CAMPO
NC Capital Area Metropolitan Planning Organization

Raleigh™

WAKE COUNTY
NORTH CAROLINA

Town of Cary
NORTH CAROLINA

Mobility Management Implementation Study

Final Report

June 2023

NELSON NYGAARD

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Executive Summary

This report summarizes the Mobility Management[1] Implementation Study (MMIS) completed for the CAMPO region. The study provides a roadmap for implementing a regional mobility management program that aims to address gaps in public transportation, particularly in areas where fixed-route service is limited. When implemented, the program will improve outreach, consolidate transportation information, improve coordination among providers, and ultimately improve the experience of those who need transportation services with an emphasis on elderly and disabled populations

The need for a mobility management program focused on rural areas was a key recommendation of the region's 2018 Updated Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP). A Mobility Coordination Committee (MCC) was charged with implementing recommendations of the 2018 plan. The MCC then recommended engaging a consultant to undertake the MMIS, which commenced late in 2021.

Study Process

CAMPO engaged a team led by Nelson\Nygaard Consulting Associates. A technical steering committee, composed primarily of staff from various regional agencies, provided guidance. The team gathered background information (studies and interviews) and conducted research on mobility management practices and applicable strategies from other regions. The development of the recommended framework included discussions with individual providers and human service agencies to ensure that the program design would support existing operations.

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[1] Mobility management describes programs and services to help people learn about and use transportation services. Mobility managers 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 management programs strive to improve access to transportation for those who need it most.

Program Goals and Recommendations

The mobility management program is organized around three 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 mobility management **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 recommendations are to:

- Create a new position of Regional Mobility Manager to oversee the program

- Establish a work plan that ensures the mobility manager works closely with the region's public transportation providers and meets with other agency staff that work with individuals that need transportation.

- Charge the region's Mobility Coordination Committee (MCC) with providing guidance and support to the mobility manager

- Initially fund the program with federal funds with the local match provided by CAMPO member dues.

Expected Program Benefits

The vision for mobility management describes the expected program benefits:

> 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 on-demand, 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 could 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.

1   INTRODUCTION

The Capital Area Metropolitan Planning Organization (CAMPO), with support from Wake County, the City of Raleigh, and the Town of Cary, commissioned a Mobility Management[2] Implementation Study (MMIS). This final report is the culmination of a nearly two-year process. It includes a roadmap for implementing a regional mobility management program (MMP) to address gaps in public transportation, particularly in rural areas where fixed-route service is limited. The MMP is designed to improve outreach, consolidate transportation information, improve coordination among providers, and ultimately improve the experience of those who need transportation services throughout CAMPO's entire planning area (Wake County and parts of Johnston, Harnett, Franklin, and Granville counties). See Figure 1.

STUDY PROCESS

CAMPO, Wake County, the City of Raleigh, and the Town of Cary sponsored the study and engaged a team led by Nelson\Nygaard Consulting Associates. Additional background on the genesis of the MMIS, project goals, phases and tasks is Appendix A.

Technical Steering Committee (TSC) Coordination

A technical steering committee (TSC) composed of transit agency representatives, county and municipal departments, and others provided guidance throughout the MMIS. Figure 2 lists the agencies represented on the TSC. Most agencies designated 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. The MMIS TSC

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[2] 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.

met six times over the course of the project. Figure 3 lists meeting dates and topics discussed.

Figure 1   CAMPO MMIS Study Area
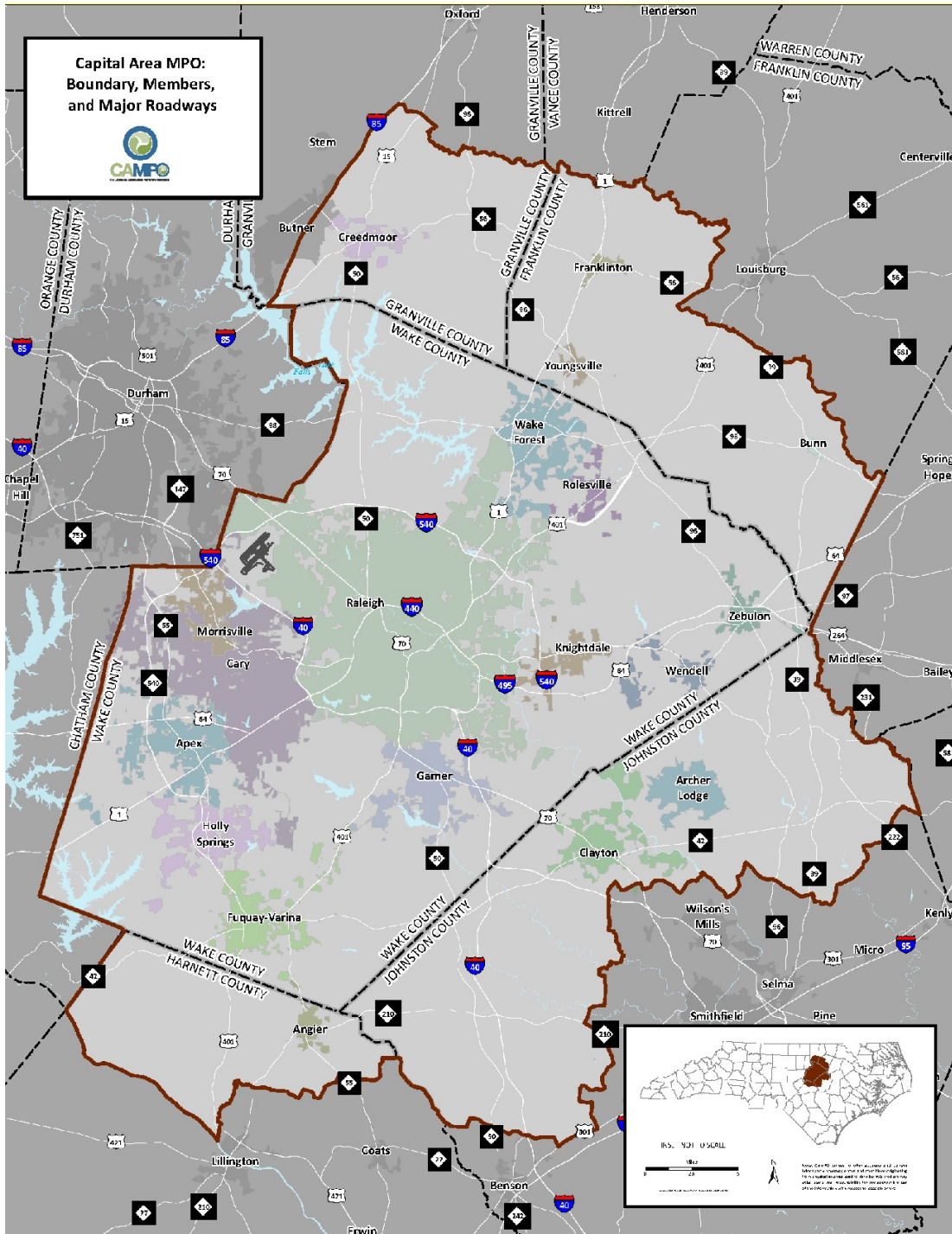
Figure 2   MMIS Technical Steering Committee

TSC Membership			
CAMPO	Johnston County Area Transit (JCATS)	GoTriangle	Eastern Regional Center
GoWake Access/Wake County	Community & Senior Services of Johnston County	Town of Apex	Northern Regional Center
Go Raleigh	Kerr Area Transportation Authority (KARTS)	Community Partnership Network	Southern Regional Center
Town of Cary	Harnett Area Rural Transit System (HARTS)		

Figure 3   TSC Meetings

Meeting Date	Topics Discussed/Areas of Focus
September 2021*	Project team and TSC member introductions, project overview
October 2021*	Working session to review foundational tasks 2 and 3 and discuss presentations and engagement for Task 4. Also discussed peer review regions.
January 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 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 2022	Held an in-person meeting to review, discuss and concur with the draft MMIS implementation framework.
May 2023*	Implementation plan review and approval

* Meetings held virtually

Plan Development Process

The TSC provided overall study guidance. The process of developing program recommendations was iterative, and included:

- Compilation of prior studies to document applicable programs, services, and recommendations (existing and planned)
- Individual interviews with transportation providers, human service agency staff, and nonprofit organization leaders to document challenges and opportunities
- Research into mobility management practices in other regions to identify best practices, lessons learned, and strategies applicable to the CAMPO region

- Presentations to boards, committees, and other leaders at different times in the process to publicize the study and seek feedback
- Focus groups with public transportation riders, caregivers, transportation providers, and advocates to seek feedback on program priorities
- Additional interviews with transportation providers to document ways to operationalize the program

Summaries of external presentations, focus groups, and transit provider follow-up meetings are included in Appendix B. As noted, the development of the implementation plan was iterative, informed by interviews, review of reports, research, and outreach with guidance provided by the TSC. Figure 4 lists these activities in chronological order noting information gathered and/or topics discussed along with some key takeaways.

Figure 4   MMIS Activities, Topics, and Key Takeaways Supporting Implementation Plan Development

Activity	Timeframe	Topics	Key Takeaways*
Review of Published Studies	Fall 2021	▪ Planned projects ▪ Funding ▪ Operational data ▪ Regional growth	▪ Need for technology strategy ▪ Increase in people living in areas with less transit service
Staff Interviews	Fall 2021, Winter 2021-2022	▪ Service description ▪ Coordination needs ▪ Operational challenges	▪ Questions about operations impacts ▪ Strong interest in coordinating trips ▪ Include human services agencies
Board Presentations (Round 1)	Winter 2022	▪ Study overview presentations	▪ General support for the study ▪ Recommendation to conduct focus groups with riders ▪ See Appendix B
Peer Research on Best Practices and Applicable Strategies	March 2022	Regions included: ▪ Austin, Texas ▪ Columbus, Ohio ▪ Denver, Colorado ▪ Nashville, Tennessee ▪ San Francisco, California ▪ Charlotte, North Carolina	▪ 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 ▪ See Appendix C
TSC Workshop for Implementation Framework Design	April 2022	▪ Program goals ▪ Success measures ▪ Concerns	▪ Consolidate information into a "one-stop shop" ▪ All providers should participate ▪ MCC should continue to provide guidance ▪ FTA Section 5310 funding can be used to support the program
Provider Focus Group	July 2022	▪ Transit information access issues ▪ Program vision, goals, and priorities	▪ Centralized, current information important ▪ Connect agency websites to MM program (links) ▪ Understand rider's point of view ▪ See Appendix B

Activity	Timeframe	Topics	Key Takeaways*
Rider Focus Group	August 2022	▪ Current information challenges ▪ Program vision, goals, and priorities	▪ Ensure websites are fully accessible ▪ Work with social service agencies and faith organizations ▪ Travel training resources exist (ADA-NC) ▪ Include residents in rural areas in outreach ▪ See Appendix B
TSC Framework Review Workshop	October 2022	▪ Review draft program framework ▪ Provide feedback on website, mobility manager (MM) position, funding ▪ Provide agency staff feedback /concurrence on the initial program framework and recommendations ▪ Agency staff concurrence to seek leadership framework and recommendations endorsement	▪ Support for using 5310 funds to hire a mobility manager ▪ Recommend a webpage (not a new website) with links from provider websites ▪ Future coordination with regional trip planner team (GoTriangle) needed ▪ CAMPO can be administratively responsible for the MM position, but he/she should spend time at providers' offices to build rapport with operations staff, customer service teams, planners, etc. ▪ MM should be spending as much time as warranted reaching out to organizations, partners, potential clients, etc. ▪ MM needs to capture the reasons why it is difficult for users to get to the locations that they are trying to reach with existing options for future priorities.
Draft White Paper on Recommended Mobility Management Framework	December 2022	▪ Study background and process ▪ MMP vision, elements, goals, actions, phasing, and transit agency considerations ▪ Implementation framework and discussion of strategies ▪ Draft participation commitment language	▪ TSC overall supported framework ▪ Clarification sought on funding needs ▪ Additional provider input needed to clarify MM time allocation and ways to coordinate

Activity	Timeframe	Topics	Key Takeaways*
Board Presentations (Round 2)	Winter 2023	▪ Proposed framework with funding, role, activities ▪ Requests for endorsement	▪ Support for proposed framework obtained from all agency partners
Transit Agency Follow-up Interviews	March 2023	▪ Update current and planned services ▪ Discuss capital projects, technology, and pilot programs ▪ Ongoing challenges and needs ▪ Goals for MM accomplishments (different timeframes) ▪ General concerns ▪ Agency point of contact	▪ MM should fully understand all transportation services ▪ Regional trip coordination and transfers is a priority for rural providers ▪ MM should collaborate with GoTriangle trip planner team ▪ MM should understand and track different scheduling and dispatching software being used ▪ Partnerships should extend to municipalities, NC DOT, and other agencies such as Triangle J ▪ Travel training should include explaining eligibility rules to new riders ▪ See Appendix B

2 MOBILITY MANAGEMENT PROGRAM OVERVIEW

This chapter presents an overview of the recommended mobility management program for the CAMPO region, including a vision for the program, and description of program elements, goals, actions, and phasing.

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 will be centralized within a single agency. For program administration purposes, CAMPO will administer the program and hire the mobility manager. See mobility manager job description (Appendix F) and recommended work program (Appendix G).
- Initially, one full-time employee will be hired as a regional mobility manager and provided with office space and equipment, comparable to other CAMPO staff.

- While the regional mobility manager will be employed by CAMPO, they will spend some of their in-office time rotating among the provider agencies and/or their operating contractors (GoCary, GoRaleigh, GoWake Access, GoTriangle, GoApex, HARTS, JCATS, and KARTS) 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.

- Through a memorandum of understanding (MOU), participating entities (primarily public transportation providers) will commit to the overall program goals, including designating and maintaining an agency point of contact, regularly meeting with mobility management staff, supporting regional public transportation coordination, and supporting ongoing program funding (primarily through CAMPO dues).

- Coordination with human service agencies whose clients rely on public transportation will be primarily through existing programs and providers, primarily through the MCC and its partners. As the program evolves and more entities participate and as needs are identified, additional outreach and coordination activities should be considered.

- The Mobility Coordination Committee (MCC) will serve as the steering committee for the MMP. The MCC will regularly meet to review implementation progress and provide feedback, direction, and guidance to mobility management staff. Because the MCC is currently an informal committee, it should develop and adopt bylaws and procedures for voting on potential policies. Sample agency coordination bylaws are included in Appendix E.

- The MMP will 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 will 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. Data should be compiled, analyzed, and reported every six months.

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 mobility management **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.

- A formalized MCC, operating under bylaws, will 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.)

- Implement the communications and outreach strategy aimed at building partnerships with providers and others and marketing available mobility management services. (See Public Outreach & Marketing Strategy chapter.)

- Collaborate 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 the full 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 future CPT-HSTP recommendations.

- Determine the longer-term potential for trip sharing, especially among rural providers, including the potential of technology to facilitate it.

Supporting text explaining the basis for recommendations for the plan development is provided in Appendix D, covering organization structure and

location, governance, staffing, support, and equipment, and funding and budget. Some of the text has been revised for consistency with final recommendations.

PROGRAM PHASING

The MMP is expected to evolve in three phases over approximately five years. Figure 5 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. Similarly, activities envisioned for later years, such as technology integration, will require ongoing conversations and coordination.

Figure 5   MMIS Implementation Phases

START UP & ROLL OUT
- Information gathering, publication, and sharing
- Partnership building and community outreach
- Assistance to individuals and partners

REFINEMENT & EXPANSION
- Expanded assistance to individuals and partners
- Support for coordinated transportation planning
- Evaluation of program metrics and investments

TECHNOLOGY INTEGRATION & TRIP COORDINATION
- Increased provider collaboration and trip sharing*
- Technology investments and integration
- Realization of cost efficiencies

YEARS 1-2   YEARS 3-4   YEAR 5+

* As applicable; provider operations would remain independent

3 IMPLEMENTATION PLAN

This chapter presents the mobility management implementation plan. The framework is organized into specific goals and actions. See Figure 6. Priority strategies are noted. High-level explanatory notes are provided along with specific strategy steps, timeframe, and suggested measures to be used to track progress with additional supporting narrative in Appendix D.

The implementation plan reflects updates to actions based on feedback received during follow-up one-on-one meetings with transit providers as follows:

- Partner outreach emphasizes the importance of the mobility manager spending time at provider locations based on an agreed-upon schedule.
- Development of public-facing materials notes the public need for better awareness of mobility management and that outreach should be targeted accordingly.
- Consistently collected data is needed to track transportation needs
- Mobility management webpage development should be done in conjunction with other agencies' communications protocols and websites.
- The technology strategy includes collaboration on trip planner and scheduling software, including microtransit.
- Identifying opportunities for trip coordination is a new strategy
- Coordination should also involve North Caroline DOT, municipalities, and other agencies such as Triangle J.

