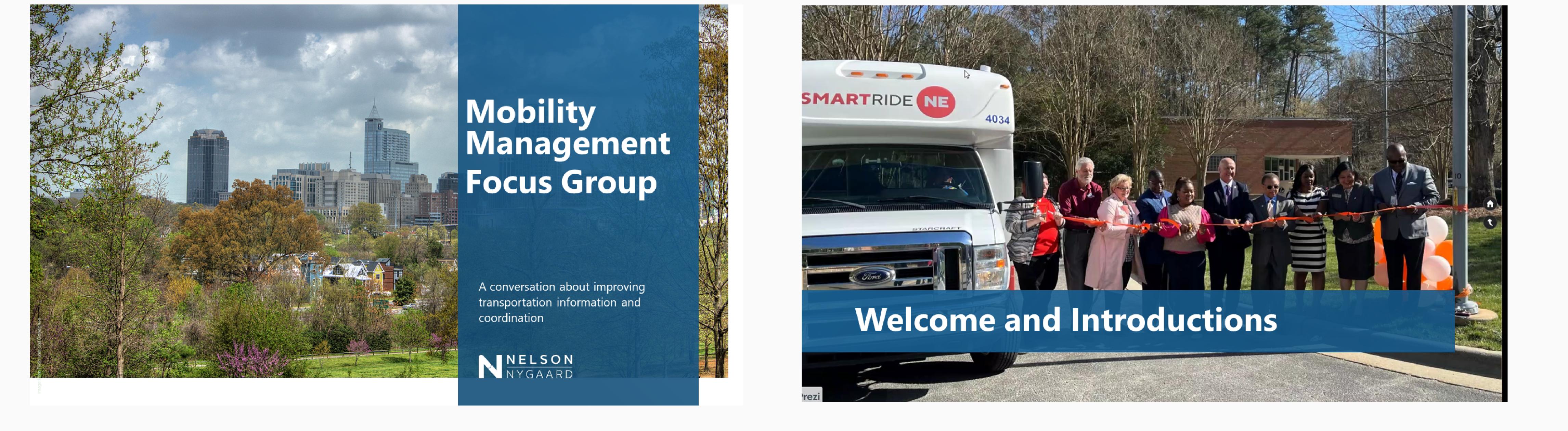


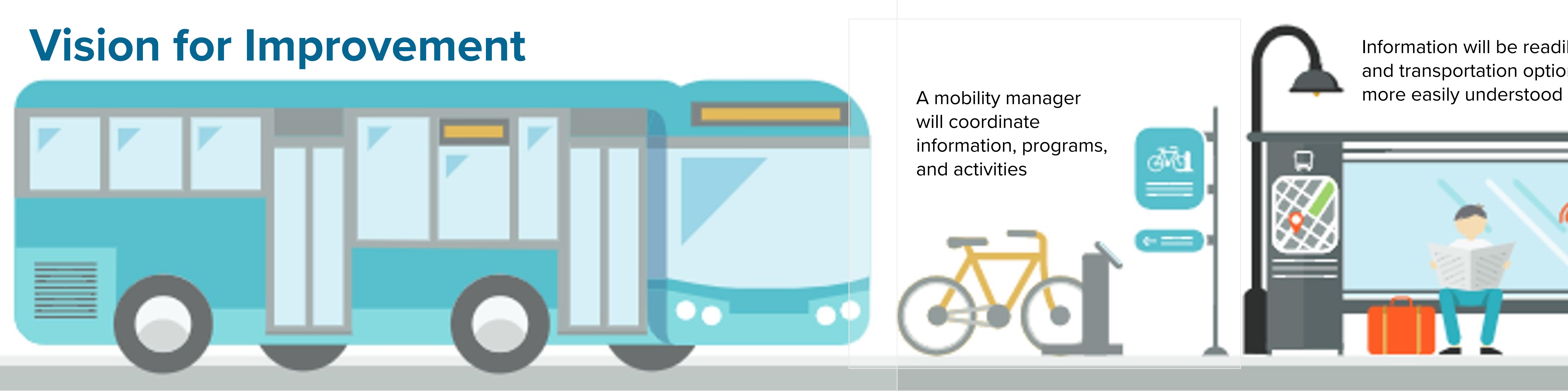
Outreach Questions

- Is this an effective approach?
- If not, what would you change?
- What else would you like to see included?
- How should we inform people about this new resource?

Final Thoughts









Topics of Conversation

- Program priorities where to focus resource first
- . Outreach how to promote the program to riders and others



Program Priorities Should be...

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Improving access to quality information



