



Technical Memorandum #3: Mobility Management Strategies

Ulster County Transportation Council (UCTC)

Draft

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1 INTRODUCTION

PROJECT BACKGROUND

Ulster County Transportation Council (UCTC) hired Nelson\Nygaard Consulting Associates and Susan Blickstein Consulting to update the 2010 Ulster County Human Services Transportation Coordination Plan (HSTCP).

The 2016 Ulster County HSTCP will include the following items:

- A literature review of recent coordinated transportation plans in New York State
- A demographic and economic profile of Ulster County
- An inventory of existing transportation service providers in the county
- A review of funding resources available for human service transportation in New York State
- A gaps and needs analysis including stakeholder and public input
- An analysis of potential and prioritized coordination strategies

As required by the FTA, the HSTCP process will include a varied and inclusive outreach process, which is documented as part of Technical Memo #2 and this technical memo. The outreach process convened County stakeholders, providers, transit users, and other related parties to understand the transportation gaps and needs related to the requirements of older adults, people with disabilities, veterans, and individuals with limited incomes and discuss and prioritize coordination and mobility management strategies and solutions to fill these gaps and needs.

APPROACH

This technical memo is the third and final stand-alone report prepared throughout the course of this project. In the first memo—the Existing Conditions report—the consulting team developed a demographic profile of the county, identified the major economic and service destinations, developed an inventory and summary of each available transportation provider, and provided a summary of the state and region’s most recent coordination plans and best practices.

Building on the information gleaned from the first memo, the second technical memo—the Gaps and Needs Analysis—documented the transportation gaps and needs identified in Ulster County and presented the qualitative data gathered as part of the project’s stakeholder and community outreach.

This third technical memo summarizes the gaps and needs found through previous data analysis and community outreach activities, presents an overview of mobility management strategies that are appropriate for addressing service gaps for the target populations in Ulster County and describes best practices and model programs from New York State and other locations, and

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documents the community vetting and prioritization of these strategies. Recommended coordination/mobility management strategies for Ulster County are also provided.

2 SUMMARY OF SERVICE GAPS AND NEEDS

Before presenting potential coordination/mobility management strategies, it is important to review the gaps and needs identified in the two previous technical memos and through community outreach. The mobility management strategies presented in this chapter are a direct response to these gaps and needs and hope to provide solutions for identified transportation challenges.

SERVICE GAPS AND UNMET NEEDS

Through data analysis and stakeholder outreach, the following primary service gaps were identified for older adults, people with disabilities, and other non-drivers in Ulster County:

- Although the fixed route bus service operated by UCAT and Kingston Citibus covers the county's population centers and many major destinations, the more rural areas of the county do not contain sufficient density of population and/or jobs to support fixed route service. Many rural residents are without transportation services because they cannot access the fixed route system. In addition, some employers in Saugerties and New Palz are not near fixed bus routes.
- Fixed route bus service is limited during evening and weekend hours.
- Potential riders are not aware of all their travel options, and feel that information can be difficult to find and/or use, especially regarding the fixed route system.
- Transportation services for older adults and people with disabilities (including veterans) are often limited to specific destinations or trip types. For example, seniors may be able to travel to a senior center or make shopping or medical trips, people with developmental disabilities may have transportation to a day program, and veterans may have medical transportation. However, individuals often lack transportation options that can be used for any type of trip, including work, medical, shopping, recreation, and personal business.
- More accessible vehicles are needed; transportation providers need newer vehicles and enough vehicles to use as spares if vehicles are out of service.
- There is a lack of transportation in outlying areas and connections outside the county to Poughkeepsie and Newburgh.

SERVICE OVERLAPS AND RESOURCES

There are also several opportunities in the County for sharing existing resources among providers in order to expand services. For example:

- There are several organizations with vehicles that have significant downtime. For example, the 15 non-residential vehicles operated by the Arc of Ulster-Greene are idle

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during the mid-day period from 10:00 AM to 2:00 PM and on weekends. Additionally, Gateway Industries ends regular transportation service at 5:30 PM, which means there are approximately 10 or so non-residential vehicles available for evening service. Gateway Industries' 10+ non-residential vehicles are also unused on Sunday.