Figure 6   Mobility Management Program (MMP) Goals and Actions

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination *Priority Strategy*	**Conduct partner outreach, including site visits with providers**	▪ To be effective, ongoing participation of all public transportation providers is critical to program success. ▪ 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 ▪ MM staff must demonstrate to providers and governing bodies the value of continued engagement with the MMP	▪ Using information obtained during one-on-one provider follow-up conversations, confirm each agency's MMP liaison ▪ Establish a schedule for regular and recurring visits to provider offices and/or contractor facilities ▪ Confirm other potential partners and interested parties and establish schedule for outreach activities ▪ Develop a schedule for periodic check-ins ▪ Participate in partner events as appropriate ▪ See Public Outreach & Marketing Strategy	▪ 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 *Priority Strategy*	**Develop mobility management identity and brand**	▪ Low awareness and understanding of MM ▪ Brand will help build awareness and support ▪ GoForward brand is widely adopted for fixed route and complementary paratransit (ADA) but not for demand-response ▪ Other 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 ▪ See Public Outreach & Marketing Strategy	▪ 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** *Priority Strategy*	▪ Outreach for MMIS has included initial materials ▪ Increased awareness is needed, particularly for entities other than providers ▪ 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 Public Outreach & Marketing Strategy	▪ Year 1 (end); revise as needed	▪ Materials produced and distributed and/or downloaded
Engagement, Outreach, and Coordination	**Conduct targeted outreach** *Priority Strategy*	▪ Providers, affiliates, and sponsoring agencies are aware of the MM program ▪ External outreach will help to expand awareness and form ongoing relationships ▪ Ongoing outreach is a best practice	▪ Work with providers to 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 Public Outreach & Marketing Strategy	▪ Year 1 ▪ Ongoing	▪ Meetings held and events attended ▪ Number of participants ▪ Feedback received on program effectiveness and recommendations for program modifications
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 such as the forthcoming coordinated plan update (subject to time availability)	▪ Year 2 (launch) ▪ Ongoing	▪ Meetings attended ▪ Committees joined ▪ Notes

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination	**Develop and maintain transportation services information and database** *Priority Strategy*	▪ 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 ▪ See Improving Access to Information in Appendix D.	▪ Develop electronic resource (spreadsheet or database) listing all available service characteristics with a focus on demand-response ▪ Coordinate with providers to regularly share information updates ▪ Work with each CAMPO area provider to identify methods for customer interactions regarding available services in the region ▪ Publish information as a downloadable document ▪ See Public Outreach & Marketing Strategy	▪ 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
Education, Outreach, and Coordination	**Design, launch, and maintain mobility management webpage**	▪ Peer local/regional MM programs have dedicated websites (see DRMAC's Getting There Guide) ▪ 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.	▪ Determine who will host dedicated webpage ▪ Develop content and links ▪ Work with providers to confirm messaging for directing visitors to MM webpage from their provider websites ▪ See Public Outreach & Marketing Strategy	▪ Year 1 (end): complete: basic landing page describing program ▪ Year 2 (end): launch webpage ▪ Revise annually	▪ Publication of site ▪ Visitors ▪ Document downloads, including directory

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Education, Outreach, and Coordination	**Refer riders to transportation options**	▪ Some MM programs make direct transportation referrals. 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 ▪ Work with individual providers to identify best ways to support referral process ▪ Develop communications protocols for describing ways MM program can assist and publish on MM webpage	▪ Year 1: begin referrals ▪ Ongoing	▪ Agency and organization contacts ▪ Approach to addressing inquiries and tracking requests ▪ Solutions not found
Education, Outreach, and Coordination	**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, including Alliance of Disability Advocates ▪ 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

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 ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ 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	▪ 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)
Data Collection, Needs Assessment, and Program Design	**Identify opportunities for trip coordination**	▪ The region's rural area providers provide transportation service to clients traveling to regional medical centers and other city destinations and wish to identify ways to facilitate transfers to other providers' vehicles when services overlap ▪ To coordinate such trips, better information is needed on which providers have capacity and could possibly fulfil the trip request, potentially through data exchanges ▪ Convenient locations need to be identified where vehicles can meet and where riders can transfer	▪ Work with rural providers (HARTS, JCATS, KARTS, GoWake Access) to map common destinations, service schedules, funding programs, etc. ▪ Quantify extent of demand for overlapping service ▪ Document opportunities and constraints for trip sharing including program rules ▪ As applicable, identify locations for potential transfers ▪ Work to identify potential pilot program	▪ Year 2	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
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 ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ Identify priority boards and committees for initial and follow-up outreach ▪ Attend meetings in person and collect feedback	▪ Priority 1 ▪ Ongoing	▪ Meetings attended with basic summaries ▪ Comments received and actions taken
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 ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ 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	▪ Every 6 months	▪ Include narratives of client and partner interactions ▪ See other strategy measures
Program Evaluation and Refinement	**Participate in 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 Easter 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	▪ Conferences attended ▪ Contacts identified ▪ Progress toward certification (credit hours completed ▪ Maintenance of certification

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Program Evaluation and Refinement	**Provide technology assistance and related 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 regional transit technology study did not fully consider demand-response transportation, including microtransit.	- Track adoption of scheduling and dispatching software, microtransit booking applications, and other trip planning tools - Coordinate with GoTriangle (lead agency for regional trip planner) - Participate in ongoing regional transportation technology discussions - Understand how users are learning about services - Advocate for including all demand-response services in technology integration efforts - Identify opportunities for technology integration pilot for potential trip sharing	Year 3+	- Document technology challenges raised during outreach and coordination, including meetings attended - Track relevant technology evolution and use

4 PUBLIC OUTREACH & MARKETING STRATEGY

Outreach and marketing is a critical element of mobility management. When implemented, the outreach and marketing framework presented in this chapter will help achieve the overall program vision: to improve access to public transportation services for those who need it most—particularly in rural areas—by making it easier to learn about and use available services. The mobility manager, with support from the MCC, will be responsible for outreach and engagement activities, including identifying and working with target audiences, developing and implementing a communications strategy, and compiling information and feedback that supports program growth. As with other mobility management activities, this strategy will likely evolve, and priorities should be revisited at least annually.

OUTREACH GOALS

The main outreach goals for the MMP are to:

- Promote mobility management, increasing program awareness
- Communicate information on available public transportation services and compile information, data, and feedback
- Achieve program growth (riders, partners) and sustainability (funding, board support)

TARGET AUDIENCES

The key target audiences for program outreach are:

- Riders: current riders, potential riders, caregivers, etc.
- Providers: transit agencies and their contractors (both fixed-route and demand-response), other public providers, private providers, and mobility managers in the region
- Government: county and municipal leaders, staff who work with riders and providers

- Others: nonprofit organizations, employers, medical providers, universities, etc.

ENGAGEMENT ACTIVITIES

Outreach and engagement activities are organized into meetings, information sharing, and data compilation. Additional details on specific steps are also included in the implementation framework (see Figure 6).

Meetings

As noted, the four target audiences include riders, providers, government, and others. Activities would take place via:

- Ongoing collaboration with provider staff
- Participation in committee meetings
- Presentations to governing boards
- Outreach at hosted events
- Targeted meetings with interested agencies, businesses, and organizations

This will involve:

- Working with providers to identify priority groups for outreach and input
- Confirming boards and committees for initial and follow-up outreach
- Confirming other potential partners and interested parties and establishing a schedule for outreach activities
- Participating in partner events as appropriate
- Attending meetings and collecting feedback

Information Sharing

The mobility manager will be responsible for developing content for use at meetings, for publicity, and for growing the program. This will involve:

- Leading development of the program brand and identity
- Developing content for, launching, and managing mobility management webpage
- Compiling and managing a directory of all available transportation services and eligibility rules
- Producing and distributing printed and electronic materials (presentation slides, posters, monitor content, handouts, business cards)

- Drafting and disseminating an email newsletter
- Promoting mobility management on social media

See discussion of program materials below.

Data Compilation

The mobility manager will seek input and feedback and collect data by:

- Having conversations with riders, providers, agency staff, and others
- Seeking, documenting, and sharing summarized feedback received
- Conducting periodic surveys on program activities to inform improvements
- Developing, disseminating, and using forms to track requests (e.g., specific trips, travel training, and other assistance)

PROGRAM MATERIALS

Program materials include a brand and identify, printed materials, and electronic communications, as described below. Additional marketing guidance is available from the National RTAP (Rural Transit Assistance Program's marketing toolkit.[3]

Mobility Management Brand and Identity

Development of a mobility management identity and brand is a priority strategy. This includes a logo, color palates, and fonts for use in all materials to be developed with input from the MCC. Figure 7 shows how the Denver region's DRMAC uses its brand to promote a travel training course.

Printed Materials

Printed materials include posters for placement in public places where riders and others can learn about the program such as on bulletin boards or

Figure 7: Brand Integration in Promotional Content

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[3] See https://www.nationalrtap.org/Toolkits/Marketing-Toolkit/Welcomeform

in transit vehicles. Flyers can be developed as meeting handouts. Business cards that include an email address and a QR code for the program website should be created at the appropriate time and handed out to interested individuals. A sample poster for placement in a public building is shown in Figure 8.

Figure 8   Sample Mobility Management Poster

A sample handout for elected officials or agency boards is shown in in Figure 9. Text explaining the program to members of the public and to external organizations plus contact information is shown in Figure 10. The alternative text would replace the narrative shown on the agency board example beneath the large blue text box.

Figure 9   Sample Mobility Management Handout for Elected Officials and Board Members

Capital Area Mobility Management Program

SAMPLE HANDOUT

Helping people connect to public transportation options

The Capital Area mobility management program is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities.

The program was launched in 2023 with funding from the Federal Transit Administration with local matching funds provided by CAMPO members. We work with transit agencies, external partners such as government agencies, nonprofit organizations, employers, and healthcare providers to:

- Help riders better connect to and use public transportation services.
- Streamline the process of finding travel options where fixed-route transit is not available.
- Provide more services to and advocate for older adults, people with disabilities, and people with low incomes.
- Increase the availability of travel training for those who need it.
- Through improved coordination, share trips among providers to increase efficiency.
- Offer better technology options to enhance the user experience.

The CAMPO Mobility Coordination Committee provides overall program guidance to the mobility manager. For mor information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit:

URL PLACEHOLDER

QR CODE

Figure 10 Draft Narrative for Handouts to Boards, Riders, and External Organizations

Board Handout (See Figure 9)	Riders (Alternative Text)	External (Alternative Text)
The Capital Area mobility management program is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities. The program was launched in 2023 with funding from the Federal Transit Administration with local matching funds provided by CAMPO members. We work with transit agencies, external partners such as government agencies, nonprofit organizations, employers, and healthcare providers to: ▪ Help riders better connect to and use public transportation services. ▪ Streamline the process of finding travel options where fixed-route transit is not available. ▪ Provide more services to and advocate for older adults, people with disabilities, and people with low incomes. ▪ Increase the availability of travel training for those who need it. ▪ Through improved coordination, share trips among providers to increase efficiency. ▪ Offer better technology options to enhance the user experience.	The Capital Area mobility management program helps to improve public transportation services throughout the region, particularly our rural areas. If you or someone you know needs transportation, we're here to help explain what's available, who is eligible, and how to use public transportation.	The Capital Area mobility management program, funded through the Capital Area Metropolitan Planning Organization (CAMPO), is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities. We work with partners such as government agencies, nonprofit organizations, employers, and healthcare providers to: ▪ Help riders better connect to and use public transportation services. ▪ Streamline the process of finding travel options where fixed-route transit is not available. ▪ Provide more services to and advocate for older adults, people with disabilities, and people with low incomes. ▪ Increase the availability of travel training for those who need it. ▪ Work to improve coordination and enhance the user experience.
The CAMPO Mobility Coordination Committee provides overall program guidance to the mobility manager. For mor information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit:	For more information, visit: https://www.campo-nc.us	For more information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit

Electronic Communications

Webpage

A mobility management webpage will enable visitors to learn about the program, download available information (e.g., directory of services), contact the mobility manager, and link to other public transportation resources. Once fully developed, each transportation agency partner should include information on the program and provide links to the webpage. Published content should reflect staff capacity to respond to inquiries and maintain information.

Slide Deck and Promotional Slide

Using a template based on the brand and identity, a PowerPoint presentation deck can be used for engagement or for promotion. The promotional slide might be displayed on a public building monitor or on a local cable channel. See Figure 11 for an example.

Figure 11 Example Promotional Slide for Television or Building Monitors

Email Newsletter

A periodic email newsletter, with the integrated brand is an effective way to communicate with stakeholders. The newsletter should primarily target government partners and other organizations, along with the participating providers and other interested parties. It is expected that the first newsletter should be disseminated

approximately six months into the program launch, and then shared at least twice per year at approximately six-month intervals. It is suggested that email marketing tools be used to measure how many individuals open and/or forward the newsletter to others.

Figure 12 Sample Mobility Management Newsletter Content
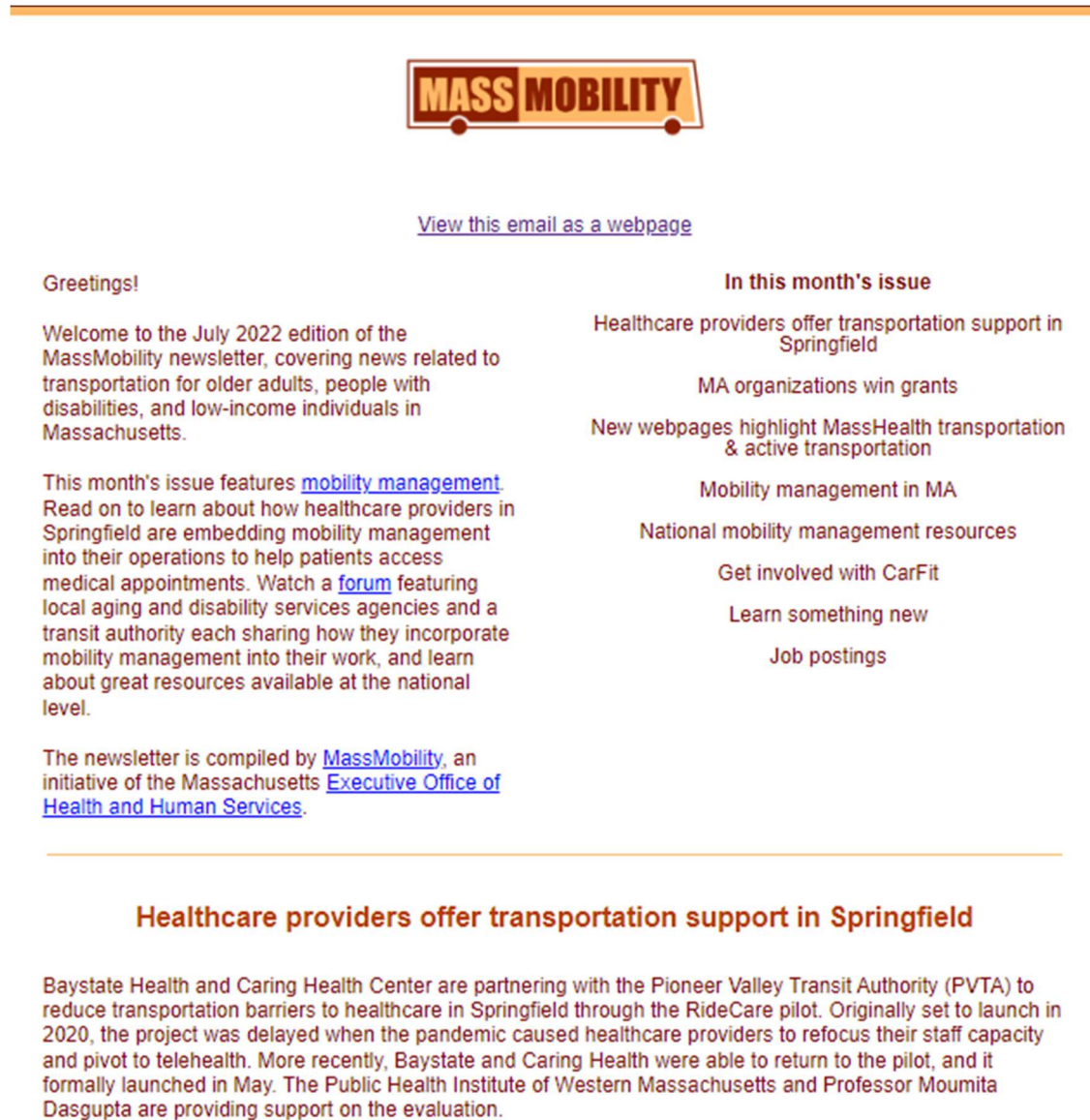
Source: Commonwealth of Massachusetts

Additional Guidance

Additional guidance on collateral resources and marketing is available through the FTA-sponsored National Rural Transit Assistance Program (RTAP).[4]

POINTS OF CONTACT

Figure 13 lists the contact names and email addresses of the primary points of contact as well as any additional points contact at each transportation provider agency.

Figure 13 Transportation Provider Points of Contact (as of May 2023)

Provider	Name	Email	Other contacts
GoCary	TeLeishia Holloway, Transp. Program Coordinator	teleishia.holloway@carync.gov	Kevin Wyrauch and Kelly Blazey (planning) Fabian Rodriquez (outreach)
GoRaleigh	Sean Abrams, Sr. Trans Analyst	Sean.abrams@raleighnc.gov	David Walker (planning)
GoWake Access	Anita Davis, Transportation Program Manager	Anita.Davis@wake.gov	Nikki Abija (Transportation Planner)
GoTriangle	James Carter, Transit Service Manager	jcarter@gotriangle.org	Austin Stanion, Service Planning Manager, Tammy Romain, Paratransit Manager, Shelly Parker, Sustainable Travel Services Manager (employers), Michelle Peele, Wake Transit Manage Include communications team for marketing and outreach activities
JCATS	Neal Davis, Exe. Dir	Neal@jcats.org	
HARTS	Barry Blevins, Director of General Services	Bblevins@harnett.org	Chance Torain (Transit Operations)
KARTS	Mary Young (Interim Executive Director)	Director@kartsnc.com	Alison Pegram (Transportation Coordinator)
Town of Apex	Katie Schwing, Senior Planner, Long Range Transit	Katie.Schwing@apexnc.org	Shannon Cox, Long-Range Planning Manager,

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[4] See https://www.nationalrtap.org/Toolkits/Marketing-Toolkit/Welcome.

APPENDIX A: STUDY BACKGROUND

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 works 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. Developing the program including the addition of a mobility manager, if warranted, can be used to help assist the Mobility Coordination Committee (MCC) (made up of various agency staff and stakeholders) implement the plan's 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 more 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 as oversight of the program and 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.

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.

MOBILITY COORDINATION COMMITTEE (MCC)

The Mobility Coordination Committee (MCC), 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 of the plan are presented in three implementation tiers: short-, medium-, and longer-term timeframes. (CPT-HSTP, Section 6).

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 included two phases. Phase I explored the readiness, options, and foundation for a mobility management program. Phase II refined the implementation strategy for participating agencies. See Figure 14 MMIS Tasks

Figure 14 MMIS Tasks

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

APPENDIX B: STUDY OUTREACH ACTIVITIES & INPUT RECEIVED

This appendix includes information on presentations to governing bodies and others, focus groups undertaken, and the input received during transit provider follow-up meetings.

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 15 lists the organizations and meeting dates. The team provided materials but did not meet with the Wake Transit Policy Advisory Committee (TPAC). Generally, leadership was excited about the agencies working together on a regional program and supportive of learning more about mobility management, expectations for the program and any associated program costs. In the winter of 2023, the mobility management plan framework was presented to the governing bodies. See Figure 15.