Questions

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Program Questions

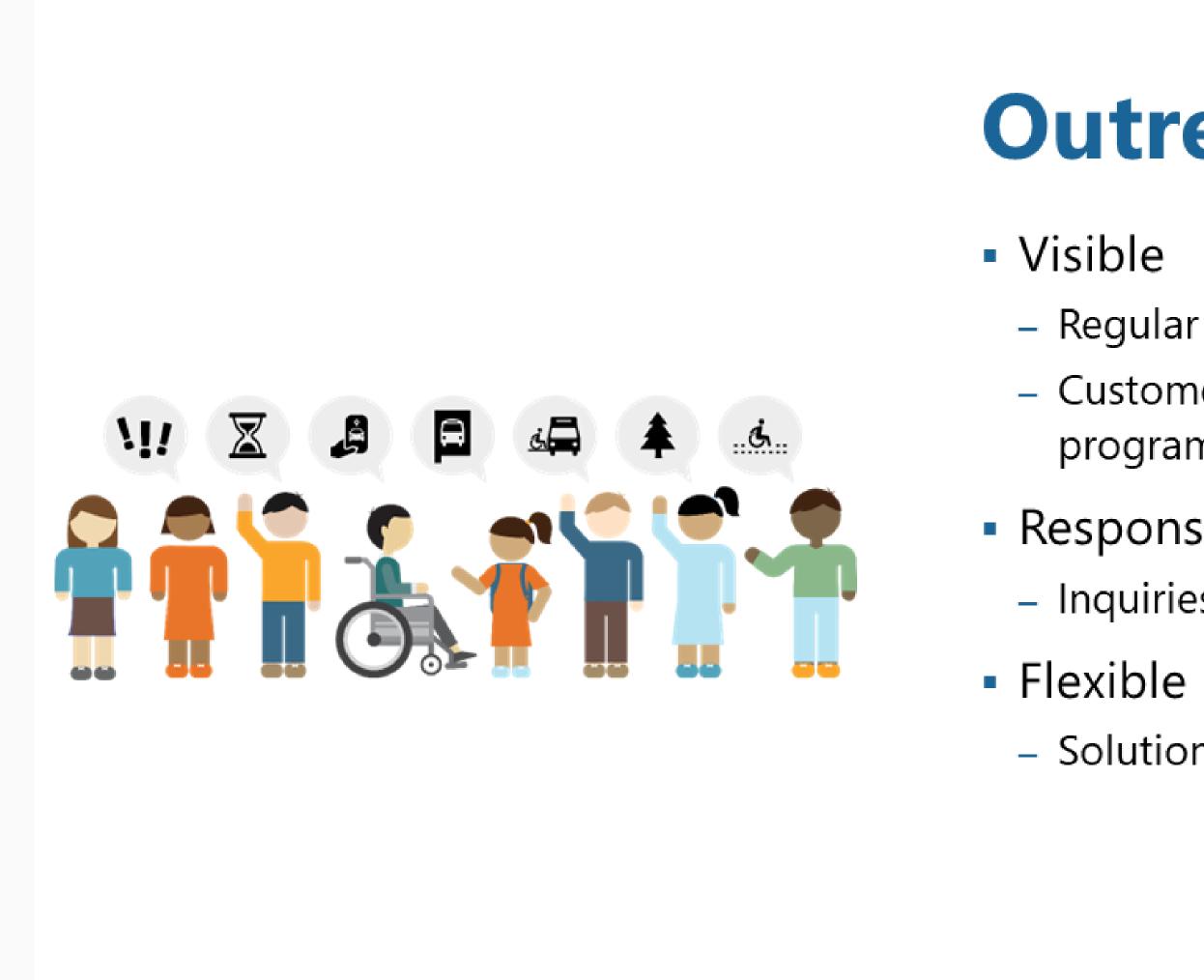
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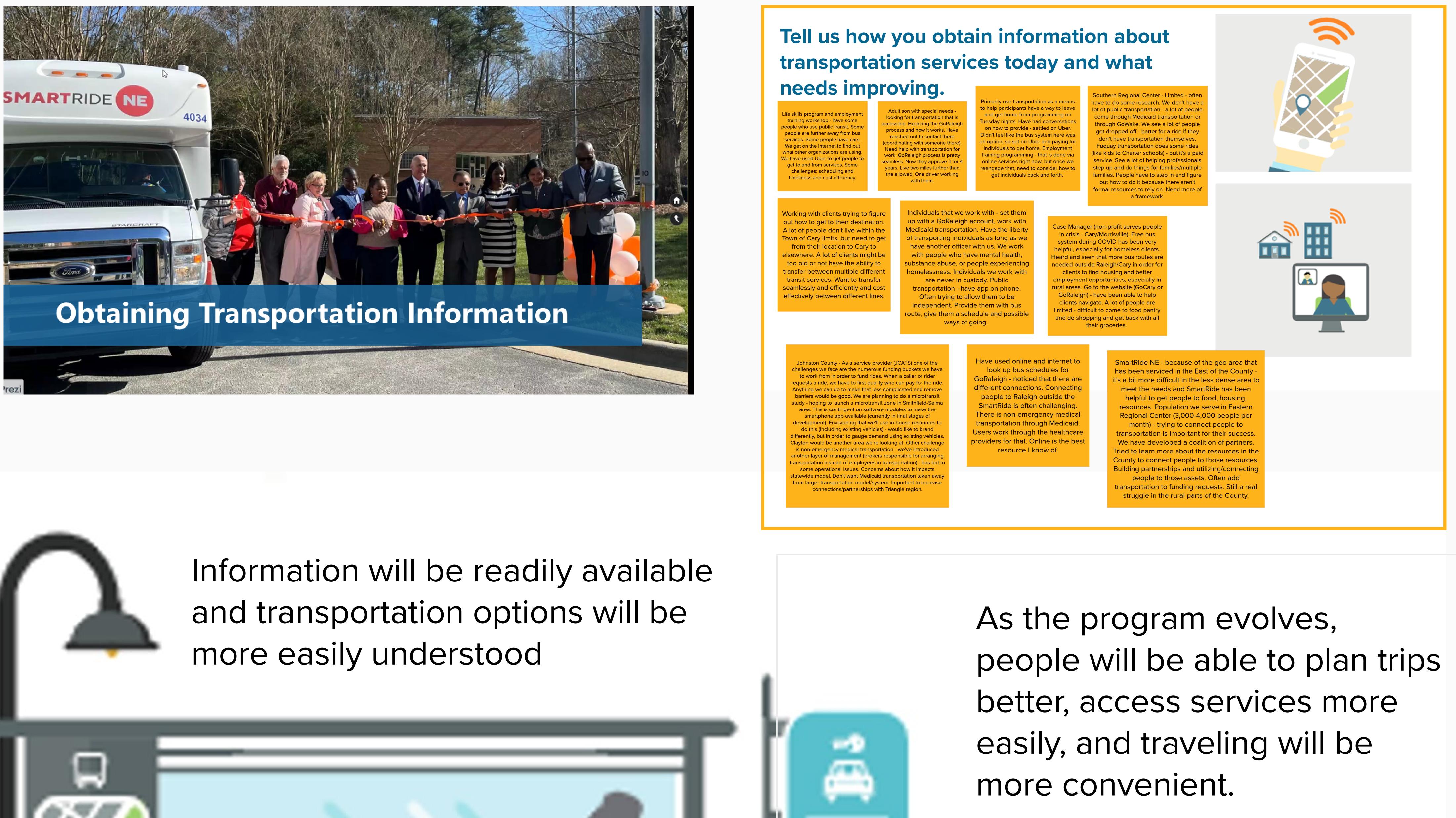
Persons who have beer