- There are opportunities to coordinate management/administrative activities among transportation providers, including maintenance contracts, driver training activities, drug and alcohol testing and grant applications.
- The UCAT and Kingston Citibus systems are separate at present, but consolidation efforts are underway to eliminate duplication and increase efficiency and economies of scale.

The mobility management strategies described in the next chapter offer solutions to the gaps and needs identified above and take into account these resources and opportunities for coordination.

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3 POTENTIAL MOBILITY MANAGEMENT STRATEGIES

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

Coordination of transportation services has been shown to result in the following types of benefits for participating stakeholders:

- Better use of transportation resources
 - Fewer empty seats on vehicles
 - Improved service monitoring and accountability
 - Reduced duplication of services and/or administration
 - Service for more customers or additional trip types
- Cost savings or more service(s)
 - Some agencies may see significant savings
 - More often, funds saved through increased efficiency are used to meet more needs by carrying more trips, expanding service area or hours on existing services and/or implementing new mobility options
- Improved service quality
 - Consistent standards for safety, training, vehicle maintenance
 - Expanded days/hours of service or service areas
 - Centralized sources of information about transportation options

This chapter provides a brief description for each of eleven preliminary coordination/mobility management strategies that could be used to address the travel challenges faced by older adults and people with disabilities in Ulster County. The purpose for providing this information was to allow all members of the Technical Advisory Committee (TAC) and the Stakeholder Advisory Group (SAG) to investigate the opportunities in detail in order to prioritize several strategies for implementation in the County.

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The coordination/ Mobility Management Strategies described in this chapter and summarized in Figure 1 and include:

- Joint Management/Administrative Activities
- Vehicle Sharing
 - Between two or more agencies
 - Vehicle pool
 - Provision of used vehicles to smaller organizations
- Centralized Transportation Information and Marketing
- Centralized Scheduling/Dispatch
- Contracting for Service
 - Between 5310 subrecipients
 - Between 5310 providers and other human service agencies
- Expanded Travel Training Program
- Flexible Transportation Voucher Program/Volunteer Drivers
- Vanpool or Ridematching Program for Job Access
- Mobility Manager

This chapter provides general information about each strategy, including benefits and potential obstacles in implementation, preliminary recommendations for application in Ulster County, examples of national leaders who have successfully implemented each strategy, and preliminary costs.

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Figure 1 Potential Strategies to Address Service Gaps and Improve Efficiency

Strategy	Gap/Need Addressed	Description	Lead Agency	Benefits	Challenges	Estimated Cost to Implement
Coordination Among Providers						
Joint management/administrative activities	Duplication of effort	Any or all of the above functions would be handled jointly by providers: Vehicle maintenance contracts Driver training Drug / alcohol testing Grants management	One provider for all joint functions, or split among providers Mobility Manager could also handle or coordinate	Economies of scale when purchasing services Reduced management/administrative time overall	Providers may not be interested in changing current practices	Staff time for lead agency; offset by savings
Centralized information	Lack of awareness of transportation options Duplication of effort	Low tech - printed directory of services High tech - one-call/one-click system (website and/or call center); trip planning and trip booking could be provided	UCTC or Mobility Manager	Improved mobility when county residents are aware of all services Increased ridership for providers	Maintaining up to date information Funding for operations and marketing	Simple website with seArch function and portal for provider updates - several thousand up to \$100,000 High tech versions - several hundred thousand to \$1M