Figure 15   Board and Committee Presentations

Organization	Presentation Date
Introductory Meetings	
JCATS Transportation Advisory Board (TAB)	2/10/22
GoWake Access TAB	2/10/22
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
Plan Framework Presentations	
JCATS Transportation Advisory Board (TAB)	1/2023
GoWake Access TAB	2/1/23

Organization	Presentation Date
GoRaleigh RTA Board of Directors	2/9/23
Harnett County Board of Commissioners	2/14/23
KARTS Executive Board/TAB	2/21/23
GoCary Transportation Working Group	2/21/23
CAMPO Technical Coordinating Committee (TCC)	3/2/23
CAMPO Executive Board	3/15/23

FOCUS GROUPS

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 resources first
3. Outreach – how to promote the program to riders and others

Figure 16   Provider/Helper Focus Group Sample Whiteboard Slide
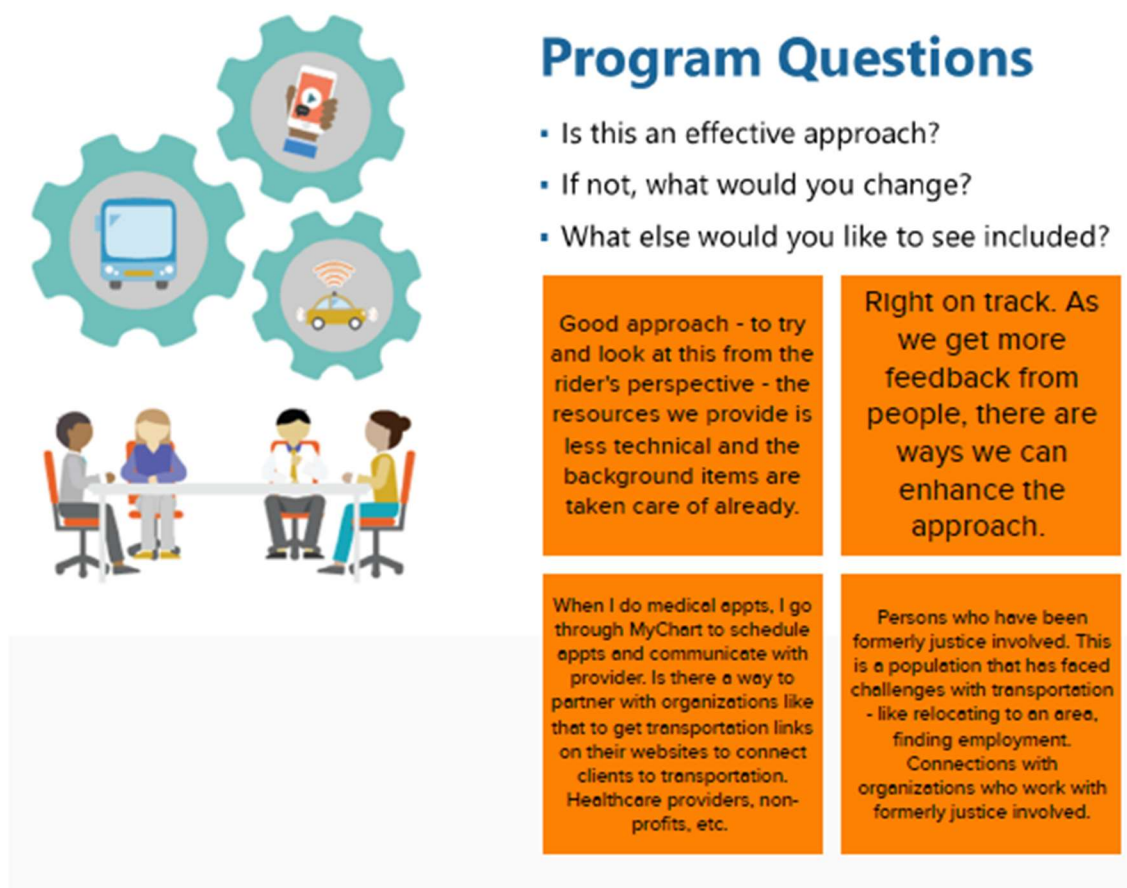
Rider Focus Group

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 resources first
3. Outreach – how to promote the program to riders and others

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

TRANSIT PROVIDER FOLLOW-UP MEETINGS

In March 2023, as part of Task 10 (Participants' Operational Review, Analysis, & Recommendations), the project team conducted one-on-one conversations with the region's transit providers (GoTriangle (including TJCOG/TDM), GoRaleigh, GoCary, GoWake Access, GoApex, HARTS, JCATS, and KARTS).

These discussions covered current and planned services, capital projects, technology, pilot programs, and ongoing agency challenges, needs, and concerns. Each provider designated primary and secondary points of contact for coordination with the mobility manager. Participants answered project team questions about the mobility management program (immediate goals, desired outcomes by the end of the program's second year). Some participants asked additional questions or shared ideas.

Key Themes and Considerations

Some regionally applicable themes and applicable considerations, summarized below, identify important areas of focus as the mobility management program is implemented. Applicable action items for the mobility manager are also included for each theme.

Transportation Information Management

A common theme is the importance for the mobility manager to fully understand the different available services. In addition, reporting is needed on tracking unfulfilled trip requests including reasons (e.g., no service available at that time, capacity, area not served, rider not eligible, etc.). Having good data and associated reporting can lead to more dedicated funding.

Mobility Manager Action Items

- Become familiar with all available services and track any changes in schedules, fares, eligibility, etc.
- Develop, share, and maintain consistent reporting tools.

Regional Trip Coordination and Transfers

For providers whose customers wish to travel to locations outside of their service areas, the complexity of making transfers, constraints on service capacity, and long trip lengths present ongoing challenges. This is particularly an issue for medical appointments in Raleigh as well as in Durham and Chapel Hill. It will be important to identify and track the demand for such trips and to design ways to share trip requests with other providers. If transfers become part of the journey, designated transfer points will be needed.

Operations managers from each agency will need to work together to identify where and when this is feasible.

Mobility Manager Action Items

- Develop consistent forms for tracking regional trips requiring more than one provider and/or not served by any provider.
- Analyze travel patterns and trip routes to identify possible transfer locations.

Trip Planning Resources

GoTriangle manages the regional fixed-route trip planner, the same planner available through GoCary, GoRaleigh, and GoDurham. Information on the GoApex's ACX route is available since it is operated by GoCary's contractor. Trip planning information is not available for the multiple demand-response services (including microtransit). More work will be needed to try to integrate other mobility services into trip planning, whether through the existing GoTriangle-managed planner or new resources.

Mobility Manager Action Items

- Collaborate with GoTriangle and other agencies in any trip planner resource improvements.
- Track and report on other technology improvements as they develop.

Software Compatibility

Demand-response transportation providers in the region use different software for scheduling and dispatching, including for microtransit, and some are working to integrate new software tools. While it is not necessary for all providers to be on the same platform, the ability to communicate with other applications to exchange schedules, potential vehicle locations, and trip requests is an important longer-term goal. As the mobility manager becomes more familiar with each agency's operations, it will be important to identify opportunities for data exchange.

Mobility Manager Action Items

- Become familiar with scheduling and dispatching software used by each provider as well as for microtransit services.
- Track any plans to upgrade/replace software.

Additional Partnerships and Coordination

Since some of the demand for travel extends beyond the CAMPO region, it will be helpful to also coordinate with agency partners such as the Durham-Chapel Hill-Carrboro MPO, North Carolina DOT, and Triangle J, among others.

It is also important to include municipalities regardless of whether transit service is available in those communities. This includes the Community Funding Areas (CFAs) in Wake County as well as smaller cities throughout the CAMPO region such as Anger (HARTS) and Clayton (JCATS).

Mobility Manager Action Items

- Periodically coordinate with other regional or state agencies to understand their programs.
- Establish and maintain relationships with municipalities, particularly those considering future transit services.

Travel Training

Educating new riders on how to use available services is important. This includes understanding eligibility rules. It also includes training individuals on how to transfer to and/or ride fixed-route service where applicable.

Mobility Manager Action Items

- Identify existing travel training programs in the region, such as those developed by the Alliance of Disability Advocates to learn about program delivery.
- Work with individual providers to identify specific travel training needs.

Detailed notes from each provider meeting are presented on the following pages.

GOTRIANGLE

Operations Considerations

Points of Contact

- Primary: James Carter, Transit Service Planner
- Others: Austin Stanion, Service Planning Manager, Tammy Romain, Paratransit Manager, Michelle "Shelly" Parker, Sustainable Travel Services Manager/TDM (employers), Michelle Peele, Wake Transit Manager, Shuchi Gupta, Triangle JCOG, Include communications team for marketing and outreach activities

Service Notes

Fixed Route

- Directly operated service
- As a regional provider, responsible for transit service throughout Triangle region, which extends beyond CAMPO Study Area

Demand Response

- Directly operated service
- GoTriangle Access: complementary paratransit (ADA) provided for GoTriangle's all-day routes
- Accepts trip requests for ADA paratransit eligible riders from GoRaleigh and GoCary (also Durham and Chapel Hill)
- For ADA riders traveling regionally (e.g., between Raleigh and Durham), through seamless agreement, GoTriangle will provide the full trip and invoice local provider; eliminates need for rider transfer and coordination
- Riders generally know to call GoTriangle Access to reserve the regional trip

Location

- Operations and Administration: 4600 Emperor Boulevard, Durham

Scheduling and Dispatching Software

- Trapeze PASS

Trip Planner

- GoTriangle manages the trip planner for the entire region
- Currently provides information on fixed-route service only; other services not described, and websites do not provide any suggestions on contacts for more information
- For TDM, GoTriangle is investigating working with Umo app, a multimodal trip planner
- Not aware of an ongoing transit provider technology working group to investigate new software options
- Austin Stanion is point of contact for future trip planning and transit technology topics

Other Notes

- Triangle J Council of Governments coordinates reginal transportation demand management (TDM) programs, including with GoTriangle
  - Shuchi Gupta, Senior Planner/TDM Coordinator is point of contact
  - Important to integrate TDM into MM program by meeting periodically, identifying potential program overlaps, investigating joint marketing opportunities, and maintaining ongoing communications
- Growing interest in local on-demand transportation (e.g., microtransit) leading to multiple services and providers; important to track and coordinate
- Engagement with NCDOT important

Goals and Expectations

- Interest in seeing similar mobility management activities in Durham-Chapel Hill-Carrboro and for interregional coordination

GORALEIGH

Operations Considerations

Points of Contact

- Primary: Sean Abrams, Senior Transportation Analyst, Byanka Pierce, Customer Service Rep
- Planning: David Walker

Service Notes

- Contracted fixed-route service – RATP Dev – new contractors
- Contracted complementary paratransit (ADA) GoRaleigh Access: RATP Dev – new contractor; combined with GoWake Access
- Service changes funded by Wake Transit Plan are increases in frequencies, changes to routes, alignment changes, serving same general area - not a change to service area

Location

- GoRaleigh Access Operations: 1430 South Blount Street, Raleigh

- Admin: no city staff located at Access facility, but some transit admin staff will work in the new facility
- Future combined paratransit center (with GoWake Access) will include space for more administrative staff; funded through Wake Transit Plan; in negotiations for land purchase; expected

Scheduling and Dispatching Software

- New vendor recently selected

Trip Planner

- Same as GoTriangle

Other Notes

- Coordinate with Mayor's Committee for Persons with Disabilities

Goals and Expectations

- To ensure the MM fully understands the different services
- While no travel training programs are in place, it may be beneficial to consider it to encourage more use of fixed route

GOCARY

Operations Considerations

Points of Contact

- Primary: TeLeishia Holloway, Transit Program Coordinator
- Planning: Kevin Wyrauch, Kelly Blazey
- Outreach: Fabian Rodriquez

Service Notes

- Contracted fixed-route service; provide Apex's fixed-route service through contractor
- Contracted demand-response (door-to-door) service offered in three tiers; provide Morrisville's microtransit service through contractor
- Service remains fare free and is likely to stay this way

Location

- Operations: 1107 Trinity Road, Raleigh
- Administration: TeLeishia: 120 Mary Odell Place, Cary (senior center)
- Administration: Kevin and Kelly: 316 N Academy St, Cary (town hall);
- Note: Cary is in designing a new maintenance and ops facility; have a site designated (in design phase). Once complete, town transit staff would be co-located there.

Scheduling and Dispatching Software

- Trapeze

Trip Planner

- Same as GoTriangle

Other Notes

- Several retirement communities have their own shuttles - typically only a few days/week
- TeLeishia supports eligibility reviews and provides mobility management assistance through her on-site work at the senior center.
- Total Life Center located adjacent to senior center; receive many trip requests to this destination, including from outside Cary (e.g., Garner), which GoCary cannot fulfill
- Barriers - not being able to accommodate people who want to get into Cary - since not a resident, service area, reach out to partners, try to coordinate travel
- Difficult to track unmet needs

Goals and Expectations

- Would like to serve more Cary residents who wish to travel outside of Cary; capacity for such trips is limited; coordinate more with regional fixed route (GoTriangle)
- Want to see MM get to know the agencies ASAP, so can provide solutions
- Have centralized information, a one stop shop
- Clarify eligibility for different services; educate customers, provide travel training

GOWAKE ACCESS

Operations Considerations

Points of Contact

- Primary: Anita Davis, Transportation Program Manager
- Secondary: Nikki Abija, Transportation Planner
- Contractor: See below

Service Notes

- Contracted demand-response service (jointly with GoRaleigh)
  – Medicaid, Resources for Seniors, Elderly Disabled, rural transportation
- Cover all of Wake County, including to Durham and Chapel Hill under Medicaid
- Provide ADA for GoApex
- Have been operating microtransit pilot in northeast Wake County; have funds to continue post pilot
  – https://www.wake.gov/departments-government/health-human-services/programs-assistance/gowake-smartride-ne
- New contractor coming onboard (RATP Dev) to jointly operate with GoRaleigh Access

Location

- Operations: 1430 Blount Street, Raleigh
- Administration: 4401 Bland Road, Raleigh
- Future combined paratransit center (with GoRaleigh Access) will include space for more administrative staff (see GoRaleigh)

Scheduling and Dispatching Software

- Had been using RouteMatch; required new contractor to include own software (Ecolane) – need to further coordinate with GoRaleigh if software to be different

Trip Planner

- None

Other Notes

- County gives some funding to Resources for Seniors and Arc of Triangle, ROAP Elderly and Disabled and 5310 for transporting dialysis and chemo for 65+
- Coordinate closely with Wake County regional centers, centers for volunteer caregiving; senior nutrition sites, senior facilities, CACs - lots of stakeholders spread across different agencies

Goals and Expectations

- Focus on rural transportation challenges; coordinate closely with HARTS, KARTS, JCATS for trips into Wake County
- Establish transfer sites at hub stations and at regional centers
- Want to see more mobility coordination
- Need to ID where it can work and have this be an early task working with the providers
- Work with different operations managers on how to exchange information; work with planners and program managers, set some priorities and see what's possible
- Need to identify projects and more funding with better communication among call centers and drivers to understand how operations work
- Want to see customer service and drivers involved and for training to be improved to improve service delivery to customers
- Need regional coordination and data tracking
- Ensure MM is articulating the challenges and advocating for more resources to be allocated

GOAPEX

Operations Considerations

Points of Contact

- Primary: Katie Schwing, Senior Planner, Long Range Transit, Town of Apex
- Other: Shannon Cox, Long-Range Planning Manager, Town of Apex
- Contractors: See below

Service Notes

Fixed Route

- Route 1 local service began in July 2022
- Service overlaps with GoCary ACX route and GoTriangle Route 305
- Operated thorough service agreement with GoCary (fully loaded hourly fee)

Demand Response

- ADA service under contract with GoWake Access (monthly OH plus hourly fee)
- Limited demand for ADA thus far
- Overlap with GoCary Door to Door Tier 3 service
- GoWake Access provides other rural services for eligible clients
- Some senior living communities have their own shuttles

Location

- See above for contractors
- Administration: 73 Hunter Street, Apex

Scheduling and Dispatching Software

- N/A

Trip Planner

- Website not same as other Go agencies, but link to tracker provided https://triangle.transloc.com/

Other Notes

- Senior center has lots of active programming; Apex has a relationship with Resources for Seniors (staff senior center) to help them navigate available services; mostly rely on Wake County for human services programs.
- New department of Community Development and Neighborhood Connections being established; may be a new liaison role
- Work with Western Wake Community Advocacy Committee. W Wake Crisis Ministry - food assistance, financial, advice and resources for navigation; White Oak Foundation, not as large as W Wake, but with a similar mission
- Important for localities to fully understand the funding environment. Apex is a community funding area.
- At least 1x month receive questions about how to get to Durham or CH. Apex is W Wake and there are needs that are unmet

Goals and Expectations

- Overall, very positive about MM, looking forward to having a MM as coordinator to clarify programs that are available
- Not expecting to contribute funds
- Fully expect to participate and support, keep information current, participate in MCC
- Coordination with senior centers should be ongoing
- Interest in travel training
- Make sure reporting and tracking provides feedback to the community.
- Interest in seeing services streamlined when overlaps are present

HARNETT AREA RURAL TRANSIT SYSTEM (HARTS)

Operations Considerations

Points of Contact

- Primary: Barry Blevens, Director of General Services
- Transit Operations: Chance Torain

Service Notes

- Directly operated service
- From website: HARTS provides transportation through subscription routes, Dial-A-Ride, and demand-response service trips. As a paratransit and ridesharing public transportation system, HARTS structures routes and schedules to transport as many different passengers as possible using various fare types and destinations.
- Cannot fully meet demand: service constrained by shortage of drivers; When fully staffed with 27 vehicles went to Raleigh Durham area 5 days week with at least 1 bus; now at 2 days/week
    - Tracking but not reporting denials
- Require reservations at least 2 days prior and ask customers to call 1 day prior to confirm availability.
- Trips into CAMPO region are mostly reimbursed (Medicaid)
- Some interest in new Anger (within CAMPO region) and Fuquay-Varina, if advanced would likely be deviated fixed route.

Location

- Operations and Administration: 250 Alexander Driver, Lillington

Scheduling and Dispatching Software

- CTS Software (Wilmington, NC) – same as JCATS

Other Notes

- Limited other options for transportation in the county
- Some demand for veterans to access services in Durham
- New rider education is important to understand how to reserve (and get) trips

Goals and Expectations

- Very interested in staying involved
- Would like to be able to share resources as applicable

JOHNSTON COUNTY AREA TRANSIT SYSTEM (JCATS)

Operations Considerations

Points of Contact

- Primary: Neal Davis, JCATS Mobility Manager
- Other: Josh Jensen, Executive Director, Community and Senior Services of Johnston County, Inc.

Service Notes

- Directly operated demand-response service
  - Medicaid and general public, contracts with DSS, aging programs
  - Serve vocational rehab facility and large manufacturing facility in Selma
- Operating microtransit pilot in Selma/Smithfield
  - https://www.cssjohnston.org/quickride
  - Looking for funding to continue if successful
  - Using CTS software (see below)
- $6 each way; same fare as travel within county

Location

- Operations and Administration: 1050 West Noble Street, Selma

Scheduling and Dispatching Software

- CTS (Wilmington, NC); same as HARTS

Trip Planner

- None

Other Notes

- Neal is developing a mobility management program in Johnston County and will be a great resource
- Trips to other counties the biggest challenge

Goals and Expectations

- Ideally will be able to coordinate with other providers on trips outside county
- Would like to move to a brokerage model where trips are assigned to available provider as appropriate based on capacity
- Would like to see good tracking and reporting on the extent of the need, including unmet trip requests

KERR AREA TRANSPORTATION AUTHORITY (KARTS)

Operations Considerations

Points of Contact

- Primary: Dr. Mary Young, (Interim Executive Director)
- Transportation Coordinator: Alison Pegram

Service Notes

- Directly operated demand-response service in Franklin, Granville, Vance and Warren counties
- Medicaid (about 30%) and rural general public
- Vans to Raleigh, Durham, CH 3 days/week

- Driver shortage limiting capacity (need 15-20 additional drivers)

Location

- 575 Ross Mill Rd, Henderson

Scheduling and Dispatching Software

- RouteMatch (now Trip Spark)

Trip Planner

- None

Other Notes

- Need to re-educate funding partners about purpose of service
- Need assistance with grants
- Want to improve tracking and reporting
- Funding is an issue
- Cannot keep track of rides provided

Goals and Expectations

- To be included in the process and ideally to receive some technical support

APPENDIX C: SUMMARY OF PEER BEST PRACTICES AND STRATEGIES

Mobility Management Implementation Study

Summary of Peer Best Practices and Strategies

March 2022

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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). This report summarizes the results of Task 5, a review of peer best practices and strategies.

Following this introduction, the 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 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.

IDENTIFICATION OF PEER REGIONS

The consulting team worked with the project's Technical Steering Committee (TSC) to select peer regions. The team identified seven possible regions for consideration and discussion. The TSC selected six, one more than required in the project scope:

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

The Phoenix, Arizona was initially suggested but not selected.