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Thank you.Contact Information:Bill Schwartz, AICP







Outreach Should be...

 Regular participation of staff in public events Customers and professionals know about the program

Responsive

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Information Should be...

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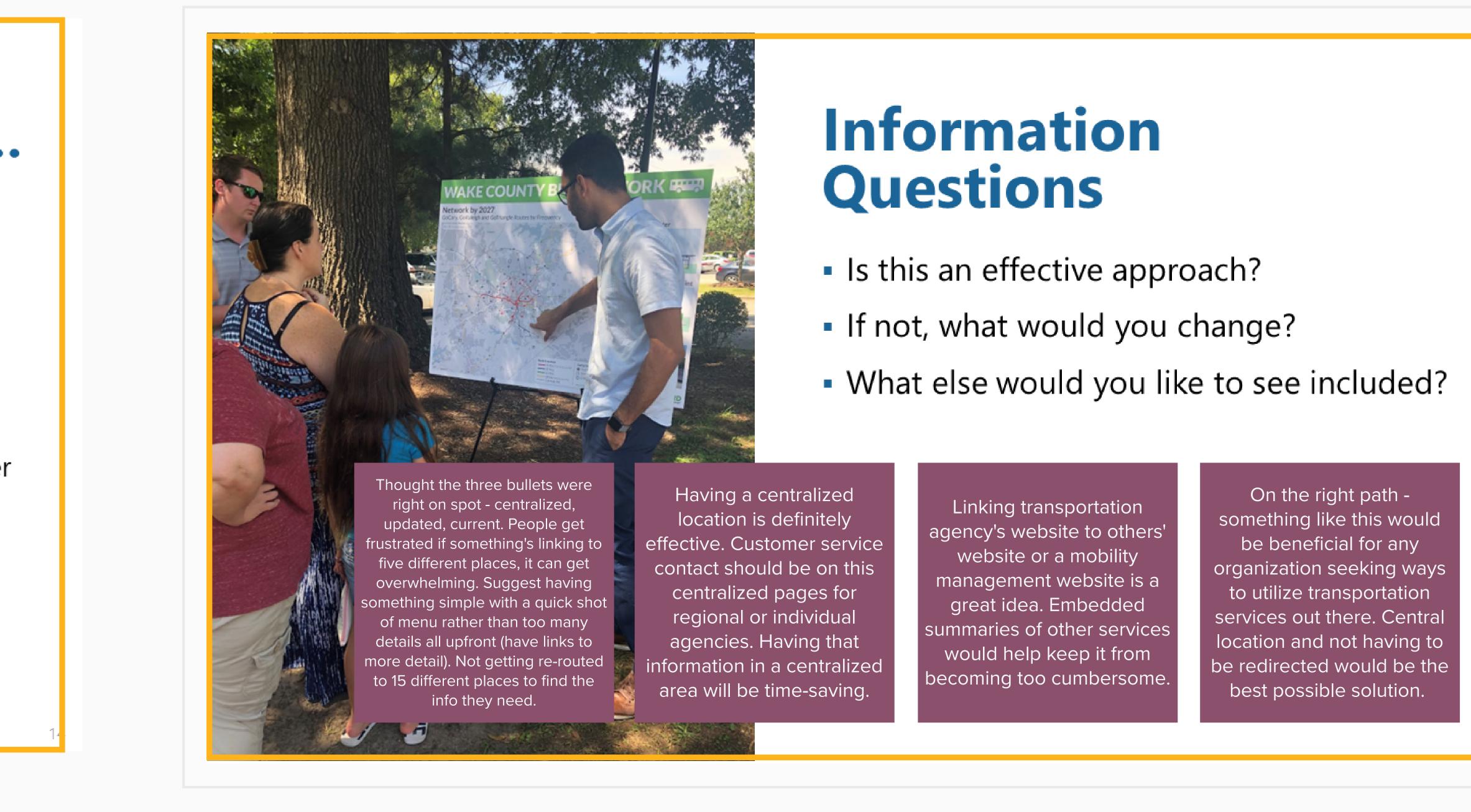
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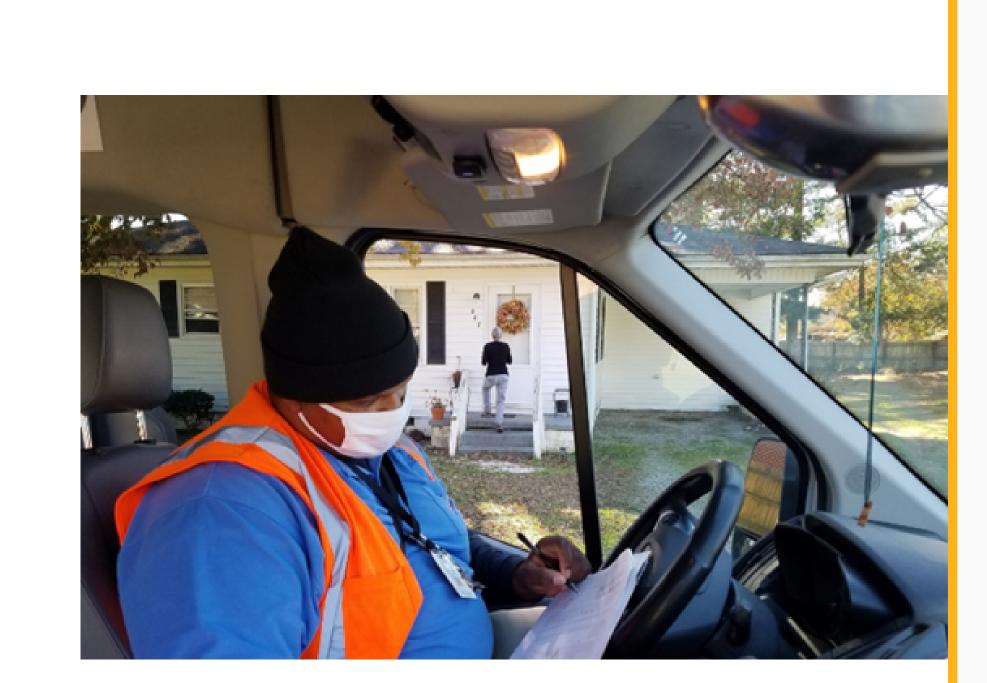
NYGAARD **Contact Information:** Principal bschwartz@nelsonnygaard.com (857) 305-8012