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Strategy	Gap/Need Addressed	Description	Lead Agency	Benefits	Challenges	Estimated Cost to Implement
Centralized scheduling/dispatch	Duplication of effort	Multiple providers use same reservations/scheduling software; may or may not allow providers to book trips on each other's vehicles	UCAT	Opportunities for coordinating trips Better utilization of vehicles - higher productivity = lower cost/trip	Providers may not be interested in changing current practices	Additional licenses or development of web-based portal for access to software
Contracting for service	Under-utilized vehicles	Organizations that would rather not be in the transportation business purchase service from another provider OR Organizations with unused vehicle time provide service for other organizations during those hours	Example - Always There Home Care, UC Veterans Services, or Jewish Family Services may wish to purchase service from UCAT, ARC, or Gateway Mobility Manager could facilitate	Ability of purchaser to focus on main mission, rather than provision of transportation service Increased productivity for contractor agency = lower cost/trip Better use of transportation resources	Providers may not be interested in changing current practices	Staff time to get initial contract in place
Vehicle sharing						
Two organizations jointly apply for 5310 vehicles	Under-utilized vehicles	Providers with complementary needs submit a joint 5310 application and share vehicle(s)		Reduced operating and maintenance costs Less unused vehicle time	Finding providers with complementary needs	Portion of staff time for participating organizations-- likely not significant

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Strategy	Gap/Need Addressed	Description	Lead Agency	Benefits	Challenges	Estimated Cost to Implement
Vehicle pool	Under-utilized vehicles Increased availability of accessible vehicles	Donated or new 5310 vehicles pooled and "rented" by participants as needed. Recurring schedule or occasional use. Fees charged for vehicle use cover insurance, maintenance. Renters provide drivers (trained by lead agency) and fuel.	Larger provider-- UCAT, ARC, or Gateway Industries-- or Mobility Manager	Reduced overall capital investment in vehicles Reduced vehicle operating costs	Differing insurance coverage and driver requirements across participating agencies Agreements on cost sharing Establishing policies and procedures	Approximately 10-20% of lead agency employee's time (or Mobility Manager's) to coordinate
Provision of used vehicles to smaller organizations	Under-utilized vehicles Increased availability of accessible vehicles	Larger provider transfers new vehicles or those scheduled for retirement to smaller organizations; could be in exchange for providing trips	Example - UCAT provides vehicles to UC Veterans Services, UC OFA, or Family of Woodstock in exchange for provision of ADA or demand response trips Mobility Manager could coordinate	Reduced vehicle acquisition costs for smaller providers More use out of vehicles	Recipient is typically responsible for maintenance and insurance costs	Some staff time of larger provider to administer; could be offset by provision of trips by recipient

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Expand or Supplement Transportation Options						
Expanded travel training	Better use of existing services Response to stakeholder comments	UCAT and OFA currently provide travel training services. These programs could be merged and/or expanded to a wider range of trainees.	UCAT, UC OFA, or Mobility Manager	Improved mobility for Increased ridership for providers Use of most cost-effective (and appropriate) mode makes best use of transportation resources	Additional trainers would likely be needed Training individuals with developmental disabilities is labor-intensive	
Flexible voucher program	Lack of transportation options for non-program trips, for veterans, and in parts of county without fixed route service	Sponsor agencies subsidize vouchers for eligible individuals, who use them to purchase trips from participating public and private providers, volunteer drivers, or friends/family	Mobility Manager	Improved mobility for users Offers choice of provider to users Extends reach of existing volunteer driver programs, without need to recruit additional drivers Cost-effective way to provide options in unserved areas	Requires lead agency to administer Finding sponsor agencies	In-house: \$10,000 to start up -- simple software and printing vouchers 15-30% of staff person's time to administer Cost of vouchers OR TRIP model 9/16/2016 \$750 training, \$275 software license, \$2.50/day Cost of vouchers

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Strategy	Gap/Need Addressed	Description	Lead Agency	Benefits	Challenges	Estimated Cost to Implement
Vanpool or ridematching program for work trips	Additional service needed for work trips	Not all employers are located on bus routes	Mobility Manager	Address need for work trips--open job markets to people with disabilities and other non-drivers Opportunities for partnerships with employers	Relatively easy to implement but require funding Employers and other potential partners may not be interested in participating	TBD if this strategy moves forward
Mobility Manager		Mobility Manager to facilitate coordination of transportation services within Ulster County and oversee implementation of strategies to address service needs and gaps.	A Mobility Manager could be housed within an Ulster County department, a nonprofit transportation provider, or an independent nonprofit organization	Continued momentum and staff resources needed for implementation of coordination/mobility management strategies	Need to find a Mobility Manager with the right skills Matching funds to support position Support from a coordinating council or similar body needed for MM to be most effective	Part-time to full-time salary of approximately \$30,000-60,000 to start. Support staff likely to be needed as program grows.