The Nelson\Nygaard team compiled information on mobility management programs through online research, our experience working directly with several of the peer regions, and interviews with staff or consultants.

2   PEER REGION: AUSTIN

Regional Context

Austin is one of the fastest growing cities in the U.S. Its population doubles every twenty years. In addition to being the state capitol, Austin is the Travis County seat and anchor of Central Texas. The region's coordinated planning efforts are facilitated through the Capital Area Metropolitan Planning Organization (CAMPO), which covers a 10-county region. Mobility management was identified as a coordinated plan strategy over a decade ago.

Mobility Management

The Central Texas Office of Mobility Management (OMM) (www.mytxride.com) was established to facilitate mobility management in the region. The OMM is a collaboration between the nine-county Capital Area Rural Transit System (CARTS) and the Austin-based Capital Metropolitan Transportation Authority (Capital Metro). The OMM helps clients navigate transportation options across Travis, Williamson, Hays, Blanco, Bastrop, Burnet, Fayette, Caldwell, Llano, and Lee counties. See Figure 1.

Figure 1: Austin, TX Office of Mobility Management Service Area
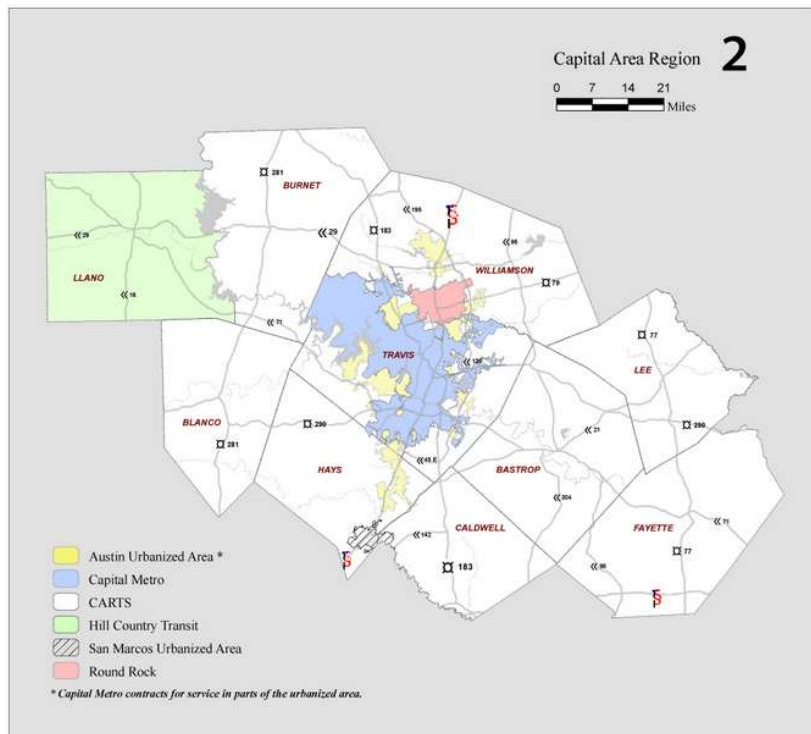
Staffing and Funding

The OMM was funded through a $500,000 FTA Jobs Access Reverse Commute (JARC) grant. From the beginning, the project was supported by several stakeholders, including local governments and transportation agencies, nonprofits, and the Regional Transit Coordination Committee (RTCC), the committee designated to aid in implementing the region's coordinated plan.

The mobility manager positions were initially housed at CARTS, and the first mobility manager regularly traveled between both CARTS and Capital Metro to provide services. As the region grew, CARTS moved from downtown Austin to an operations and maintenance facility near Bastrop. The OMM relocated to Capital Metro's office in East Austin. Capital Metro fully funds OMM with support from a FTA Section 5310[1] (Section 5310) grant. A local planner and a trip planning specialist support OMM.

Transportation providers can contract directly with Capital Metro for OMM services or fund their own mobility management services with FTA funds (direct recipient or subrecipient). Currently, the City of Round Rock receives direct funds for a transit coordinator position. Other cities in the service area contract with Capital Metro for mobility management services.

Services Offered

Example OMM services include:

- Trip planning
- Coordination with existing transportation providers and between CARTS and Capital Metro
- Regional planning, and
- Identification of projects aimed at closing service gaps

OMM publishes a Transportation Service Guide in both English and Spanish. This guide provides information regarding nonprofit services, public transportation, and other transportation resources in the area.

CARTS and Capital Metro collaborate through the OMM and help coordinate funding and education, especially with new developments and organizations.

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[1] Federal Transit Administration Enhanced Mobility of Seniors & Individuals with Disabilities (Section 5310). See https://www.transit.dot.gov/funding/grants/enhanced-mobility-seniors-individuals-disabilities-section-5310.

MMIS Ideas for Consideration

- Consider using Section 5310 funding as seed money to fund mobility management services and staff
- Maintain and publish a transportation service guide

Sources and Further Information

Information for this peer is from Nelson\Nygaard consulting work with CAMPO Austin. For more information, see https://www.austintexas.gov/edims/document.cfm?id=216750.

3   PEER REGION: COLUMBUS

Regional Context

Columbus, Ohio, the state capital, is the largest city in the state by population and the 14th largest in the U.S. The 2020 metropolitan area population was just over 2.1 million people. Columbus was awarded $50 million as the winner of the U.S. DOT Smart City Challenge and has invested in a number of programs aimed at improving mobility.[2] Regional planning is coordinated through the Mid-Ohio Regional Planning Commission (MORPC).

State-Level Mobility Management

The State of Ohio has had a mobility management program since the mid-2000s and currently has a tiered mobility management program. The Ohio Department of Transportation (ODOT) administers federal and state transit funding through the Office of Transit. ODOT also administers the statewide Mobility Management Program, whose purpose is to increase access to mobility for Ohioans by increasing understanding and awareness of transportation needs, coordination of transportation options to meet needs, and building sustainable and healthy communities by integrating transportation into planning and programs.

The Ohio Mobility Management Program is overseen by a statewide mobility coordinator position created in 2017 and located in the Office of Transit. The mobility coordinator conduct quarterly in-person meetings with local and regional mobility managers, provides resources to enhance and support improved coordination of human service and public transportation, and facilitates a mobility manager training program. The mobility coordinator also facilitates the development of statewide marketing and outreach efforts, that include a brochure that describes mobility management services in the state and is used to educate and inform stakeholder outside ODOT on the impact and importance of the program.

Ohio's mobility management program is a component of a broader state-level effort to improve and expand mobility. Mobility Ohio is a multi-agency effort led by ODOT to improve the safety, access, and quality of the state's health and human service transportation network by establishing a consistent and effective oversight structure and

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[2] See www.smartcolumbus.gov

increasing inter-agency coordination. The overall vision is to address unmet transportation needs identified by stakeholders in the Ohio Statewide Transit Needs study, Transportation Challenges for Ohioans with Disabilities study, and the Ohio Mobility Transformation study. Through the Mobility Ohio vision, ODOT has established ten Human Service Transportation Coordination (HSTC) regions. See Figure 2. These regions were established based on a combination of travel movements in Ohio and various planning agency boundaries. The Ohio Mid-Eastern Government Association (OMEGA) HSTC region was selected as the initial pilot region, primarily since the region has an established regional transportation structure.

Figure 2: ODOT Human Service Transportation Coordination (HSTC) Regions
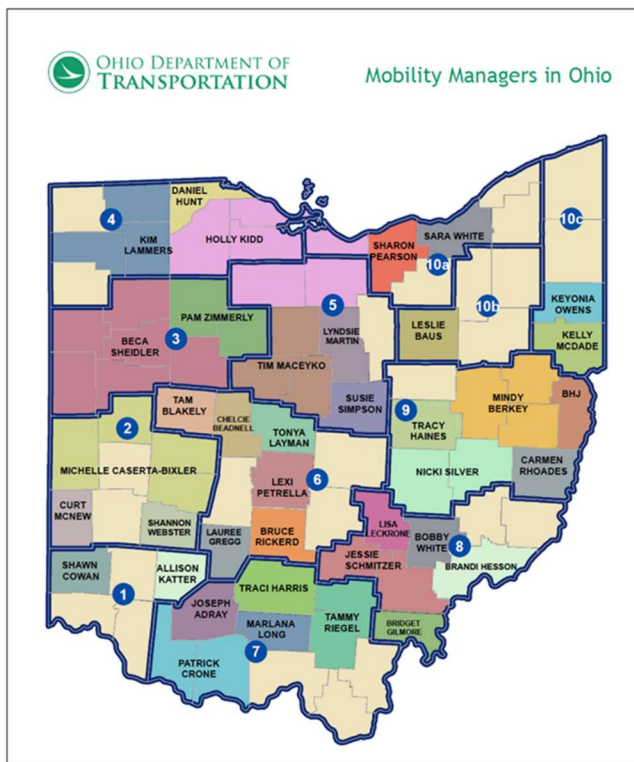
ODOT currently supports 37 regional and local mobility management programs, housed within different agencies that have taken the lead on coordination efforts and that are a mix of transit systems, planning agencies, and human service providers. ODOT funds mobility management activities primarily through the Section 5310, though projects are also eligible through the Rural Transit Program (Section 5311). Treated as a capital expense through these programs, ODOT provides 80% of the total cost of eligible expenses with the remaining 20% provided locally. Mobility management program subrecipients must be eligible for Section 5310 or Section 5311 funding. Eligible entities include private nonprofit organizations, and state or local government authorities that are approved by ODOT to coordinate services for older adults and individuals with

disabilities and certifies that there are no nonprofit organizations readily available in the area to provide the services. Large regional MPOs, like the Mid-Ohio Regional Planning Committee, receive and distribute their own Section 5310 funding.

ODOT requires that all mobility management projects be derived from a coordinated transportation plan and be competitively selected. Mobility managers are responsible for updating the coordinated transportation plans for their service areas.

Regional Mobility Management

MORPC partnered with ODOT to pilot a regional mobility management program.[3] MORPC created a steering committee of mobility agencies, transit agencies, and other regional stakeholders to guide the local mobility management process. This steering committee worked to create a regional plan for mobility management, which included a series of virtual public meetings The Regional Mobility Plan[4] was adopted in February 2022. The plan includes goals and strategies for each county, but each county is required to create their own implementation plans.

MMIS Ideas for Consideration

- Consider making mobility management services available at different levels (municipal, county, regional) tailored to the size of each agency
- Seek state matching funds to incentivize mobility management

Sources and Further Information

The team interviewed Lexi Petrella (Mid-Ohio Regional Planning Commission) and Macie Moore (Ohio Department of Transportation) and used information from Nelson\Nygaard and KFH's case studies for the Nevada DOT Mobility Management project.

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[3] The Columbus, Ohio region is not part of the Ohio Mid-Eastern Government Association (OMEGA) HSTC region.

[4] https://www.morpc.org/program-service/regional-mobility-plan/

4   PEER REGION: DENVER

Regional Context

Denver, Colorado, the state capital, is one of the fastest growing urban areas in the nation. The 2020 reginal population was just under three million. Regional planning is coordinated through the Denver Regional Council of Governments (DRCOG).

DRMAC

The Denver Regional Mobility and Access Council (DRMAC) is the mobility management coordination agency for the Denver region. Their mission is "to promote mobility and access for all by addressing transit needs through public outreach and by coordinating the efforts of government agencies and transit providers."[5] DRMAC serves as the regional coordinating council, and as such oversees local coordinating councils in seven counties around the Denver metropolitan area. Local coordinating councils are a partnership of individuals, local government, community organizations and other groups working together to identify and fulfill the public and human service transportation needs of their counties, with key target populations being seniors, individuals with disabilities and low-income populations. DRMAC also participates and advocates with a variety of groups and organizations on the future and needs of human services and transportation in the region. See Figure 3.

Figure 3: DRMAC Region

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[5] https://drmac-co.org/about/our-vision/.
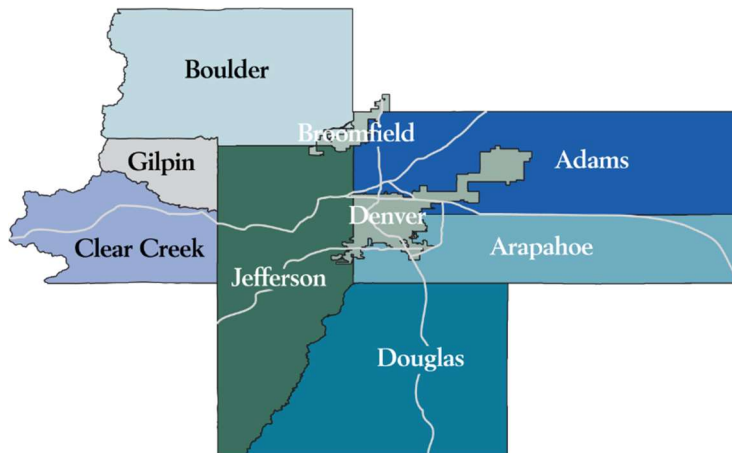
In addition, DRMAC partners with other agencies to offer training (including on how to work with riders with disabilities, how to use transit, and how to qualify for services) and provides education to community organizations on transit gaps and opportunities. Partners that are involved with DRMAC include Vision Zero, the Denver Streets Partnership, the Mile High Connects Affordable Fares effort and the ADA Paratransit Advisory Council, among others.

DRMAC began as a collaboration between community foundations who noticed that people who are most transit dependent are the ones who fall through the cracks. These foundations started by publishing a one-pager of all the transportation services in the region. Now, DRMAC has expanded to a coordination council.

Staffing and Funding

DRMAC was initially funded by human service agencies. Ten years ago, DRMAC began applying for human services transportation and Section 5310 funding. Now, DRMAC is primarily funded by Section 5310 as the region's coordinating council. DRMAC also received funding from the Next 50 initiatives and air quality funding. DRMAC has five full time staff members and has interns. The full-time program manager oversees the Metropolitan Area Transit Training Program. A second full-time mobility manager oversees DRMAC's Getting There smartphone app (see below). Interns allow DRMAC to attend every transit agency meeting to understand what services are or are not being provided in the region.

Services Offered

DRMAC has a help line providing transportation assistance and information, and also produces the Getting There Guide listing transportation services in the Denver area. In addition, DRMAC created the Getting There smartphone app, which helps older adults in finding transportation. Guidance is based on location, destination, and required accommodations. During COVID-19, DRMAC moved their services online. At the beginning of the pandemic, DRMAC staff were calling all 65 providers every day about which services they were offering. DRMAC's webpage is intended to be a central point to identify services that are being offered and identify what is not being offered.

MMIS Ideas for Consideration

- Consider using Section 5310 funding both to start and to sustain a mobility management program
- Publish resources guide (online and print)
- Establish internship programs to broaden mobility management's reach

Sources and Further Information

Information for this study is from prior Nelson\Nygaard research. See https://drmac-co.org/ for more information.

5   PEER REGION: NASHVILLE

Regional Context

Nashville is Tennessee's capital city. The Greater Nashville Regional Council is the region's metropolitan planning organization (MPO). The 2020 regional population was just under two million people.

State-Level Mobility Management

The state passed the Tennessee Accessible Transportation and Mobility Act of 2020. This act created a new of Mobility and Accessible Transportation (OMAT) within TDOT. The office is charged with providing resources and expertise for expanding and improving accessible transportation and mobility across the state. OMAT hires and oversees mobility managers for nine Tennessee mobility management regions, which coincide with the nine human resource agency (HRA) regions. See Figure 4.

Figure 4: Tennessee's Mobility Management Regions
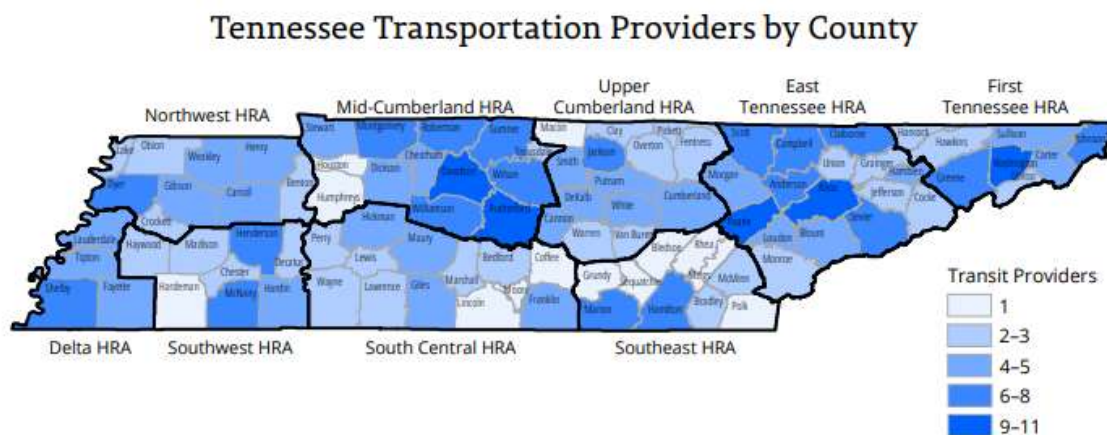
The law requires that by March 31, 2021, OMAT would produce and share with the Tennessee General Assembly a mission statement and five-year strategic plan. This plan, along with the state's first annual report about accessible transportation, highlighted Tennessee's mission, goals, and priorities for supporting transportation services that provide mobility while making effective use of existing dollars and resources. Work continues on the action items to implement the goals and objectives identified in the five-year strategic plan. This includes the formation of a state-level committee that would be comprised of representatives from a transportation work group that led the passing of the legislation and provided oversight of the OMAT formation. OMAT now has mobility managers for 60% of Tennessee, divided into regions. COVID-19

significantly delayed OMAT hiring mobility managers and mobility management implementation. The office just kicked off their first mobility management program in Morrisville.

State Funding

OMAT's mobility management programs are funded with Section 5310 dollars; and the office provides Section 5310 funding to rural programs, including the new Morristown mobility management program.

Local Mobility Management

Large urban areas like Nashville or Memphis typically have a regional mobility manager at the state level (a mobility manager is currently being hired for Nashville's Mid-Cumberland region) and often have a local mobility manager, housed at a DOT or transit agency. Currently, Nashville does not currently have a mobility manager and employees at WeGo (Nashville's transit authority) handle portions of mobility management and coordination. WeGo's mobility management program is focused on paratransit and TDM. The largest issues in Nashville are connections into Nashville from rural and suburban areas. Like the GoWake SmartRide NE, WeGo runs WeGo Link. This service is a partnership between WeGo, Uber, and Mobility Solutions for any rider who finds getting to and from fixed-route transit difficult. Nashville also has an extensive TDM program as a part of its mobility management. Nashville Connector is a commuting trip planning site for Nashville employers and employees. It provides a one-stop shop for commuting options. WeGo also piloted a flat rate employee transit program called EasyRide.

Local Funding

In Tennessee, large cities like Nashville receive Section 5310 funding directly. Some TDM programs receive funding from the state Congestion Mitigation and Air Quality (CMAQ) Improvement Program. Nashville has not done public outreach about their mobility management programs, nor do they have an interlocal agreement.