Final Thoughts

would you see the role of this program be in that?



RIDER FOCUS GROUP SUMMARY

August 18, 2022

Name	Affiliation
Holly Gallagher	Habitat Wake
Debra L Franklin	Tar State Transportation Alliance
Myra Gaines	Rider
Ricky Scott	Rider
Karen Morant	Wake County
Diane Bonczyk	Rider
Jay Pande	Rider
Diane Rocker	Rider
Fred Johnson	Rider
Sharif Brown	Rider
Crystal Odum	САМРО
Bonnie Parker	САМРО
Bill Schwartz	Nelson\Nygaard
Simone Robinson	Public Participation Partners
Chanel Nestor	Public Participation Partners

Zoom Meeting Attendees

Notes taken for this meeting are recorded on the Mural board.

Discussion Questions

What do you think about the vision for the mobility management program?

• The MM is an interesting concept, and I would like to speak with someone who can provide me with options that meet my needs.

Are we moving in the right direction?

- Going in the right direction in terms of coordination and providing information in a centralized way. More than one person will be needed to implement this.
- On the right path as far as trying to increase ridership. Rural counties in the Triangle don't have fixed routes but do have paratransit service which requires 24-hour advanced planning, but life doesn't often happen that way. Utilizing a fixed route is probably going to be the most important aspect to someone's independence to get around without spending a lot of money on Uber and paratransit tickets. Schematically it will be difficult, but you'll have to pool as many resources as you can.
- I think that you are moving in the right direction. I like what I heard tonight. The information is good but if it isn't implemented well then it won't work.

Is there anything missing?

- Those with vision impairments and other disabilities are not often consulted when organizations develop websites with information that those individuals need – accessible only to some.
- MMIS needs to have someone who is an expert in universal design to develop the website to ensure that the provided information is fully accessible at launch.

What are the best ways to promote mobility management to riders and others?

- Go through the social services organizations and churches
- Research other programs to see what works for them
- Conduct meetings at existing city/county meetings/events for the disabled
- Joining agencies like NAMI
- Mayor's Disability Council meetings
- Word of Mouth

Is transportation information readily available? How do you obtain information?

- No all information isn't available and it might be helpful to have.
- Our agency receives information directly. Our agency also works with area transportation agencies and advocacy organizations, but the public isn't receiving this information.

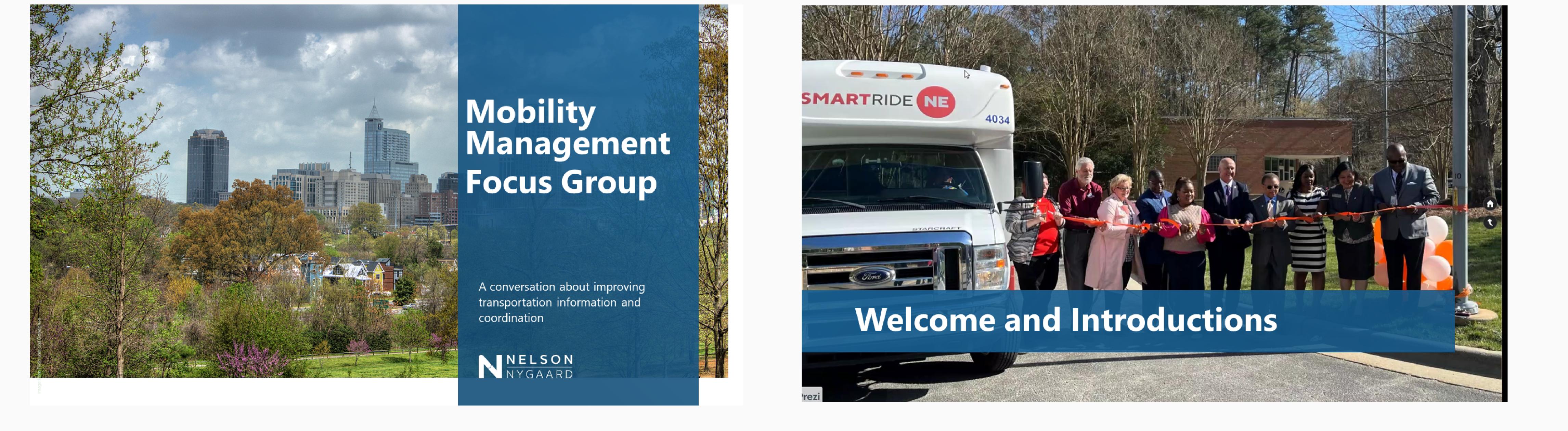
 NC Innovations Waiver Community Navigator provides me with information. I am also on disability information listservs.