JOINT MANAGEMENT/ADMINISTRATIVE ACTIVITIES

By purchasing common support resources and shared vehicles and by purchasing service from partners with available capacity, agencies are able to lower costs by splitting common expenses. In addition to saving money, an advantage of these strategies is that it paves the way to subsequent and more complex coordination, such as consolidated services, because it helps build trust among participating agencies, a necessary building block, in some cases, can help smooth out the differences in service delivery policies.

These strategies could be considered by Ulster County transportation providers:

- Joint Driver Training
- Joint Procurement of Support Resources
- Coordination of Funding and Grant Writing

Joint Driver Training

Coordinated driver training programs are administered by a lead entity that provides combined training to multiple transportation providers that pay a fee to be included in the program. Transportation providers save money by purchasing driver training from another entity, especially on specialized equipment training, because they are able to pool their resources. Well-trained drivers positively affect the consistency of service quality more than any other factor, which can translate to lower insurance premiums over time. Driver training can also pave the way to consolidation and coordination because all the different providers are providing services in the same way and have the same policies and procedures.

To implement a driver training program, interested agencies need to research training requirements, recruit training participants and determine which training provider is best suited to meeting local training needs. Coordinated driver training programs typically include curriculum enhancements to include the best aspects of each provider, while ensuring that drivers are aware of the requirements for their specific program.

Joint Procurement of Support Resources

Joint procurement or sharing support resources allows participating agencies to lower costs by splitting common support expenses between two or more independent agencies. Examples of support resources commonly shared include insurance, maintenance services, fuel, and contracted staff, such as volunteers and grant writers. Agencies can also benefit from information sharing, which includes policy and procedure manuals, training curriculum, evaluation guidelines, and safety standards.

Joint procurement allows agencies with limited resources to have access to full services upon request. It also allows agencies to develop their own specialties and serve communities with higher expertise and supports the maintenance of existing community transportation services. More than likely, a formal interagency agreement is needed among participating agencies. Without uniform cost accounting, calculating cost of agencies' service is often a challenge. In many cases, sharing support resources should be led by a Regional Coordinating Council.

Coordinated Funding and Grant Writing

Coordinated funding and grant writing is a strategy through which a single agency prepares and manages funding and grant opportunities for several agencies. It reduces the amount of time spent by individual agencies on writing competing grants, establishes relationships between a lead grant writing agency and partners, provides for uniform management of grant funds, and creates unique

opportunities for leveraging existing funds to meet grant matching requirements.

Coordinated grant writing requires that participating agencies agree upon how grant funds will be shared, addressing priorities for funding before submitting a unified application. These efforts can benefit partners as they will become more competitive for transportation funds where coordination, partnerships, and program efficiency are evaluation criteria. Further, by coordinating grant writing agencies are able to access a wider range of funding programs and local match opportunities, as well as reducing regional costs for pursuing grants. Moreover, agencies can access more specialized grant-writing and planning staff.

Benefits

- Economies of scale when purchasing services
- Reduced overall management/administrative costs

Potential Challenges

- Providers may not be interested in changing current practices

Examples of Best Practices

The Massachusetts Rural Transit Assistance Program (MARTap) provides driver training programs to adhere to MassDOT-mandated training requirements for all vehicle acceptance recipients under the Commonwealth’s Mobility Assistance Program (MAP). MARTap provides training free of charge to all MAP recipients, which includes both paid and volunteer drivers for transportation, human services organizations. The training courses include education seminars for van and bus drivers, wheelchair lift and securement training, and passenger assistance technique training. MARTap also offers optional courses to improve customer service, train drivers on passenger sensitivity, and provide emergency and accident procedural training.