MMIS Ideas for Consideration

- Consider using Section 5310 funding both to start and to sustain a mobility management program
- Given the potential for staff turnover, ensure that committee support is available to sustain the program

Sources and Further Information

Nelson\Nygaard interviewed Marty Sewell (Nashville DOT), Daniel McDonell (TDOT, Multimodal Transportation Resources Division), Brianna Benson (TDOT, Air Quality Office), and Emily Duchac (TDOT, Office of Mobility and Accessible Transportation).

For further information visit https://www.tn.gov/tdot/multimodal-transportation-resources/omat.html

6 PEER REGION: SAN FRANCISCO

Regional Context

The San Francisco Bay Area has a population of more than seven million inhabitants. The Metropolitan Transportation Commission is the region's MPO. There are 27 different transit agencies covering a fragmented area with a patchwork of various services and programs.

County-Level Mobility Management

See below for a discussion of San Francisco's program.

Efforts toward countywide mobility management include the following:

- The Alameda County Transportation Commission (Alameda CTC) still hosts AccessAlameda.org and Eden Information and Referral (the county 2-1-1 provider) received a Section 5310 grant to hire a Mobility Manager.

- Contra Costa Transportation Authority and Contra Costa County completed and adopted an Accessible Transportation Strategic Plan, which recommended creation of a task force and eventually a coordinating entity.

- Marin Transit has continued to support the Marin Mobility Consortium, whose purpose is to plan and take action to improve and expand transportation options for Marin's senior, disabled, and low-income residents.

- San Mateo County continues to offer PeninsulaRides.com which provides information about transportation options to people with mobility challenges so they can get around in and beyond San Mateo County.

- Santa Clara County completed and adopted a transportation needs assessment of several vulnerable communities including youth in foster care; individuals with serious mental illnesses and/or medical conditions accessing county services; individuals with serious mental illnesses and/or medical conditions being released from hospital, jail, or service programs; older adults and people with disabilities; non-risk criminal witnesses and victims of crime; and adults on probation. The first two Tier 1 strategies identified were: work with MTC to designate the county as (or a contractor) a consolidated transportation service agency (CTSA) and create a mobility manager position to oversee countywide transportation services and programs. VTA is currently working on a mobility assistance program to create more mobility management services to fill gaps.

- The Solano Transportation Authority continues to provide the Solano Mobility website (SolanoMobility.org) and call center, which provides guidance and information regarding mobility and transportation options in the county.
- The Sonoma County Area Agency on Aging maintains the Sonoma Access website (sonomasenioraccess.org) and recently completed and adopted the Sonoma County Connected Communities Transportation Study, a comprehensive needs assessment and action plan to identify strategies for transportation service delivery that serves older adults and individuals with disabilities, prioritizing low-income and geographically isolated individuals.

Mobility Management in San Francisco

Mobility management programs in San Francisco aim to help older adults and individuals with disabilities by proposing solutions and providing information to assist riders in making transportation choices. The San Francisco Metropolitan Transportation Authority (SFMTA) coordinates mobility management through The Mobility Management Center (Center). SFMTA has contracted with Transdev to operate the Center, SF Paratransit, and other services for the disability community in San Francisco.

The Mobility Management Center

The Mobility Management Center (Center) is a one-stop center for information and referrals for seniors and individuals with disabilities, helping riders make the best transportation choices. Its goals are to:

- Centralize a variety of transportation information
- Improve quality of information
- Eliminate barriers to information access, and
- Provide comprehensive transportation resources

The Center focuses on:

- **Outreach**: The aim is to meet the people they serve where they are. From community events, libraries, and senior centers to VA offices and other organizations serving seniors and individuals with disabilities.
- **Information**: Provide information about available options, training, and other resources.
- **Referral**: Provide enrollment support for all transportation program applications, in addition to connections to other resources in the Bay Area. The Center is also developing relationships with agencies and other providers to establish onsite mobility management support.

Customers can reach the Center online or by email

Services Offered

Services coordinated through the Center include:

- **SF Access**: pre-scheduled, shared-ride, ADA-compliant van service providing door-to-door transportation to certified riders.

- **Paratransit Taxi & Ramp Taxi:** ride service that utilizes San Francisco taxis and ramp taxis available to the general public. This is not an ADA service, but many riders find that it better meets their transportation needs. Taxi service is available for certified riders and offers a specific debit card for payment.

- **Group Van:** pre-scheduled van service providing door-to-door transportation to groups of ADA eligible riders attending certain agency programs such as Adult Day Health Care, senior centers or work sites.

- **Shop-a-Round:** convenient, low-cost shuttle that makes it easier to go grocery shopping. The service offers registered seniors and people with disabilities personalized assistance not available on Muni. A rider must register for this service but does not have to be ADA-paratransit eligible to use this service. Grouped riders are transported to select supermarkets in San Francisco to shop. The driver will help carry groceries on and off the shuttle upon request.

- **Van Gogh:** low-cost, pre-scheduled van shuttle service offered to groups of seniors and/or people with disabilities to attend social and cultural events in San Francisco through a social service agency or program.

- **Essential Trip Card (ETC):** a discount taxi rides program created to address essential trip needs of seniors and people with disabilities who are unable to access a bus stop or pay for public transportation during the COVID period. The program has served an important role filling geographic and temporal gaps where fixed route segments have been discontinued. Although 4,000 individuals are registered with the program, it is only used by a small subset of eligible riders, reflecting its design as a safety net program. Riders take approximately 6,000 trips per month. The ETC program subsidizes about two to three round trips by taxi per month for older adults (persons 65 and older) and people with disabilities. In contrast to the regular subsidized taxi program, participants do not need to be ADA eligible. They only need to provide some form of verification to confirm either their age or their disability. Eligible participants pay 20% of the cost of a regular cab ride fare for essential trips. The program uses taxis to take people on essential trips like going to the grocery store, pharmacy, or other

necessary medical trips. Customers who pay $12 receive $60 value for taxi trips on a debit card. The service may be continued in the future.

- Hospital shuttles and transportation network companies (TNCs) / Concierge ride services

  – Information, Referral & Support

  – Muni Accessibility Guide

  – Free Muni For Seniors and People With Disabilities

  – Regional Transportation Clipper Cards

  – Travel training for groups and individuals unfamiliar with the public transportation system.

MMIS Ideas for Consideration

- Consider integrating mobility management, travel training, and ADA paratransit eligibility and possibly locating these services in a combined facility

- On transit agency websites, offer information on adjacent transportation services to help customers find other resources and options

Further Information

Information for this study is from prior Nelson\Nygaard research. See https://www.sfmta.com/getting-around/accessibility/contact-mobility-management-center

7   PEER REGION: CHARLOTTE

Regional Context

Charlotte is the largest city in North Carolina. The metropolitan area had a 2020 population of approximately 2.9 million. Regional planning is coordinated through the Charlotte Region Transportation Planning Organization (CRTPO). Charlotte is also part of the Centralina Regional Council.

Centralina Regional Council

Charlotte is in Mecklenburg County and is part of the Centralina Regional Council. See Figure 5. The council recently completed CONNECT Our Future, a three-year engagement effort to develop regional priorities and a regional growth framework, and transportation was identified as a top priority. The Council created CONNECT Beyond, the region's first coordinated mobility plan.[6]

The plan recommends a comprehensive regional mobility management program that connects traditional fixed-route bus services with commuter rail, light rail, streetcar, emerging mobility services, micromobility, and shared mobility. The plan also recommends mobility connection points, where users can transfer between mobility services, mobility-friendly places where pedestrians can use public transit to access common destinations, transportation demand management (TDM) strategies to increase mobility options, and mobility user tools like one-click apps and trip planning apps for the entire region.

The plan recommends having a regional mobility manager to oversee the 12 counties. However, the individual counties do not need to fund a separate mobility manager position for each county. CONNECT Beyond is a cross-county and cross-state partnership. Because of this status, the partnership can apply for NCDOT.

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[6] https://www.connect-beyond.com/docs/CONNECT_Beyond_Final_Report_Final.pdf

Figure 5: Centralina Region

Charlotte-Mecklenburg County Mobility Management

Charlotte's 2016 Coordinated Human Services Transportation Plan (CHSTP) set a strategy for regional mobility management. The strategy intends to facilitate coordination among existing public and human services transportation providers in the Charlotte Urbanized Area through mobility management. Mobility management projects identified in the plan include :

- Creating a department of transportation coordination
- Integrating social services sites
- Centralizing demand responsive dispatching with online options
- Establishing a centralized intake-dispatch brokerage to integrate STS, PVH, county, and city transportation services
- Hiring a mobility manager to coordinate community transportation resources
- Implementing technology for one-stop transportation
- Facilitating regional communication, and
- Developing and implementing standardized demand responsive ridership eligibility guidelines

The recommendation to hire a mobility manager was not implemented. Charlotte is currently updating their coordinated plan and a draft was expected to be completed in March 2022. Similar to the CAMPO region, considerable growth is occurring outside of the Mecklenburg County where fixed-route transit is limited. Despite the mobility

management recommendations in the original coordinated plan, there is little to no mobility coordination happening outside of the larger Centralina Regional Council.

Were the region to hire a mobility manager at some point, that individual would likely be assigned to the Charlotte Regional Transportation Planning Organization (CRTPO) as opposed to a City of Charlotte or Mecklenburg County office. See Figure 6.

Figure 6: CRTPO Service Area

Mecklenburg County currently has a ¼ cent sales tax to fund the county's light rail system, but county leaders are considering advocating for a countywide election to increase the sales tax to fund additional transportation programs. Mobility management could potentially be funded through this tax.

State-Level Mobility Management

The State of North Carolina had historically offered incentives for regions and municipalities to establish mobility management programs and offered funding through Section 5310 accompanied by a 50% state match. NCDOT ended the program given the low participation. Those involved in mobility management were doing some travel training but worked for local transit agencies on other tasks. NCDOT has since recognized the value of mobility management and expressed interest in reviving this program.

NCDOT now recognizes that mobility management is about broad coordination of all the different mobility services in an area and optimizing those services to provide the best, most efficient streamlined experience for customers as possible. Mobility managers

should be the conduit to improve access, help meet demand, link goals with mobility solutions that are available, and ultimately connect services with the client to use those solutions effectively. NCDOT believes that a key focus area for mobility managers should be technology and innovation. The agency's vision is that there would be a statewide Mobility as a Service (MaaS) solution so all riders can use the same website to plan, schedule, and pay for trips. The mobility managers would be helpful in achieving statewide MAAS and ensuring local mobility solutions are funneled into this service.

MMIS Ideas for Consideration

- NCDOT's renewed interest in mobility management presents an opportunity for further engagement and possible funding.

Sources and Further Information

Nelson\Nygaard interviewed with Ryan Brumfield (NCDOT) and Lyuba Zuyeva (VHB). VHB is the CATS coordinated plan consultant.

8 PEER STRATEGIES

Based on interviews conducted for this project and Nelson\Nygaard research, this section provides an initial summary of potential strategies that may be applicable to the CAMPO region. See Figure 7. As the MMIS advances, the consultant team, CAMPO staff, the TSC, and other stakeholders will have the opportunity to discuss and vet these and other strategies.

Figure 7: Summary of Possible Peer Strategies

Strategy	Applicable Region	Comment
Establish Mobility Management Employment Guidelines	Columbus	
Develop, Maintain, and Publish Transportation Resource Information	Austin, Denver, San Francisco	
Integrate Mobility Management Information into Transportation Websites	San Francisco	Related to customer service
Train Customer Service Staff to Assist with Mobility Management	San Francisco	Related to website information; example provided from Rhode Island
Integrate TDM and Mobility Management		Example provided from North New Jersey

Strategy: Establish Mobility Management Employment Guidelines

Based on the peer research and Nelson\Nygaard's project experience, it is important to establish clear employment guidelines for mobility management program staff. This includes mobility manager job descriptions, performance metrics and training, and consideration of where mobility management staff might be located.

Job Description

Having a thorough job description is critical. In addition to spelling out what the job entails, it is helpful to describe what the job does not include. This can help prevent a situation where the mobility manager undertakes tasks that an agency may need performed but are unrelated to mobility management. See appendix for a sample job description from Wilmington, Ohio.

Performance Metrics

As with any position, having ways to measure performance is important. Metrics also help focus mobility managers on transportation coordination tasks.

Training

The Ohio DOT provides an e-learning course series for mobility management, which provides background on coordinated public transit.

Office Location

Because the location of the mobility manager's office can shape the program, this is also an important consideration. Mobility managers can work regionally or locally and be housed at a regional planning agency, a transit agency, a municipality, or another agency.

Strategy: Develop, Maintain, and Publish Transportation Resource Information

Developing, maintaining, and publishing comprehensive transportation resource information, including about demand-response services, is a fundamental coordination and mobility management strategy. Many agencies across the U.S. have developed such resources by investing in 1-call/1-click programs that enable users to call one phone number or visit one website.

These programs all begin with a well-maintained directory of transportation resources. Directories can spreadsheets, internal or external documents, or websites. In many parts of the CAMPO region, overlapping services with different eligibility requirements, hours of operation, and fares make the demand response and human services transportation systems difficult to understand.

Providing consistent, overarching information on travel options, eligibility, fare options, and other aspects of service supports mobility and improves transportation coordination. Two of the peer regions (Denver and Austin) publish transportation guides. Such guides are produced early in the evolution of a region's mobility management program.

Austin's Transportation Services and Senior Ride Guide provides information on transportation providers broken out by categories like rural transportation, wheelchair accessible services, ambulance services, and local bus and rail services. See Figure 8. The guide also provides resources for seniors who still drive but may want to use OMM services one day.

Denver's DRMAC publishes a similar list of providers in the Getting There Guide. See Figure 9. The guide lists fixed route providers, airport shuttle providers, non-emergency medical transportation, and private provider options. DRMAC also provides information on fare assistance programs.

Figure 8: Greater Austin Transportation Services and Senior Ride Guide[7]
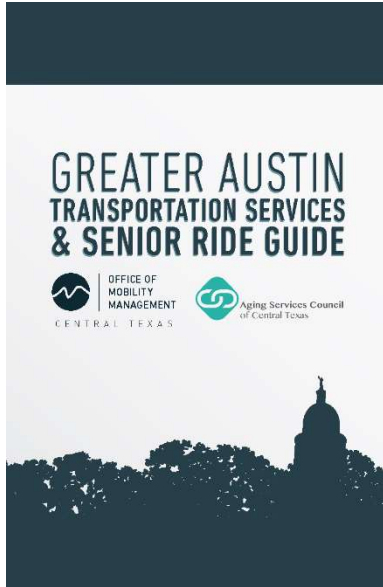
Figure 9: DRMAC Getting There Guide[8]

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[7] https://mytxride.com/docs/Transportation-Services-Guide.pdf

[8] https://drmac-co.org/wp-content/uploads/2021/10/GTG-English.NOV_.2021.COLOR_.2Final.pdf

Strategy: Integrate Mobility Management Information into Transportation Websites

Visitors to public transportation websites should be able to learn what they need to plan their travel and use available resources. This includes myriad demand-response options that are either not well explained or even noted. The lack of information is not unique to the CAMPO region. Embedded trip planners such as those on the region's fixed-route provider websites will offer a fixed-route and walking solution but do not include links or resources about other transportation services.

This strategy addresses the lack of demand-response information by updating provider websites to direct visitors to mobility management resources. In some instances, this means incorporating a message such as "A convenient fixed-route bus solution is not available for this trip. Please click here or call this number for additional information. The linked website should be the same for all providers and offer the menu of alternative services. This can include a published directory, if applicable, or text and links to available providers and solutions.

SMFTA has a webpage that provides basic information on the public transportation providers throughout the San Francisco Bay Area.[9] SFMTA also has a webpage listing transportation services and options for older adults and people with disabilities.[10]

Strategy: Train Customer Service Staff to Assist with Management

This strategy is related to the preceding transportation website strategy. It standardizes what information call center staff give to customers seeking a transportation service that the agency cannot provide directly. Having standard language can support the effort to develop, provide, and maintain consistent information and training resources for professionals assisting clients needing human services transportation. Templates can be developed for call center staff so they do not have to maintain their own information. If a website is available, the staff can consult the site while they are speaking to customers.

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[9] https://www.sfmta.com/getting-around/regional-transit-connections

[10] https://www.sfmta.com/getting-around/accessibility/muni

Nelson\Nygaard developed protocols for the Rhode Island Public Transit Authority customer service team to connect callers with local transportation resources when fixed-route bus solutions are not available. See Figure 10.

Figure 10: RIPTA Customer Service Decision Tree (Draft)
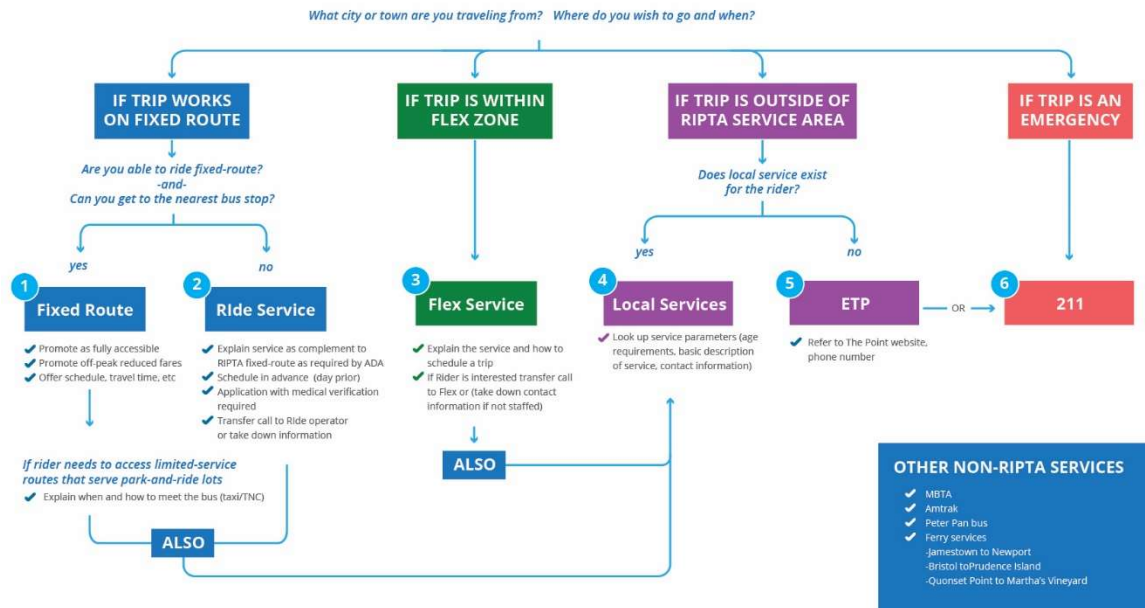
Strategy: Integrate Transportation Demand Management and Mobility Management

Transportation demand management (TDM) aims to reduce the use of single-occupant vehicles in a range of situations. Most programs focus on commuting trips by offering information, incentives, and other resources that help to reduce parking demand and peak-period congestion. TDM programs have led to the establishment of transportation management associations (TMAs) and employer-based commute coordinators. This strategy aims to capitalize on existing TDM programs and staff to integrate mobility management.

Practically, this means that TDM professionals would become well versed in and participate in mobility management activities. For example, a hospital-based TDM professional may primarily focus on encouraging employees to carpool, bike or walk to work, or take public transportation. Integrating mobility management might mean supporting job seekers in finding transportation options to be able to work for the hospital or helping patients and visitors travel to the hospital.