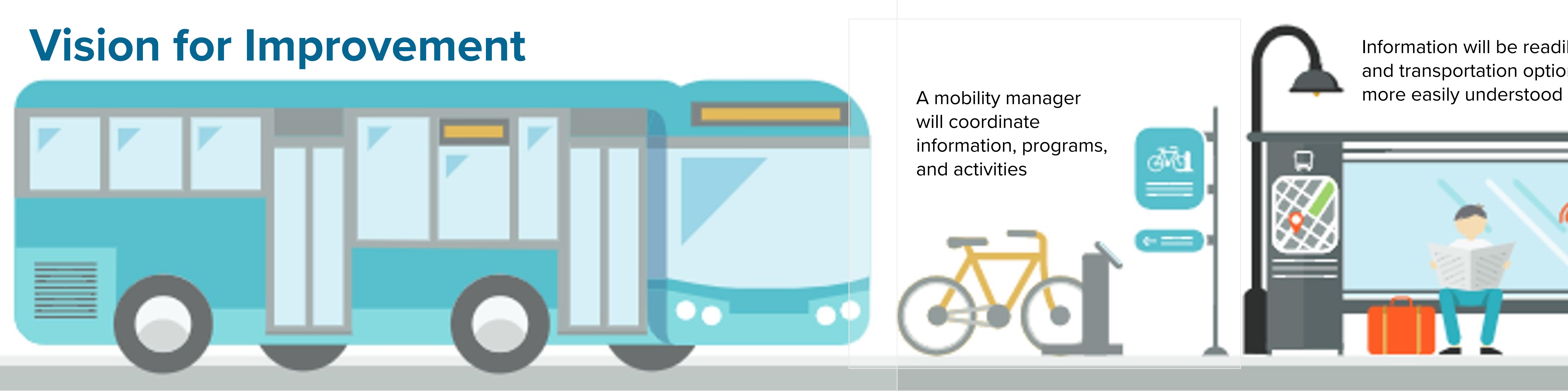
Overall Comments

- ADA NC has travel training videos 5 video series set about how to plan trips, what to expect, etc. The videos are accessible and include close caption.
 Education through fun: https://adanc.org/resources/travel-training/
- Because of my disability I have given up on public transit because I need more time to get to and from the bus, so it is easier for me to get rides from others. Public transit also takes a long time. I'm not sure that based on the current options if there is a public transportation service that won't require a bunch of additional time and effort in planning everything.
- It would be good if there were other options. Microtransit sounds interesting but I'm not sure how it would work for users with walkers and wheelchairs.
- Past efforts have attempted to improve services and it never developed. There
 was a lot of pushback from COR to get information for riders, especially those
 with disabilities. The issue has been addressed many times over the years but
 never resolved.
- It is important to reach residents that live in the areas outside of the city or county. It is necessary to include them in the outreach. They may not know about what is going on.

Attendee Questions

- Q: Do you have plans to target your outreach to areas with affordable housing or households with lower incomes?
- A: The MM will reach out when needed and suggestions will be sought. The person in this role will conduct research and develop a list of contacts to identify where the needs are.
- Q: Does this program cover Johnston County?
- A: It covers the Greater Wake/Triangle Area of the CAMPO region, including a portion of Johnston County.







Topics of Conversation

- Program priorities where to focus resource first
- . Outreach how to promote the program to riders and others



Program Priorities Should be...

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Improving access to quality information