DARTS, Dakota County, MN, a non-profit agency operator, established a Vehicle Maintenance Services (VMS) subsidiary that maintains vehicles for 80-90 organizations. VMS services for organizations located in the Twin Cities region that operate specialized vehicles for transit-dependent riders. Smaller transportation providers that use DARTS VMS decrease their vehicle operating costs, reduce vehicle downtime, and improve vehicle safety for their riders.

The Lima-Allen County Regional Transit Authority in Ohio hosts a consortium that includes Shawnee schools, Marimor Schools, Lima and Allen County and others to purchase fuel in bulk. In 2009, the city of Lima saved \$58,000, and in 2010 that number went up to \$202,000.¹

The Non-Profit Insurance Program (NPIP), in Washington State administers a Joint Insurance Purchasing program. NPIP members jointly purchase insurance and claims adjustment, risk management consulting, and loss prevention services. Primary benefits are lower insurance premiums and stable access to the insurance market. NPIP offers “volunteers as insurers” coverage.²

¹ <http://www.limaohio.com/news/fuel-75331-city-consortium.html>

² <http://www.npip.org/washington/coverage.php>

North Front Range Metropolitan Planning Organization in Fort Collins, Colorado prepares, files, and manages unified grant applications on behalf of transportation providers in its region. The objective is to obtain the most funding for providers in the region while minimizing duplication of effort, reporting and management requirements. The North Front MPO is the designated recipient for FTA funding and provides oversight for transit agencies applying for grants in these pools. Lambert county mobility council oversees that grant program.

Costs

Costs would include staff time for the lead agency to take on additional management/administrative duties, but those costs would be offset by savings to the participating agencies as a group. Non-lead agencies could each contribute a portion of the cost of staff time for the lead agency.

Potential Funding Sources

- Normal sources of operating assistance

Potential Lead or Partner Organizations

- One provider for all joint functions, or split among providers
- Mobility Manager could also handle or coordinate

CENTRALIZED TRANSPORTATION SERVICE INFORMATION

People in search of transportation services often do not know where to begin or what services are available to them. Typically, a county or region will utilize a central, single point of contact (a website and/or call center, called a “One-Call/One-Click” resource) where people can learn about available transportation resources in order to schedule rides they need for daily activity or for occasional appointments.

As the name implies, one-call/one-click systems offer one-stop shopping for users seeking information about their transportation options and in some cases, access to service providers for trip booking. One-call/one-click systems may include only specialized services, such as ADA paratransit and services available for older adults, people with disabilities, veterans, or other groups with particular mobility challenges, or also include information about general public fixed-route and paratransit services, ride-matching programs, taxis and other private transportation services, volunteer driver programs, voucher/subsidy programs, vehicle sharing programs, and even the relatively new real-time services available through “transportation network companies” (TNCs) such as Uber and Lyft.

One-call/one-click systems can vary considerably in the degree of trip planning and booking assistance they provide for customers, and their use of technology to support those functions. Consequently, development and implementation costs can vary quite a bit as well.

Moving from simple to complex, one-call/one-click systems may consist of:

- A centralized list of transportation services, conveyed over the phone, on a website, or in a printed directory
- An online directory that transportation providers can update directly
- Opportunities for the user to narrow transportation options based on selected criteria
 - By speaking with a person
 - Through online prompts (Pima Find-A-Ride is at this level)
- Trip planning assistance
 - With the help of a person or an online system
- Trip booking assistance
 - From a person or via a transferred call to the transportation provider
- Direct trip booking
 - Via web-based scheduling or portals to participating providers’ reservations systems
 - With more or less integration of different providers’ schedules

Users, service providers, and partners must be aware of available transportation information and understand how to use it in order for the service to be successful. Promotion and marketing is essential for attracting and retaining users. A marketing and promotion plan should account for all target audiences and identify and implement strategies to ensure that each target audience is reached.