In 2021, the North Jersey Transportation Planning Authority published a TDM and Mobility Plan.[11] The plan's introduction states, "While TDM has traditionally focused on reducing vehicle travel, its scope has expanded in recent years to more directly address bicycle and pedestrian safety, environmental education, and improving mobility for seniors, people with disabilities, low-income residents, and others who may lack access to personal transportation."

Further research is needed into the status of the CAMPO region's TDM program activities, which like many other programs has been impacted by the COVID pandemic. This research will help to identify opportunities to integrate TDM and mobility management.

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[11] https://www.njtpa.org/NJTPA/media/Documents/Planning/Regional-Programs/Studies/Transportation%20Demand%20Management%20and%20Mobility%20Stud/NJTPA-TDM-Mobility-Final-Report.pdf?ext=.pdf

Appendix A

City of Wilmington, Ohio Mobility Manager Job Description

The City of Wilmington, Ohio, is seeking a full-time Mobility Manager within the Wilmington Transit Department. The Mobility Manager plans, develops, implements, and promotes a comprehensive transportation plan, which coordinates, educates, supports, conducts outreach, and provides contract oversight on the service delivery of a variety of transit modes and options that best respond to and influence the needs of the disabled, older adults, and low-income residents Clinton County.

Essential Job Functions

Plans, develops, implements, supports, and promotes a transportation plan focusing on transportation needs for disabled, older adults, and low-income residents; coordinates human service and service delivery of a variety of transportation methods and options that includes private operators, public transit, cycling, walking, volunteer drivers, and other modes of transit; develops and administers new programs to support coordinated transportation; identifies short and long term planning needs and develops programs and strategies to implement planning efforts.

Collaborates with other city departments, local officials, outside governmental agencies, tasks forces, action groups, community-based organizations, local business, and general public to deliver the transit options that best meet the Clinton County community's needs; facilitates regular meetings with transportation providers in order to develop collaborative tactics to improve regional mobility; attends local interest group meetings to explain Clinton County transportation services and develop and implement other marketing and community awareness programs designed to increase a positive consumer consciousness of transportation services; conducts outreach to educate the community and transportation providers and to identify and fulfill unmet needs.

Acts as "Grant Manager" for funding through the Elderly Individuals with Individuals with Disabilities (Section 5310) Program and the Rural Transit Program (Section 5311) transportation grants as well as actively pursues other grants and funding opportunities such as Medicare and Medicaid Transportation; participating in the bidding out of contract services; provides contract oversight on grants and service delivery activities governing the delivery of transportation services; ensures the completion and timely submittal of all local, state, and federal grant reports.

Develops and updates marketing and regularly evaluates and updates county transportation resource information including resource manuals and brochures for distribution; creates maps, graphs, web-sites, and other displays to develop public education and awareness; collects data from primary transportation providers in the county and prepare reports of the data collected for trends or gaps in service; conducts surveys of the number of rides and ridership demographics, including number of persons with disabilities, purpose of ride, income level, age, gender, and family composition and provides reports to City Council, outside agencies, and other interest groups.

Responds to questions and inquiries from City officials, key stakeholders, and general regarding transportation services; builds relationships with transportation providers and with customers; provides information, assistance, referrals, broker trips and education to any county resident on transportation services.

Prepares department's annual budget; monitors budget expenditures and takes appropriate actions to modify services so that budgets are not exceeded; orders department supplies, equipment, and other necessary materials when needed and approves purchase orders.

Attends conferences to educate and network with other professionals to gain knowledge of programs to enhance mobility managements activities; serves on committees, as directed; attends training and seminars, as directed.

Demonstrates regular and predictable attendance; may be required to work extra hours, evening hours, weekends and/or holidays as necessary; due to the nature of the job, when scheduled for on-call assignment, the Mobility Manager must be available to return to work after normal work hours or on weekends and/or holidays when called to do so.

Qualifications

Bachelor's degree from an accredit college or university with major course work in Transportation, Community Planning, Project Management, Business or Public Administration or related field and two (2) years recent documented work experience in program management, transportation, human services case management and planning activities; or any equivalent combination of education, experience, and training which provides the required knowledge, skills, and abilities.

The starting base salary will be consistent with the City's approved pay plan; this position's starting salary is $24.34 per hour.

**The Mobility Manager position is a grant-funded position which is time-limited and contingent upon sufficient funding. In the event the grant is not renewed, this position would be eliminated.

APPENDIX D: FRAMEWORK RECOMMENDATIONS EXPLAINED

The excerpts presented below are based on materials prepared for Task 6: Recommended Implementation Framework & Associated Transit Service Impacts.

RECOMMENDATIONS

Organization Structure and Location

Recommendation: The MMP 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).

In the CAMPO region, GoWake Access is the largest rural transit provider and Wake County, which makes up the bulk of the CAMPO study area, could house the MMP. However, the remaining counties in the study area might not wish to participate in a program that is operated by another county. This can be discussed among the TSC.

Given CAMPO's role in regional transportation planning, its connection to the Wake Transit Plan, its current role facilitating the MCC, and its broader focus, the team recommends housing the MMP within CAMPO.

Update: As the joint GoRaleigh/GoWake Access paratransit operations center advances into development, should the mobility manager become increasingly involved in operations, the mobility manager could potentially be housed in the new facility, either as an employee of Wake County or the City of Raleigh.

Governance

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

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.

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 [strategies and implementation steps] call for the mobility manager to report progress every six months. Should the partner interest indicate additional staffing resources are needed for the program, then the MCC should prepare a request and advocate for more resources or modify the scope of the mobility manager's portfolio.

Funding and Budget

Recommendation: Initial MMP funding should be from FTA Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) resources. 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.

STRATEGY FOCUS AREAS

Improving Access to Information

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

- Become well versed in 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 and overlaps.

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.
- 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 and/or programs requiring additional coordination.
- Develop recommendations for establishing consistency among providers for information referrals including websites and customer service protocols.
- Evaluate the need for a transportation brochure or information clearinghouse 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.

TRANSIT AGENCY PARTICIPATION CONSIDERATIONS

As part of Task 6, an analysis of potential transit service impacts of the MMP was performed. The following discussion covered policy considerations, staffing, agency websites, client referrals, and general benefits.

Existing Agency Policies and Operating Resources Will Not Be Impacted

- Each transit provider will 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 will come from FTA Section 5310 funds and agency operating funds will not be sought to establish the MMP.

Some Staffing Commitments Would be Needed

- Each provider would be expected to commit limited staff resources to continue to participate in and support the goals and activities of the MCC and to meet with and collaborate with MMP staff. This would likely require more time during startup and less time once the program is established.

Updates to Agency Websites and Customer Service Protocols Will Likely be Required

- To address customers' transportation needs beyond currently published information, each agency as a best practice should look to collaborate with the other agencies to modify 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. For further information, contact [mobility management website or phone number]."
- Agencies will likely need to revise their procedures for the customer service team to refer appropriate inquiries to MMP staff.

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 lead to additional fixed-route riders. 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.
- 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 service more often.
- 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 coordination 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.

APPENDIX E: SAMPLE COORDINATION BYLAWS

Paratransit Advisory and Planning Committee Bylaws

Article 1: Definitions

1.1 2000 Transportation Expenditure Plan. The plan for expending Transportation sales tax (Measure B) funds, presented to the voters in 2000, and implemented in 2002.

1.2 2014 Transportation Expenditure Plan. The Plan for expending transportation sales tax (Measure BB) funds, presented to the voters in 2014, and implemented in 2015.

1.3 Alameda County Transportation Commission (Alameda CTC). Alameda CTC is a joint powers authority resulting from the merger of the Alameda County Congestion Management Agency ("ACCMA") and the Alameda County Transportation Improvement Authority ("ACTIA"). The 22-member Alameda CTC Commission ("Commission") is comprised of the following representatives:

1.3.1 All five Alameda County Supervisors.

1.3.2 Two City of Oakland representatives.

1.3.3 One representative from each of the other 13 incorporated cities in Alameda County.

1.3.4 A representative from Alameda-Contra Costa Transit District ("AC Transit").

1.3.5 A representative from San Francisco Bay Area Rapid Transit District ("BART").

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1.4 Alameda County Transportation Improvement Authority (ACTIA). The governmental agency previously responsible for the implementation of the Measure B half-cent transportation sales tax in Alameda County, as approved by voters in 2000 and implemented in 2002. Alameda CTC has now assumed responsibility for administration of the sales tax.

1.5 ADA Eligible Person. A person with disabilities who is eligible for Americans with Disabilities Act (ADA) paratransit services within the legal requirements of the ADA. The general definition of an ADA-eligible individual is a person who is unable, due to disability, to utilize regular fixed-route transit services.

1.6 Appointing Party. A person or group designated to appoint committee members.

1.7 Bicycle and Pedestrian Advisory Committee (BPAC). The Alameda CTC Committee that involves interested community members in the Alameda CTC's policy, planning, and implementation efforts related to bicycling and walking.

1.8 Brown Act. California's open meeting law, the Ralph M. Brown Act, California Government Code, Sections 54950 *et seq.*

1.9 Consumer. Any individual who uses any public transportation services available in Alameda County for seniors and people with disabilities. Consumers may or may not be eligible for services mandated under the Americans with Disabilities Act.

1.10 Coordination/Gaps in Service Funds (Tier 1). Discretionary funding available under Measure B on a countywide basis for gaps in the special transportation service network and/or for coordination among systems to reduce differences in service that might occur based on the geographic residence of any individual needing special transportation services for seniors and people with disabilities. Comprising 1.43 percent of overall net Measure B revenues, subject to approval by the Commission.

1.11 Fiscal Year. July 1 through June 30.

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1.12 Independent Watchdog Committee (IWC or "Committee"). The Alameda CTC Committee of individuals created by the Commission as required by Measure BB, with the assistance of the League of Women Voters and other citizens groups. This Committee was originally created by the ACTIA Board and called the Citizens Watchdog Committee as required by Measure B, and was continued by the Commission subsequent to the passage of Measure BB as the Independent Watchdog Committee. The Committee is the same committee as the Citizens Watchdog Committee required by Measure B. The Committee reports directly to the public and is charged with reviewing all Measure B expenditures and Measure BB expenditures and performance measures of the agency, as appropriate. IWC members are private citizens who are not elected officials at any level of government, nor individuals in a position to benefit personally in any way from the sales tax.

1.13 Mandated Services. Paratransit services mandated by the Americans with Disabilities Act (ADA), also known as "ADA Paratransit." These services are provided by regular route transit operators, including AC Transit and BART, acting together as the East Bay Paratransit Consortium, as well as Union City Transit and LAVTA.

1.14 Measure B. The measure approved by the voters authorizing the half-cent sales tax for transportation services now collected and administered by the Alameda CTC and governed by the 2000 Transportation Expenditure Plan. Collections for the sales tax authorized by Measure B will be in effect for 20 years, beginning on April 1, 2002 and extending through March 31, 2022.

1.15 Measure BB. The measure approved by the voters authorizing the sales tax for transportation services collected and administered by the Alameda CTC and governed by the 2014 Transportation Expenditure Plan. Measure BB augments the half-cent Measure B sales tax by a half-cent, beginning April 1, 2015 through March 31, 2022. The full one-cent sales tax authorized by Measure BB will begin April 1, 2022 and will extend through March 31, 2045.

1.16 Organizational Meeting. The annual regular meeting of the PAPCO in preparation for the next fiscal year's activities.

1.17 Measure B Program. The transportation or transportation-related program specified in the 2000 Transportation Expenditure Plan for funding transportation programs and projects on a percentage-of-revenues or grant allocation basis.

1.18 Measure B Project. Transportation and transportation-related construction projects specified in the 2000 Transportation Expenditure Plan for funding in the amounts allocated in the 2000 Transportation Expenditure Plan.

1.19 Measure BB Program. Transportation or transportation-related program specified in the 2014 Transportation Expenditure Plan for funding transportation programs and projects on a percentage-of-revenues or grant allocation basis.

1.20 Measure BB Project. Transportation and transportation-related capital projects specified in the 2014 Transportation Expenditure Plan for funding in the amounts allocated in the 2014 Transportation Expenditure Plan.

1.21 Non-mandated Services. Special transportation services, including paratransit that are not subject to the requirements of the Americans with Disabilities Act. In Alameda County, Measure B and Measure BB funds are provided to the cities and the County of Alameda for non-mandated services. Examples of non-mandated services include, but are not limited to, shuttle service, taxi programs and special group trips.

1.22 Paratransit Advisory and Planning Committee (PAPCO or "Committee"). The Alameda CTC Committee that meets to address funding, planning, and coordination issues regarding paratransit services in Alameda County. Members must be an Alameda County resident and an eligible user of any transportation service available to seniors and people with disabilities in Alameda County. PAPCO is supported by a

Technical Advisory Committee composed of Measure B and Measure BB-funded paratransit providers in Alameda County.

1.23 Planning Area. Geographic groupings of cities and of Alameda County for planning and funding purposes. North County: Alameda, Albany, Berkeley, Emeryville, Oakland, Piedmont; Central County: Hayward, San Leandro, unincorporated county (near Hayward); South County: Fremont, Newark, Union City; East County: Dublin, Livermore, Pleasanton, the unincorporated area of Sunol.

1.24 Programmatic Funding. Measure B and Measure BB revenues distributed on a monthly basis based on a distribution formula, also referred to as "Direct Local Distribution" funds. Approximately 5.63 percent and 6 percent of net Measure B and Measure BB revenues, respectively, are distributed to AC Transit and BART for ADA-mandated paratransit service. Approximately 3.39 percent and 3 percent of net Measure B and Measure BB revenues, respectively, are distributed within the four planning areas for ADA-mandated and city-based, non-mandated specialized transportation services based on a formula developed by PAPCO and approved by the Commission.

1.25 Residents with Disabilities. Alameda County residents who have physical or mental impairments that substantially limit one or more of the major life functions—caring for oneself, performing manual tasks, walking, seeing, hearing, breathing, learning, working—of an individual. Residents with disabilities are eligible for ADA-mandated paratransit services if their disabilities prohibit them from using regular fixed route transit.

1.26 Special Transportation. Transportation services for seniors and people with disabilities, aimed at improving the mobility of seniors and people with disabilities by supplementing conventional fixed-route transit service. Examples of special transportation services may include, but are not limited to, paratransit, local shuttles, and subsidized taxi programs.

1.27 Paratransit Technical Advisory Committee (ParaTAC). A committee of Measure B and Measure BB service providers of mandated and non-mandated services. The Paratransit Technical Advisory

Committee will meet in joint session with PAPCO at least three times per year, and may meet independently at other times to discuss issues of relevance to service providers.

1.28 Tier 2 Funds. Additional funds that may be available for capital expenditures over the life of the 2000 TEP sales tax measure. These funds are not guaranteed; however, should they become available, up to $7.5 million dollars would be allocated to coordination of service gaps and special transportation for seniors and persons with disabilities. These funds would be recommended for allocation by PAPCO to reduce differences in service that might occur based on the geographic residence of any individual needing specialized transportation services for seniors and people with disabilities, subject to approval by the Commission.

1.29 Vehicle Registration Fee (VRF). A $10 fee imposed on each annual motor vehicle registration or vehicle registration renewal in Alameda County. Measure F approved by Alameda County voters in 2010, is collected and administered by the Alameda CTC.

Article 2: Purpose and Responsibilities

2.1 Committee Purpose. The Committee purpose is to fulfill the functions mandated for the Committee in the 2000 and 2014 Expenditure Plans and to advise the Alameda CTC on matters related to special transportation.

2.2 Committee Roles and Responsibilities from 2000 and 2014 Transportation Expenditure Plans. As defined by the 2000 and 2014 Transportation Expenditure Plans, the roles and responsibilities of the Committee are to:

2.2.1 Develop the formula use to distribute Measure B and Measure BB programmatic funds to the cities in Alameda County and the County of Alameda for mandated and non-mandated special transportation services, subject to approval by the Commission.

2.2.2 Recommend allocation of funds identified for coordination/gaps in service in Tier 1 of the 2000 Transportation Expenditure Plan, subject to approval by the Commission.

2.2.3 Recommend allocation of funds identified for capital expenditures for coordination/gaps in service in Tier 2 of the 2000 Transportation Expenditure Plan, assuming funds are available for allocation, subject to approval by the Commission.

2.3 Additional Responsibilities. Additional PAPCO member responsibilities are to:

2.3.1 Review performance data of mandated and non-mandated services, including cost-effectiveness and adequacy of service levels, with the objective of creating a more cost-efficient, productive and effective service network through better communication and collaboration of service providers. In this capacity, the Committee may identify and recommend to the Alameda CTC alternative approaches that will improve special transportation service in Alameda County.

2.3.2 Report annually on the status of special transportation services, including service availability, quality, and improvements made as compared to the previous year.

2.3.3 Provide a forum for consumers to discuss common interests and goals affecting all special transportation services funded in whole or in part by Measure B and Measure BB funds in Alameda County.

2.3.4 Encourage coordination of special transportation and public transit services as they relate to seniors and individuals with disabilities in Alameda County.

2.3.5 Participate in surveys and planning activities undertaken by various public agencies as they relate to seniors and individuals with disabilities in Alameda County.

2.3.6 Fulfill all responsibilities as the County Paratransit Coordinating Council (PCC), as assigned by the Metropolitan Transportation Commission, the County, the state or the federal government.

2.3.7 Perform outreach regarding Alameda CTC activities related to transportation for seniors and people with disabilities at least once each fiscal year. Examples of outreach may include attending a transit or senior fair, accompanying staff to Alameda CTC outreach presentations, or publishing an article in a local publication.

Article 3: Members

3.1 Number of Members. The PAPCO will consist of 23 members.

3.2 Appointment. The Commission will make appointments in the following manner:

3.2.1 One member per County Supervisor (five total).

3.2.2 One member per City (14 total).

3.2.3 One member per Transit Agency–AC Transit, BART, LAVTA, and Union City.

3.3 Membership Qualification. Each member must be an Alameda County resident and a special transportation consumer.

3.4 Membership Term. Appointments shall be for two-year terms. There is no maximum number of terms a member may serve. Members shall serve until the Commission appoints their successor.

3.5 Attendance. Members are expected to actively support committee activities and regularly attend meetings. Accordingly, more than three consecutive absences in any fiscal-year period may be cause for removal from the Committee.

3.6 Termination. A member's term shall terminate on the occurrence of any of the following:

3.6.1 The member voluntarily resigns by written notice to the chair or Alameda CTC staff.

3.6.2 The member fails to continue to meet the qualifications for membership, including residency and attendance requirements.

3.6.3 The member becomes incapable of continuing to serve.

3.6.4 The appointing party or the Commission removes the member from the Committee.

3.7 Vacancies. An appointing party shall have the right to appoint a person to fill the vacant member position, subject to the ability of the person to meet the requirements to serve on the committee and approval of the Commission. Alameda CTC shall be responsible for notifying an appointing party of such vacancy and for urging expeditious appointment of a new member, as appropriate.

Article 4: Officers

4.1 Officers. The PAPCO shall annually elect a chair and vice chair. Each officer must be a duly appointed member of the PAPCO.