Questions

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Program Questions

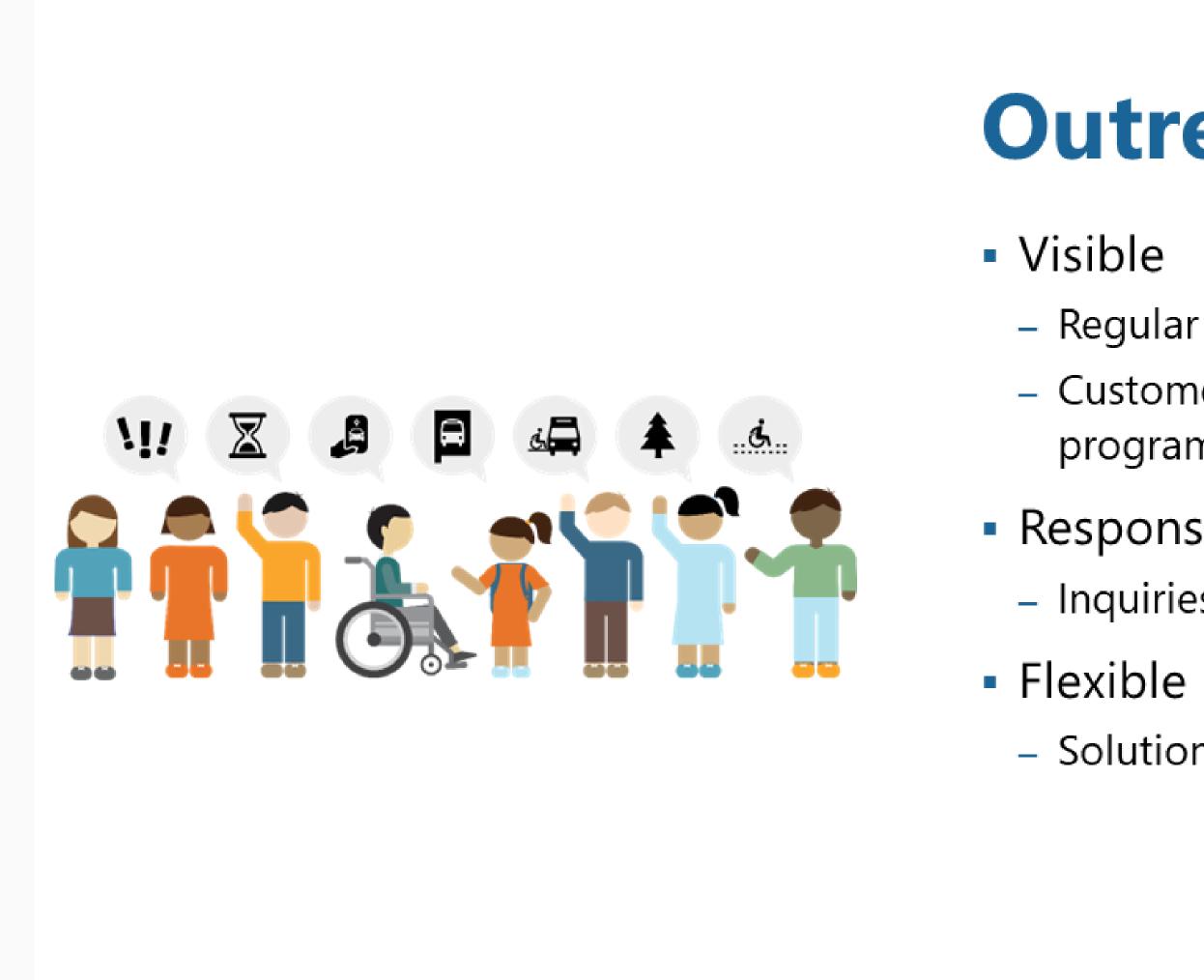
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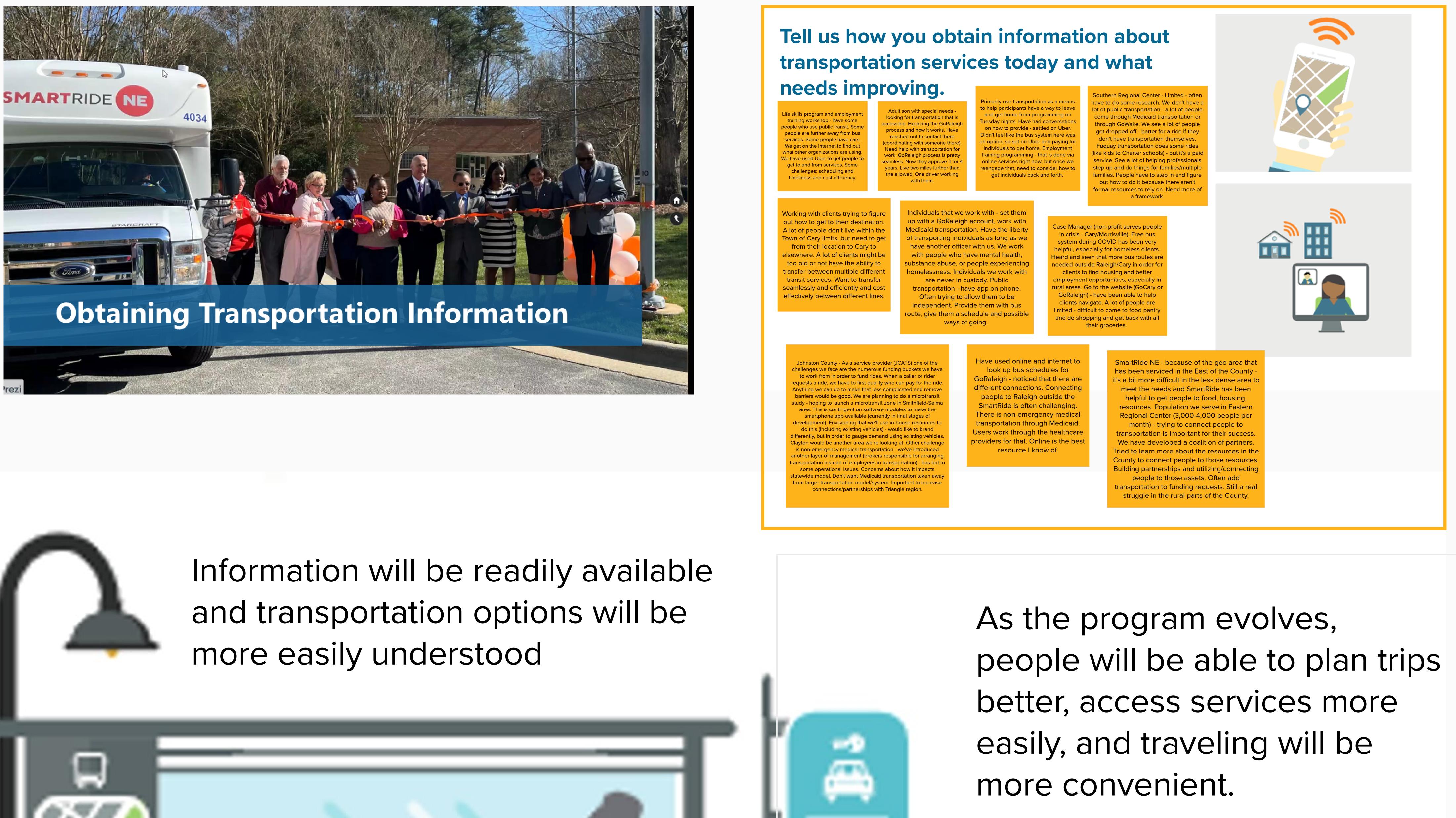