Benefits	Potential Challenges
<ul style="list-style-type: none">▪ Simplifies access to information about transportation services▪ Promotes services to attract new users	<ul style="list-style-type: none">▪ Maintaining accurate and relevant information for many different agencies▪ Establishing protocols to assure that customers' needs are met▪ Finding funding for operations and marketing

Application for Ulster County

Ulster County and the surrounding region does not currently have a One-Call/One-Click system, which means that individuals who need to access services and the organizations that assist them do not have a single point for transportation information. This problem came up several times during stakeholder interviews and focus groups, especially related to a perceived lack of information about the fixed route services (UCAT and Citibus) that was easy to find and use. (Stakeholders did note, however, that UCAT staff is very willing to provide personal assistance to callers who are seeking route and schedule information.) The county needs a simple-to-read, easy-to-update web-based information repository that provides information about fixed route schedules and fares (including maps), human service providers and eligibility, taxi cab providers, and private operators.

Additionally, once the repository has been developed, it should be publicized by the Mobility Manager through a variety of social networks, partnerships, and through training and education sessions with users.

Examples of Best Practices

The Maricopa Association of Governments (MAG) serves as the regional planning and policy agency for the metropolitan Phoenix area. The Human Services Transportation Provider Inventory is a listing of agencies that provide human services transportation in the MAG region. Users can click on check boxes for area of service, modes of transportation, and eligibility to narrow the search of transportation information resources. For example: if a user checks “Phoenix,” “Taxi Vouchers,” and “Older Adults” the inventory will narrow down the provider list to include only the two providers that offer taxi vouchers within Phoenix for older adults. A user can also see the full list of transportation providers in the MAG area by choosing not to narrow the search.

Figure 2 MAG Provider Inventory

Human Services Transportation Provider Inventory is a listing of agencies that provide human services transportation resource information in the MAG region. Click on the check boxes below to narrow your search of transportation information resources.

Refine Your Search Here

	Area of Service						Modes of Transportation				Eligibility					
	Phoenix	East Valley	West Valley	Flagstaff	Gila River Indian Community	Salt River Pima Maricopa Indian Community	Bus/Paratransit	Personal/Volunteer Vehicle	Taxi Vouchers	Bus/Paratransit	Van	Taxi	Agency Clients	Older Adults	Physical Disability	Developmentally Disabled
AAA Full Transportation	<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
About Care, Inc.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
AIRES	<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
All Valley Transportation	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>				
American Cancer Society	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>											<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
American Handicapped Transport Services HTS	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Angel Flight West	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Arizona Bridge to Independent Living	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Arizona Center for Disability Law	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>												<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Arizona Center for the Blind &	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>													

511NY

Operating at the medium level of functionality, 511 NY serves as the official telephone and web-based information provider for transportation services and travel conditions throughout New York State. The information provided includes alerts on traffic incidents, transit service availability, weather conditions, rideshare matching, and more.

The service, which began in 2009, offers localized transit trip planning for seven different areas of the state on its website, while the 511 phone service offers an interactive, automated system that can be managed by using phone keys, or controlled by the user’s voice. For users that need to access more personalized information, the system can transfer users of the phone system to outside agencies whose information is used on the website. The information is also available via smartphone app, and designed to meet the needs of a variety of different travelers from daily commuters to long-distance commercial vehicle operators. Links to more local information resources are also available on the 511 website. The website additionally provides a seArch function that allows users to find available transit or paratransit services for any particular county or 511 regions.

Transportation Link-Line: Schuyler County, NY

Transportation Link-Line is a free information and assistance service that connects people in Schuyler County and neighboring communities with transportation options. On the higher end of the functionality spectrum, Transportation Link-Line also provides public outreach, transit orientation and responds to public inquiries regarding transportation options. Call-takers at Link-Line help connect callers with specific services and assist with trip booking as needed. Link-Line includes scheduling and routing software, a central repository of information, and a multimedia marketing and outreach campaign to educate the public.