4.1.1 Duties. The chair shall preside at all PAPCO meetings except when the PAPCO discusses the chair position and/or nomination. The chair will represent the PAPCO before the Commission to report on PAPCO activities. The chair shall serve as an ex-officio member of all subcommittees. The vice chair shall assume all duties of the chair in the absence of, or on the request of the chair. In the absence of the chair and vice chair at a meeting, the members shall, by consensus, appoint one member to preside over that meeting. In addition, if MTC convenes Paratransit Coordinating Council (PCC) meetings, the PAPCO chair or his/her designee will attend and report back to PAPCO on these meetings.

4.2 Office Elections. Officers shall be elected by the members annually at the Organizational Meeting or as necessary to fill a vacancy. An individual receiving a majority of votes by a quorum shall be deemed to have been elected and will assume office at the meeting following the election. Officers shall be eligible for re-election indefinitely.

4.3 Elected Representatives. PAPCO shall biennially ~~annually~~ elect a representative to serve on AC Transit and BART's East Bay Paratransit Service Review Advisory Committee (SRAC). This representative will attend SRAC meetings, report on PAPCO activities to the SRAC, and report to the full membership of PAPCO on SRAC activities. This representative must be a consumer of East Bay Paratransit's services. PAPCO shall biennially ~~annually~~ elect a representative to serve on Alameda CTC's Independent Watchdog Committee (IWC). This representative will attend IWC meetings, report on PAPCO activities to the IWC, and report to the full membership of PAPCO on IWC activities.

Article 5: Meetings

5.1 Open and Public Meetings. All PAPCO meetings shall be open and public and governed by the Brown Act. Public comment shall be allowed at all PAPCO meetings. Comments by a member of the public in the general public comment period or on any agenda item shall be up to 3 minutes per speaker at the discretion of the chair. The number of PAPCO meetings, including regular meetings, sub-committee meetings, and special meetings, will be limited to the number of meetings approved in Alameda CTC's annual overall work program and budget, as approved by the Commission.

5.2 Regular Meetings. The PAPCO will hold up to 10 meetings per year. Annually, at the Organizational Meeting, PAPCO shall establish the schedule of regular meetings for the ensuing year. Meeting dates and times may be changed during the year by action of PAPCO. On a quarterly basis, PAPCO is expected to meet jointly with the Paratransit Technical Advisory Committee (ParaTAC) of paratransit providers. ParaTAC members will not have voting privileges at these joint meetings,

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but may engage in all discussions and may present their point of view prior to any decision-making at those meetings.

5.3 Quorum. For purposes of decision making, a quorum shall consist of at least half (50 percent) plus one of the total number of members appointed at the time a decision is made. No actions will be taken at meetings with less than 50 percent plus one member present. Items may be discussed and information may be distributed on any item even if a quorum is not present; however, no action can be taken, until the Committee achieves a quorum.

5.4 Special Meetings. Special meetings may be called by the chair or by a majority of the members on an as-needed basis. Attendance at special meetings is not counted as part of members' attendance requirement. Agenda item(s) for special meeting(s) shall be stated when the meeting is called, but shall not be of a general business nature. Specialized meetings shall be concerned with studies, emergencies, or items of a time-urgent nature. Agenda item(s) of a regular meeting may be tabled for further discussion and action at a special meeting, the time and location to be announced in the tabling motion. Notice of such meetings shall be given to all members at least 72 hours prior to such meetings and shall be published on the Alameda CTC's website and at the Alameda CTC office, all in accordance with the Brown Act.

5.5 Agenda. All meetings shall have a published agenda. Action may be taken only on items indicated on the agenda as action items. Items for a regular meeting agenda may be submitted for consideration by any member to the chair and Alameda CTC staff. The Commission and/or Alameda CTC staff may also submit items for the agenda. Every agenda shall include provision for members of the public to address the Committee. The chair and the vice chair shall review the agenda in advance of distribution. Copies of the agenda, with supporting material and the past meeting minutes, shall be mailed to members and any other interested parties upon request. The agenda shall be posted on the Alameda CTC website and office and provided at the meeting, all in accordance with the Brown Act.

5.6 Roberts Rules of Order. The rules contained in the latest edition of "Roberts Rules of Order Newly Revised" shall govern the proceedings of the PAPCO and any subcommittees thereof to the extent that the person presiding over the proceeding determines that such formality is required to maintain order and make process, and to the extent that these actions are consistent with these bylaws.

5.7 Place of Meetings. PAPCO meetings shall be held at the Alameda CTC offices, unless otherwise designated by the Committee. Meeting locations shall be within Alameda County, accessible in compliance with the Americans with Disabilities Act of 1990 (41 U.S.C., Section 12132) or regulations promulgated there under, shall be accessible by public transportation, and shall not be in any facility that prohibits the admittance of any person, or persons, on the base of race, religious creed, color, national origin, ancestry, or sex, or where members of the public may not be present without making a payment or purchase.

5.8 Meeting Conduct. PAPCO members shall conduct themselves during meetings in a manner that provides a welcoming and safe environment for all attendees characterized by an atmosphere of mutual trust and respect. Members shall work with each other and staff to respectfully, fairly, and courteously deal with any conflict between attendees.

Article 6: Subcommittees

6.1 Establishment. The PAPCO may establish subcommittees subject to the approved Alameda CTC overall work program and budget as approved by the Commission to conduct an investigation or draft a report or other document or recommendation within the authority of PAPCO.

6.2 Membership. PAPCO members will be appointed to subcommittees by PAPCO, on a voluntary basis, or by the chair. No subcommittee shall have fewer than three members, nor will a subcommittee have greater than the number of members needed to constitute a quorum of PAPCO.

Article 7: Records and Notices

7.1 Minutes. Minutes of all meetings, including actions and the time and place of holding each meeting, shall be kept on file at the Alameda CTC office.

7.2 Attendance Roster. A member roster and a record of member attendance shall be kept on file at the Alameda CTC office.

7.3 Brown Act. All PAPCO meetings will comply with the requirements of the Brown Act. Notice of meetings and agendas will be given to all members and any member of the public requesting such notice in writing and shall be posted at the Alameda CTC office at least 72 hours prior to each meeting. Members of the public may address PAPCO on any matter not on the agenda and on each matter listed on the agenda, in compliance with the Brown Act and time limits, up to three minutes per speaker, set at the discretion of the chair.

7.4 Meeting Notices. On March 28, 2013, the Alameda CTC Commission approved the implementation of paperless meeting packet distribution. Hard copies are available by request only. Agendas and all accompanying staff reports are available electronically on the Alameda CTC website at www.AlamedaCTC.org/events/month/now. Any other notice required or permitted to be given under these bylaws will follow the same policy. PAPCO members receive an exception to the paperless policy and will continue to receive notices via U.S. Postal Service in addition to electronic versions. Members can request to opt-out of paper notices.

Article 8: General Matters

8.1 Per Diems. Committee members shall be entitled to a per diem stipend for meetings attended in amounts and in accordance with policies established by the Alameda CTC.

8.2 Conflicts of Interest. A conflict of interest exists when any Committee member has, or represents, a financial interest in the matter before the Committee. Such direct interest must be significant or personal. In the event of a conflict of interest, the Committee member shall declare the conflict, recuse him or herself from the discussion, and shall not vote on that item. Failure to comply with these provisions shall be grounds for removal from the Committee.

8.3 Bylaws. Bylaws governing the meetings and activities of PAPCO are approved by the Alameda CTC.

8.4 Public Statements. No member of the Committee may make public statements on behalf of the Committee without authorization by affirmative vote of the Committee, except the chair, or in his or her place the vice chair, when making a regular report of the Committee activities and concerns to the Alameda CTC.

8.5 Conflict with Governing Documents. In the event these bylaws conflict with the 2000 Transportation Expenditure Plan, the 2014 Transportation Expenditure Plan, California state law, or any action lawfully taken by ACTIA or the Alameda CTC, the conflicting provision in the Transportation Expenditure Plans, state law, or the lawful action of ACTIA or the Alameda CTC shall prevail.

8.6 Staffing. Alameda CTC will provide staffing to the Committee including preparation and distribution of meeting agendas, packets, and minutes; preparation of reports to the Alameda CTC Committees and Commission; tracking of attendance; and per diem administration.

MARIN ACCESS

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BYLAWS

PARATRANSIT COORDINATING COUNCIL

Marin County, California

Revised:
November,   1995
December,   1997
December,   2002
November,   2009
        May,   2011
November,   2016

BYLAWS

OF THE

MARIN COUNTY PARATRANSIT COORDINATING COUNCIL (PCC)

ARTICLE I NAME

Section 1. The name of this organization shall be the Marin County Paratransit Coordinating Council (PCC) hereinafter called PCC.

ARTICLE II   PURPOSE

Section 1. The purpose of the PCC is to advise the Board of Supervisors, Metropolitan Transportation Commission, Association of Bay Area Governments, Marin County Transit District, CALTRANS, Golden Gate Bridge, Highway & Transportation District, and other appropriate funding sources in the expenditure of all available revenues and to improve the availability of transportation services for the special needs population groups. The PCC is to be responsible for the development and implementation of transportation programs designed to solve the transit problems of people with disabilities, elderly, and other transit dependents in coordination and cooperation with appropriate public private and non-profit agencies, and paratransit operators within the established boundaries of Marin County.

ARTICLE III   FUNCTION

Section 1. The PCC shall work to increase cooperation, coordination, and the availability and effectiveness of special transportation services within Marin County, to include but not be limited to minimizing overlap and duplication in the use of resources at the planning, policy management, and service delivery levels.

Section 2. The PCC shall review all paratransit proposals submitted requesting Federal, State, and/or local transit monies and make recommendations on these proposals to the Marin County Transit District, Golden Gate Bridge Highway & Transportation District, Sonomoa-Marin Area Rail Transit, Marin County paratransit operators, the Metropolitan Transportation Commission, appropriate County of Marin agencies and departments and other appropriate funding agencies.

Section 3. The PCC shall be a forum for the discussion of common goals and recommended actions affecting all paratransit services throughout Marin County. This coordination is intended to result in increased utilization of transit services and reduced costs, by means of shared vehicles, joint maintenance, insurance pooling, central scheduling and dispatching, coordinated fare structure, and other coordinated actions.

Section 4. The PCC shall develop an annual work program and shall encourage the use and development of appropriate transit services for those who are transit dependent; channel input and suggestions to existing paratransit services in the County; keep informed of the needs of transit dependent people.

Section 5. The PCC shall be available to advise groups and/or agencies applying for Federal, State, and/or other appropriate funds for paratransit services; continue to be aware of potential funding sources; disseminate transportation information to as wide an audience as possible within the County and at the same time will coordinate with other groups which have a local and/or regional interest in transportation.

ARTICLE IV   MEMBERSHIP

Section 1. The PCC and its voting members shall consist of representatives of transportation providers, representatives of human service

agencies, consumers of transit services, agencies, organizations and individuals, whose interests are consistent with the purpose of the PCC. The PCC shall seek a balance in this representation.

Section 2. Each participating agency, organization, and/or individual shall name its representative and may designate one alternate. Each member of the PCC shall have one vote. An alternate may serve on committees and shall assume that right to vote when acting on behalf of the member representative. Alternates may only represent designated members for one fourth (1/4) the number of regularly scheduled meetings, as defined in Article VII, Section 1.

Section 3. Organizations, agencies and individuals wishing to become voting members of the PCC shall submit an application to the chairperson of the PCC. Membership applications may be submitted at any time. Additions and deletions to the voting membership roster must be made at a regular meeting by a majority vote of at least a quorum present and voting.

Section 4   Included in the composition of the PCC as ex-officio nonvoting members are:

(a) California Department of Transportation (CALTRANS)
(b) Metropolitan Transportation Commission (MTC)
(c) Golden Gate Bridge Highway & Transportation District
(d) Marin County Transit District

Section 5. Members, who have three (3) unexcused absences from regularly scheduled meetings during any one calendar year may be removed as voting members of the PCC. After two unexcused absences the individual, or the agency represented by that member, shall receive a warning notification that upon a third unexcused absence, the membership will be terminated. Organizations, agencies, or individuals wishing to be reinstated as voting members of the PCC shall follow the procedure

described in Article IV, Section 3. Excused absences can be granted by the Chairman or Staff after notification of the member's inability to attend. In emergency situations, subsequent notification within one week of the meeting date is acceptable.

ARTICLE V   OFFICERS

Section 1. Elective Officers

(a)   Elective officers shall be chairperson a vice-chairperson, and a secretary.

Section 2. Procedures for Election of Officers

(a)   The nominating committee shall present a slate of nominees at the general meeting occurring in October or November each election year.

(b)   Nominations may be made from the floor with the consent of the nominee, at the next meeting following the October or November general meeting, after which the nominations shall be closed.

(c)   The PCC shall hold its election of officers by voice ballot each election year at the next regular general meeting that follows the October or November general meeting. Newly elected officers shall assume office at the next regular meeting.

Section 3. Duties of Elective Officers

(a)   It shall be the duty of the chairperson to preside over all meetings of the PCC, and to appoint chairpersons of standing committees and any other committee as shall be necessary.

(b)   It shall be the duty of the vice-chairperson to assist the chairperson in the execution of that office and to preside at meetings in the absence of the chairperson.

(c) It shall be the duty of the secretary to maintain an accurate attendance list of the voting members, and other duties as designated by the Chair.

Section 4. Term of Office

(a) Officers shall serve for a term of two years. In the occurrence of an officer withdrawing or leaving, the PCC shall fill that position for the remainder of the term by an election to be held at the next meeting following published notice to that effect. In the event there are only three or less meetings, the chairperson can appoint a member to serve out the balance of the term.

ARTICLE VI   COMMITTEES

Section 1. Executive Committee

(a) Shall be composed of the three elective officers, the immediate past Chairperson and chairpersons of all standing committees and shall meet as needed.
(b) Shall recommend policy and transact any business referred to it.
(c) Shall be empowered to take emergency action between general   meetings of the full PCC. Any such actions taken must be ratified at the meeting immediately following the special meeting.

Section 2. Standing Committees

(a) Standing **and ad-hoc** Committees may be appointed at the beginning of the year and shall consist of a Budget Committee to review and make recommendations to the full PCC, a Membership/Bylaws Committee to expand Council membership and review Bylaws, a Consumer Affairs Committee to review issues of complaints, safety, public awareness and outreach, and a Legislative

Committee Grant Review and Nominating Committees shall be appointed when needed.

(b)   Chairpersons of each standing committee shall serve for one year.

ARTICLE VII   MEETINGS

Section 1.   The PCC shall meet bi-monthly on a regularly scheduled basis in addition to any special meetings convened by the chairperson. The Marin County Transit District shall provide staff for council meetings.

Section 2.   The Transit District shall give written notice of each regular meeting of the PCC to each council member in accordance with the Brown Act. Regular meetings must be noticed through the posting of an agenda at least 72 hours before the meeting. Members may request that a copy of the agenda and "all documents constituting the agenda packet" be mailed to them. They will be mailed when the agenda is posted or when it is distributed to a majority of the legislative body, whichever is first. The agency may charge a fee for mailing the materials, not to exceed the cost of providing the mailing service. In the event that a special meeting is called, the Transit District shall give written notice to all council members at least 24 hours in advance of the said meeting. Whenever possible, the Transit District shall also provide for notice of the meetings to the public by publication in newspapers of general circulation in Marin County.

Section 3.   Council members requesting that items be placed on the agenda shall submit such items to the chairperson two weeks prior to a meeting. Each agenda will contain an open time for public expression where unannounced new business may be discussed other than items covered by special meetings (Section 6, Paragraph (c). No action on business may be taken by the PCC however until the next regularly scheduled meeting.

ARTICLE VIII   QUORUM

Section 1. **Fifty (50) percent** of the voting members shall constitute a quorum authorized to transact business duly presented at a meeting of the PCC. In case of a tie vote, the chairperson shall cast the deciding vote.

ARTICLE IX   PARLIAMENTARY PROCEDURE

Section 1. The rules contained in Robert's "Rules of Order" shall govern the proceedings of the PCC to the extent they are not inconsistent with these bylaws.

ARTICLE X   AMENDMENTS CORRECTIONS OR CHANGES IN THE BYLAWS

Section 1. These bylaws may be amended repealed or altered, in whole or in part by a 2/3 majority vote at any duly organized meeting of this PCC provided that a copy of any amendment proposed for consideration shall be mailed to the last recorded address of each member at least fifteen (15) days prior to the date of the meeting.

Section 2. The bylaws should be reviewed annually and revised as needed.

ARTICLE XI   CONFLICT OF INTEREST

Section 1. Members of the PCC who receive compensation from or have a fiduciary interest in any program funded by the Transit District must abstain from voting on funding of that particular program, as per County policy.

Section 2. Members of the PCC who serve as volunteers or members of the Board of Directors of programs funded by the Transit District are requested not to vote on funding of the particular program with which they are involved. This does not preclude any member of the PCC from serving on review committees which consider

funding of programs prior to official vote of the full PCC, except those members cited above who receive compensation from or have a fiduciary interest in programs funded by the Transit District.

Section 3. Determination of Conflict

In the event the member declares the existing conditions relative to a conflict of interest, he/she shall request a ruling on the validity of the conflict of interest, he/she shall request a ruling on the validity of the conflict. A majority of a quorum present shall determine if a conflict of interest does exist. If it does he/she shall be permitted to participate as any other member, but shall not be permitted to vote.

Section 4. Dismissal

Failure to comply with the provisions concerning conflict of interest shall be grounds for the immediate dismissal from the PCC. A motion to dismiss must be adopted by a two-thirds (2/3) vote of the quorum present at that meeting.

BYLAWS
of the
SOLANO PARATRANSIT COORDINATING COUNCIL (PCC)
Revised July 30, 2021

ARTICLE I	**NAME**
Section 1.	The name of this organization shall be the Solano Paratransit Coordinating Council (PCC), hereinafter called Council.
ARTICLE II	**AUTHORIZING AGENCY**
Section 1.	The Solano Transportation Authority (STA) is the authorizing agency for the Paratransit Coordinating Council and shall approve all appointments to the Council and amendments to the Bylaws of the Council.
ARTICLE III	**PURPOSE**
Section 1.	The Council shall serve as an advocate for improved availability of transit services for the older adults, people with disabilities, minorities, economically disadvantaged and other transit dependent persons.
Section 2.	The Council shall advise the Solano Transportation Authority, the Metropolitan Transportation Commission, and other appropriate funding agencies in the expenditure of all available paratransit revenues within Solano County.
Section 3.	The Council shall serve as a forum to bring together the diverse perspectives of those individuals and groups seeking to provide the best possible transportation services for the above designated transit dependent individuals.
ARTICLE IV	**FUNCTION**
Section 1.	The Council shall increase cooperation and coordination in the availability of transportation services by minimizing overlap and duplication in the use of resources at the policy, management, and service delivery levels.
Section 2.	The Council shall review proposals requesting Federal, State and/or local paratransit monies and make recommendations on these proposals to the appropriate funding agencies.
Section 3.	The Council shall provide a forum for discussion of common goals and recommended actions affecting paratransit. This coordination is intended to

result in increased utilization of transit services and reduced costs, by means of shared vehicles, insurance pooling and other coordinated actions.