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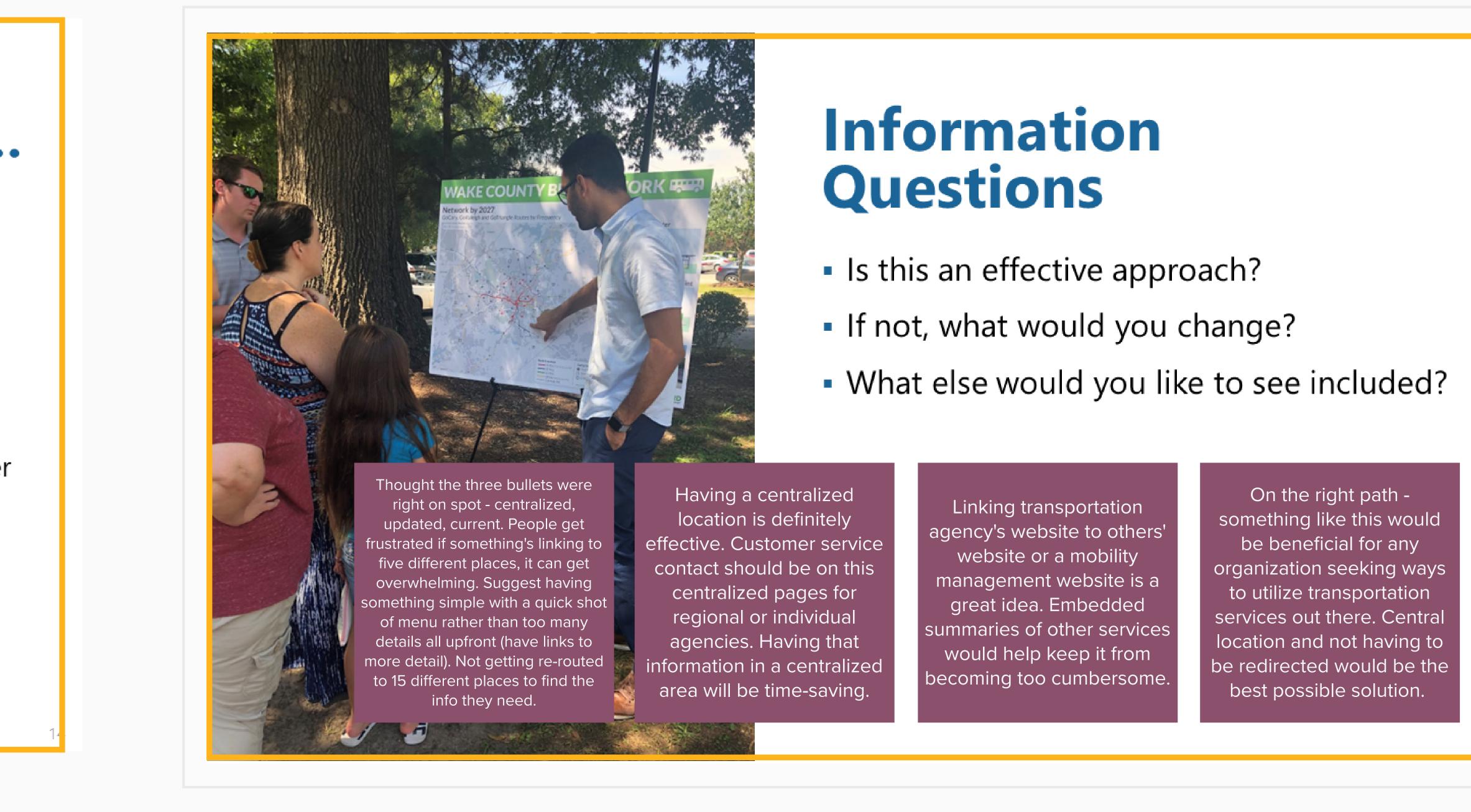
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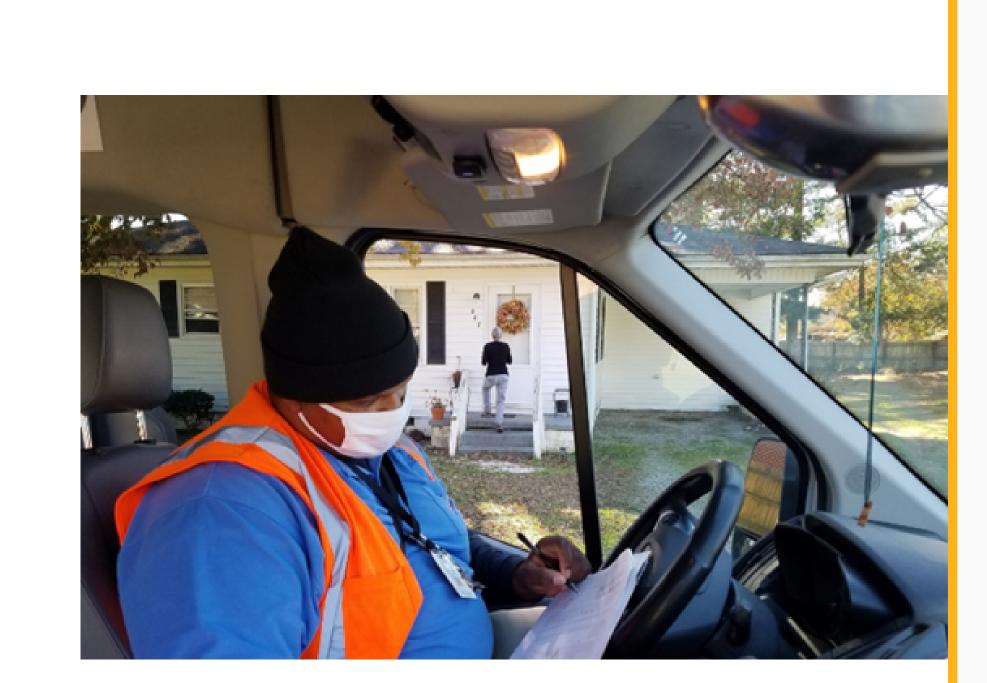
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Final Thoughts