Section 4.   The Council shall be an advocate for the best possible use of existing transit services and for the provision of new services to address unmet needs for those who are transit dependent. It shall channel input and suggestions to existing paratransit services in the County and keep informed of the special needs of transit dependent people, augmenting the information contained in the Solano County Mobility Management Plan, Short Range Transit Plan; and other plans and studies that address paratransit issues in Solano County.

Section 5.   The Council shall offer assistance to groups and/or agencies applying for Federal, State, and/or other appropriate funds for paratransit services; continue to be aware of potential funding sources; disseminate transportation information to as wide an audience as possible within the County, and at the same time seek to coordinate with other groups which have a regional interest in transportation.

ARTICLE V   MEMBERSHIP

Section 1.   The Council shall be composed of representatives of private, public and nonprofit providers and consumers of transit services whose interests are consistent with the purpose of the Council and who shall represent all communities in the County.

Section 2.   The Council shall consist of a number of representatives from the groups listed below. The number of voting members in each of these categories is indicated in parentheses after the group. In selecting members for the Council every effort will be made to ensure that the needs and perspectives of members of minority groups will be adequately represented.

1) Voting Members (11)
   a) Transit Users (3)
      i) Older Adult (1) (60 or older)
      ii) Person with Disability (1)
      iii) Low Income (1)
   b) Members at Large (2)
   c) Public Agencies (2)
      i) County Department of Health and Social Services (1)
      ii) Education –Related Services (1)
   d) Social Service Providers (3)
      i) Three Council members will be selected from agencies experienced in the provision of services for people with disabilities, older adults, and those in rural areas, including, when possible, social service providers of transportation. Every effort will be made to ensure that the needs and perspectives of both

non-profit and for-profit providers are adequately represented in this section of the Council.

    e) The Policy Advisory Council MTC Advisor for Solano County.

2) Non-Voting Members

Non-voting membership on the Council is intended to ensure that adequate technical information and a wide range of regional and institutional perspectives are available to assist the Council in its deliberations. Membership in this portion of the Council shall include the following:

    a) Solano Transportation Authority Staff
    b) All Solano County Public Transit Agencies
    c) Metropolitan Transportation Commission Staff
    d) Caltrans District 4
    e) County Board of Supervisors Staff

Section 3.	The term of service on the Council shall be three years. A member may continue to serve through reappointment by the STA Board.
Section 4.	Recommendations to the Solano Transportation Authority of appointments to the Council may be made at a regular meeting of the Council by a two-thirds (2/3) vote of those present.
Section 5.	Each participating agency shall name its representative and one alternate; the transit users shall be nominated by the Council and they shall name their own alternates. Each member of the Council shall have one vote. An alternate shall assume that right to vote when acting on behalf of the member representative.
Section 6.	Council members who do not attend three (3) regularly scheduled meetings in succession and do not contact staff to indicate that they will not be present shall have their positions declared vacant. Absence after contacting staff constitutes an "excused absence." Excused and unexcused absences in any one calendar year period shall be documented in the minutes of each meeting. If a Council member has missed a combination of six (6) meetings of excused and unexcused absences, he or she will be sent a written notice of intent to declare the position vacant. If there is no adequate response before or at the next meeting, the position will be declared vacant at that time.

ARTICLE VI   OFFICERS

Section 1.	The Council shall nominate and elect a Chairperson and a Vice-Chairperson every two (2) years. Staff of the Solano Transportation Authority shall be responsible for secretarial functions.

Section 2.	A Nominating Committee, appointed by the current Chairperson, consisting of three (3) members, shall be selected in October of each year. A slate of prospective officers shall be presented to the Council at the December meeting and an opportunity provided for nominations from the floor. The election of officers shall take place at the end of this meeting with the new officers to be seated at the January meeting.
Section 3.	The terms of office of the Chairperson and Vice-Chairperson shall be two (2) years. A minimum of one (1) year must elapse before either of the officers can serve again.
Section 4.	If the Chairperson resigns his/her position, the Vice-Chairperson shall step into the vacated spot and a special nominating committee will appoint a new Vice-Chairperson. Service in this temporary position shall not bar the interim Chairperson from running in a subsequent election for Chairperson.

    a. It shall be the duty of the chairperson to preside over all meetings of the Council, and to appoint committees as necessary.

    b. It shall be the duty of the vice-chairperson to assist the chairperson in the execution of the office and to preside at meetings in the event of the absence of the chairperson.

    c. It shall be the duty of the secretary (STA Staff) to keep a written record of all meetings of the Council and other tasks as appropriate.

ARTICLE VII   MEETINGS

Section 1.	The Council shall call at least six (6) regularly scheduled meetings a year. The meetings will be held the third Thursday of every other month, subject to change.
Section 2	Special meetings may be called at the discretion of the chairperson, or staff, or at least one-third of the membership (requesting such meeting in writing to staff), as necessary.
Section 3.	The secretary shall give written notice of all meetings of the Council to each Council member and others on the approved mailing list prior to the meeting date. At the direction of the Council, when it is deemed appropriate, efforts will be made to provide a broader public notification of meetings.
Section 4.	All meetings shall be public meetings.

ARTICLE VIII   COMMITTEES

Section 1.	Committees shall be constituted at the discretion of the Council to research

issues related to the Council's mission, to carry out short-term defined special activities that support the Council's function and to report their findings and activities back to the Council.

ARTICLE IX   **QUORUM**

Section 1.   A majority of the filled voting member positions shall constitute a quorum authorized to transact any business duly presented at a meeting of the Council.

ARTICLE X   **PARLIAMENTARY PROCEDURE**

Section 1.   The rules contained in Roberts' "Rules of Order", as last revised, shall govern the proceedings of the Council to the extent they are not inconsistent with these Bylaws.

ARTICLE XI   **AMENDMENTS, CORRECTIONS OR CHANGES IN THE BYLAWS**

Section 1.   Recommendations for amendments of these Bylaws, in whole or in part, may be made by a majority vote at any duly organized meeting of this Council, provided that a copy of any amendment proposed for consideration shall be transmitted to each member at least thirty (30) days prior to the date of the meeting. Any changes are subject to approval by the STA Board.

ARTICLE XII   **CONFLICT OF INTERESTS**

Section 1.   No member of the Council shall make, participate in making, or use his/her official position as a member to influence a Council decision in which he/she has a financial interest or a conflict of interest. A conflict of interest shall include, but is not limited to, a Council member's membership in or affiliation with any organization which benefit from any action under consideration by the Council.

Section 2.   Letters written by the Council that are directed outside the STA must be reviewed by the Executive Director and if in the opinion of the Executive Director, the contents and intent of the letter is either non-controversial or consistent with Board policies, the letter will be sent out. In all other cases the letter must be reviewed by legal counsel and approved by the STA Board action.

APPENDIX F: MOBILITY MANAGER JOB DESCRIPTION

INTRODUCTION

The following job description focuses on the position summary, essential duties, and minimum qualifications. It is assumed that the formal job posting will follow CAMPO's other position announcements.

JOB SUMMARY

The CAMPO region's mobility manager will support the implementation, growth, and evolution of a regional mobility management program (MMP), which aims to deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The position involves:

- Engagement, outreach, and coordination activities to offer consistent and easily accessible information on available public transportation services,

- Ongoing data collection, analysis, and reporting to identify trends, clarify needs, and recommend ideas that address the concerns of people who face mobility challenges, and

- Support for efforts to coordinate travel, through stronger collaboration and the potential use of technology.

ESSENTIAL DUTIES

- Collaborate and meet regularly with the region's Mobility Coordination Committee (MCC)

- Collaborate and meet regularly with each transportation provider's designated liaison

- Regularly visit provider operations staff to understand day-to-day operations, primarily for demand-response transportation

- Understand and maintain current information on each provider's fixed-route and demand-response transportation services, including eligibility criteria, service characteristics for inclusion in a centralized sharable database

- Identify other potential agency and organization entities with a potential interest in mobility management

- Create a regional mobility management brand and identity and use for all emails, publicity, and related collateral; conduct follow-up surveys on brand awareness
- Develop collateral materials, content for social media, and other outreach
- Participate in ongoing transportation planning activities such as meetings and events; lead and/or assist with the preparation of the regional Coordinated Public Transit–Human Services Transportation Plan and other coordination activities
- Develop a strategy for serving as a direct contact for transportation referrals, including development of a mobility management webpage
- Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance)
- Become knowledgeable about travel training, local available training resources, and strategies for developing a network of trainers
- Identify opportunities for trip coordination among rural providers
- Conduct outreach to a broader network of agencies, organizations, and individuals involved with or interested in mobility management
- Collaborate with other regional and state agencies
- Maintain records, prepare periodic reports, and give presentations

QUALIFICATIONS

Knowledge, Skills, and Abilities

- Knowledge of public transportation programs and requirements
- Must be well organized and able to multitask
- Ability to perform short- and long-term strategic planning
- Ability to establish and maintain effective working relationships with public transportation agency staff, contracted providers, human services agencies, municipalities, county and state officials, employees, other departments, and the public
- Ability to work effectively with diverse populations
- Ability to communicate effectively in oral and written forms
- Ability to organize information and prepare reports
- Ability to work with Microsoft Office suite and to develop maps and graphics

Desirable Education and Experience

- Bachelor's degree in urban planning, civil engineering, social work, public administration, or related field and 5–8 years or more of related experience
- Substantive knowledge of and interest in related fields such as public transportation, community development, and planning

Conditions of CAMPO Employment:

Requires drug testing and background check (which may include criminal check, education verification, and credit history review) prior to employment.

Requires a valid driver's license with an acceptable driving record.

Physical Requirements

Work in this class is generally sedentary and typically performed indoors. An employee must be able to move throughout facilities freely to perform and/or observe work. An employee must have visual acuity to be able to read and write handwritten and typewritten materials, including being able to view a computer screen. An employee must have the ability to occasionally work safely in and around traffic and active construction sites. An employee in this class must be able to talk and hear to be able to communicate and respond to the public and other employees.

APPENDIX G: MOBILITY MANAGER WORK PROGRAM

ASSUMPTIONS

The draft work program for the mobility manager is based on the following assumptions:

- A full-time professional will be hired as the CAMPO region's mobility manager (MM)

- The MM will be an employee of CAMPO and receive benefits according to CAMPO's employee benefits package

- The MM will follow CAMPO's employee policies, etc.

- The MM will seek, and the region's Mobility Coordination Committee will provide guidance according to a schedule to be determined (e.g., bimonthly)

- For administrative purposes such as reviewing and approving time sheets and expense reports, participating in performance reviews, discussing other matters related to employment, etc., the MM will report directly to a member of CAMPO's planning staff

- Members of the MCC will coordinate with the designated CAMPO supervisor to provide feedback on any matters regarding the MM's performance and job duties

- The mobility management implementation plan will serve as the blueprint for the region's program initially. See Mobility Management Implementation Study (MMIS) Final Report dated June 2023, and in particular Chapters 4, 5, and 6.

JOB SUMMARY

The CAMPO region's mobility manager will support the implementation, growth, and evolution of a regional mobility management program (MMP), which aims to deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The position involves:

- Engagement, outreach, and coordination activities to offer consistent and easily accessible information on available public transportation services,

- Ongoing data collection, analysis, and reporting to identify trends, clarify needs, and recommend ideas that address the concerns of people who face mobility challenges, and

- Support for efforts to coordinate travel, through stronger collaboration and the potential use of technology.
- Maintain records, prepare periodic reports, and give presentations

ACTION ITEMS FROM TRANSIT PROVIDER INTERVIEWS

The following key themes and associated action items derive from individual interviews with the region's public transportation providers as part of MMIS Task 10 (Participants' Operational Review, Analysis, & Recommendations).

Themes and Actions from Provider Interviews

Theme	Actions
Transportation Information Management See details below	Become familiar with all available services and track any changes in schedules, fares, eligibility, etc.
	Develop, share, and maintain consistent reporting tools.
Regional Trip Coordination and Transfers	Develop consistent forms for tracking regional trips requiring more than one provider and/or not served by any provider.
	Analyze travel patterns and trip routes to identify possible transfer locations.
Trip Planning Resources	Collaborate with GoTriangle and other agencies in any trip planner resource improvements.
	Track and report on other technology improvement strategies as they develop.
Software Compatibility	Become familiar with scheduling and dispatching software used by each provider as well as for microtransit services.
	Track any plans to upgrade/replace software.
Additional Partnerships and Coordination	Periodically coordinate with other regional or state agencies to understand their programs.
	Establish and maintain relationships with municipalities, particularly those considering future transit services.
Travel Training	Identify existing travel training programs in the region, such as those developed by the Alliance of Disability Advocates to learn about program delivery.
	Work with individual providers to identify specific travel training needs.

Information Management Guidance

The following provides additional guidance on managing transportation information, which involves working with the region's public transportation providers, obtain and maintain a centralized database of current information on available public and other transportation options.

Public transportation information includes:

- Fixed routes, schedules, and fares
- Complementary paratransit (ADA) eligibility processes, including application requirements
- Complementary paratransit (ADA) fares, service areas, rider policies, and procedures for requesting trips, including subscription (standing order) trips
- Demand-response services, including service area, schedule, reservations requirements, fares, rider policies, etc. This includes microtransit services.

Other transportation information includes:

- Services provided to groups, residents, organizations, etc., noting any eligibility restrictions
- Non-emergency medical transportation (NEMT) options funded by Medicare, including eligibility requirements and rider policies
  - Note: many of these services are currently provided by the region's public transportation providers
- For-hire transportation options such as shuttles, taxicabs, ride-hailing companies such as Lyft, Uber, etc.
- Other services operating wheelchair accessible vehicles (WAVs)

TIME ALLOCATION

The mobility manager (MM) will need to allocate time for activities that are organized according to the following three goal topics.

1. Engagement, outreach, and coordination
2. Data collection, needs assessment, and program redesign
3. Program evaluation and refinement

The tables on the following pages include estimated time allocations for each strategy in the implementation plan grouped by goal topic. The estimates are for three time periods:

1. Year 1: Months 1–6
2. Year 1: Months 7–12
3. Year 2 and beyond

A few strategies do not have time allocations called out as they would be included in other activities. In addition, some strategies may take more time during certain weeks such as when meetings with the MCC or other boards and committees are scheduled. During these weeks, time adjustments would be needed for other tasks. It is suggested that non-priority tasks are deferred when needed.

Further, it is anticipated that the allocation of time will shift as needs evolve. The MCC should provide ongoing direction for such changes

SUGGESTED ALLOCATION OF TIME FOR MOBILITY MANAGER

Goal Topic: Engagement, Outreach, and Coordination

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Conduct partner outreach, including site visits with providers	40%	30%	15%	Ongoing Activity	▪ Using information obtained during one-on-one provider follow-up conversations, confirm each agency's MMP liaison ▪ Establish a schedule for regular and recurring visits to provider offices and/or contractor facilities ▪ Confirm other potential partners and interested parties and establish schedule for outreach activities ▪ Participate in partner events as appropriate ▪ Also see Public Outreach & Marketing Strategy	▪ Meetings held and events attended ▪ Number of participants (external events) ▪ Comments received on program effectiveness and actions taken
Develop and maintain transportation services information and database	30%	20%	5%	Ongoing Activity	▪ Develop electronic resource (spreadsheet or database) listing all available service characteristics with a focus on demand-response ▪ Coordinate with providers to regularly share information updates ▪ Work with each CAMPO area provider to identify methods for customer interactions regarding available services in the region ▪ Publish information as a downloadable document ▪ Also see Public Outreach & Marketing Strategy	▪ Participating agencies ▪ Number and type of documents distributed and/or downloaded ▪ Frequency and timing of updates
Develop mobility management identity and brand	0%	0%	10%		▪ 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 ▪ Also see Public Outreach & Marketing Strategy	▪ Specific resources created and shared using brand ▪ Brand survey results
Develop and eventually publish public-facing materials	0%	10%	10%	Revised as needed	▪ 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 ▪ Also see Public Outreach & Marketing Strategy	▪ Materials produced and distributed and/or downloaded

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Conduct targeted outreach	5%	10%	10%	Ongoing activity	- Work with providers to 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 - Also see Public Outreach & Marketing Strategy	- Meetings held and events attended - Number of participants - Feedback received on program effectiveness and recommendations for program modifications
Participate in regional transportation planning coordination	5%	5%	5%	Ongoing activity	Participate in ongoing transportation planning activities such as the forthcoming coordinated plan update (subject to time availability)	- Meetings attended - Committees joined - Notes
Design, launch, and maintain mobility management webpage	0%	0%	10%	Ongoing activity	- Determine who will host dedicated webpage - Develop content and links - Work with providers to confirm messaging for directing visitors to MM webpage from their provider websites - Also see Public Outreach & Marketing Strategy	- Publication of site - Visitors - Document downloads, including directory
Refer riders to transportation options	5%	5%	15%	Ongoing activity	- Document all available transportation services and eligibility rules - Work with individual providers to identify best ways to support referral process - Develop communications protocols for describing ways MM program can assist and publish on MM webpage	- Agency and organization contacts - Approach to addressing inquiries and tracking requests - Solutions not found
Refer riders to travel training	0%	0%	5%	Scope TBD	- Identify past and existing travel training programs in the region, including those by transit providers and those by other agencies, including Alliance of Disability Advocates - 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	- Training requests - Trainers trained - Training provided
Subtotal	**85%**	**80%**	**85%**			

Goal Topic: Data Collection and Needs Assessment

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Compile data, records of client and agency contacts, and lessons learned				Included in other activities	▪ 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	▪ Trend analyses ▪ Clients served ▪ Agencies participating ▪ Unmet needs (i.e., solutions not available for requests made)
Identify opportunities for trip coordination				Included in other activities	▪ Work with rural providers (HARTS, JCATS, KARTS, GoWake Access) to map common destinations, service schedules, funding programs, etc. ▪ Quantify extent of demand for overlapping service ▪ Document opportunities and constraints for trip sharing including program rules ▪ As applicable, identify locations for potential transfers ▪ Work to identify potential pilot program	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement
Subtotal	**0%**	**0%**	**0%**			

Goal Topic Program Evaluation and Refinement

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Meet regularly with decisionmakers and MCC	10%	10%	5%		▪ 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 Appendix B	▪ Trend analyses ▪ Clients served ▪ Agencies participating ▪ Unmet needs (i.e., solutions not available for requests made)

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Use compiled data and records of client and agency contacts to refine program priorities				Included in other activities	▪ 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 Final Plan	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement
Participate in staff training and development	5%	5%	5%		▪ 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	▪ Conferences attended ▪ Contacts identified ▪ Progress toward certification (credit hours completed ▪ Maintenance of certification
Provide technology assistance and related advocacy	0%	5%	5%		▪ Track adoption of scheduling and dispatching software, microtransit booking applications, and other trip planning tools ▪ Coordinate with GoTriangle (lead agency for regional trip planner) ▪ Participate in ongoing regional transportation technology discussions ▪ Understand how users are learning about services ▪ Advocate for including all demand-response services in technology integration efforts ▪ Identify opportunities for technology integration pilot for potential trip sharing	▪ Document technology challenges raised during outreach and coordination, including meetings attended ▪ Track relevant technology evolution and use
Total	**100%**	**100%**	**100%**			