would you see the role of this program be in that?



Mobility Management Focus Group

A conversation about improving regional transportation information and coordination





Introduction



Why Discuss Mobility Management?

- Public transportation options outside our region's fixed-route bus systems are limited and more coverage is needed
- In the more rural parts of our region, it is difficult to sustain regularly scheduled bus service because the demand is comparatively low
- At the same time, available reservation-based transportation services are not well known and those that are available are often constrained
- We believe a program that includes more outreach, consolidated information, and better coordination will make a difference
- We want to discuss these issues with you and seek your help in advancing the region's mobility management program



The Mobility Management primer (sent to all focus group participants) provides an overview of the program currently in development

CAPITAL AREA MOBILITY MANAGEMENT PLAN MOBILITY MANAGEMENT PRIMER

JULY 2022 (rev)

的时代和武器,也不是这些一个中央部署

What Are Key Roles for Mobility Managers?

- According to the National Center for Mobility Management (NCMM), key roles are to:
 - Understand and advocate
 - Convene and facilitate
 - Design and plan
 - Launch and sustain

The National Center for Mobility Management (NCMM) defines some key roles for mobility managers, including:



Understand and Advocate: Mobility managers must have a clear understanding of the audience, or customers, in their respective region. These groups could include current and potential riders, marginalized populations (older adults, individuals with disabilities, low-income households, those for whom English is a second language, etc.), employers, economic development entities, health and human service organizations, and local governments. Mobility managers must be attuned to the various needs, desires, and outcomes these groups are seeking to build a successful practice.



Convene and Facilitate: Mobility managers must be skilled at facilitating discussions, bringing all of the players to the table, and ensuring both stakeholder and public voices are heard through a variety of engagement means.



Design and Plan: Mobility management is built around the premise that solutions are both designed and offered, tailored to the community needs. In practice, mobility managers should offer a variety of solutions that work and yet allow room for new innovations.



Launch and Sustain: Mobility managers should work closely with all service and mobility providers to support new services and mobility options, and customer education of available and new services.

From Mobility Management primer



Mobility Management Vision



Vision for Improvement

A dedicated mobility manager will be hired to coordinate information, programs, and activities.



Vision for Improvement

A key initial goal is to make transportation information readily available and ensure transportation options are better understood.





Information Will Be...

- Comprehensive
 - Includes all available transportation services
 - Explains rules, fares, hours of service, etc.
- Consolidated and Consistent
 - Call one phone number or visit one website to obtain information
 - Websites provide consistent links and customer service staff provide similar guidance/referrals
- Current
 - Information is updated regularly

Vision for Improvement

As the program evolves, people will be able to plan trips better and access services more easily, and traveling will be more convenient.



How Mobility Management Might Help...



ADA Paratransit Riders

- Requesting trips and traveling on existing ADA services would not change
- But a mobility manager would:
 - Be able to provide information and assistance for travel during other times (when ADA paratransit is not running) or to a place where ADA paratransit service is not provided
 - Facilitate travel training for people who wish to learn how to ride the fixedroute bus
 - Compile data and other information on requests, comments, and concerns and share it with other agencies

People with Disabilities

- Not including ADA paratransit, a mobility manager would:
 - Help coordinate travel training on fixed route and other transportation services
 - Understand and work with individuals with different abilities
 - Communicate concerns about accessible infrastructure needs to municipalities and other government agencies
 - Participate in meetings with organizations that advocate for people with disabilities and discuss concerns

Older Adults

- A mobility manager would:
 - Participate in meetings at senior centers and with organizations that advocate for older adults to explain available transportation services for those who retire from driving
 - Organize peer-to-peer training programs to help people learn how to use public transportation
 - Compile data and other information on requests, comments, and concerns and share these with other agencies

People with Low Incomes

- A mobility manager would:
 - Coordinate with health and human services agencies to ensure all available transportation services and eligibility rules are known
 - Identify places where transportation needs are greatest and suggest/advocate for improve service
 - Work to health providers who wish to participate in improving medical appointment attendance by ensuring transportation services are delivered

Volunteers and Advocates

- A mobility manager would:
 - Attend meetings of nonprofit organizations to listen to participants discuss transportation issues
 - Work with interested organizations on developing travel training programs
 - Help spread the word on available services and resources
 - Compile data and other information on requests, comments, and concerns and share these with other agencies



Discussion



Topics of Conversation

- 1. What do you think about the vision for the mobility management program?
- 2. Are we moving in the right direction?
- 3. Is there anything missing?
- 4. What are the best ways to promote mobility management to riders and others?

Final Thoughts



Thank you!

Bill Schwartz, AICP, Nelson\Nygaard bschwartz@nelsonnygaard.com