The online platform is operated by the ARC of Schuyler and is funded by a Veterans Transportation and Community Living Initiative grant from FTA and funding from NYS Department of Transportation and Schuyler County Office for the Aging.

Costs

Developing a simple web-based repository with search functions and a portal for transportation providers to update their own information would require hiring a web designer/developer company. Depending on the size and functionality of the project, costs could range from \$3,000 to \$100,000.

Based on the experiences of FTA's Veterans Transportation and Community Living Initiative (VTCLI) grantees and recipients of grants from the prior federal Mobility Services for All Americans (MSAA) initiative, which funded the development of eight Transportation Management Coordination Centers (TMCCs), planning, design, and development of a sophisticated one-call/one-click system may take several years, and costs may range from several hundred thousand to a million or more dollars.

Promotion and marketing of the information tool will require a marketing plan (approximately 6-12 hours to develop), as well as ongoing implementation hours (approximately 2-4 hours/week for up to six months post launch).

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities—mobility management project within the 55% portion of the of region's annual apportionment, funded at 80% federal participation.

Potential Lead or Partner Organizations

- UCTC
- Mobility Manager

CENTRALIZED RESERVATIONS, SCHEDULING AND DISPATCH

The goals of coordinating transportation services include making maximum use of the resources of participating agencies and reducing duplication of services. Centralizing the reservations and scheduling functions of a number of transportation providers makes it possible to use the combined vehicle capacity of the group to serve the trips requested by customers of all the participating agencies. As a result, more trips can be scheduled on each vehicle than would be possible otherwise. As vehicle productivity increases, the cost of providing each trip decreases, and providers have more resources to meet additional needs.

When reservations and scheduling are centralized, customers of all participating agencies (or agency personnel on behalf of their customers) call a central reservations number to book their trips. A lead agency or Mobility Manager then develops schedules for each of the participating providers, choosing the most appropriate and cost-effective provider to serve each trip. Dispatch, including taking return trip requests and/or “where’s my ride” calls from customers, could be centralized or still the responsibility of individual providers. The central reservations number could be part of a centralized call center or one-call/one-click system that would also offer information about transportation options, trip planning assistance, referral to travel training programs, and other functions.

Alternatively, as part of relatively complex one-call/one-click system, providers can use web-based scheduling or portals to other providers to view each other’s schedules and either request that trips be delivered by another provider or schedule trips directly onto another provider’s vehicles. In that case, scheduling would be coordinated, but not centralized.

Use of an Automatic Vehicle Location (AVL) system and onboard tablets (more commonly used today than Mobile Data Terminals or Mobile Data Computers) by all participating providers increases opportunities to make maximum use of vehicle capacity by identifying the best vehicles to handle return trips or trips that must be re-scheduled due no-shows, vehicle breakdowns, weather delays, or other operational issues in real time. An AVL system would also support centralized dispatch. Such technology can also be used to record extensive trip data, prepare detailed reports for providers, and facilitate billing.

Benefits

- Opportunities for grouping trips across providers
- Can reduce travel time for riders and reduce advance notice requirements
- Better utilization of vehicles=higher productivity and lower per-trip costs

Potential Challenges

- Providers may not be interested in changing current practices
- Must develop cost allocation/sharing methodology
- Easiest to achieve with help of scheduling software
- Requires providers to share client and trip data; can be time-consuming
- Staff requirements may not change, but reservationists and schedulers may be need to be employed by the lead agency rather than individual providers

Application for Ulster County

Centralized reservations and scheduling (and perhaps dispatch) among transportation providers in Ulster County could be developed incrementally, building on the plans to consolidate the UCAT and Kingston Citibus systems. After successful centralization of reservations and scheduling for those two agencies' demand-response services, human service providers such as the ARC of Ulster-Greene and Gateway Industries could be added to the centralized system.

Centralized reservations and scheduling (and perhaps dispatch) should be a component of a one-call/one-click system for Ulster County that offers information and assistance at a minimum and possibly more complex functions such as online reservations and automated trip planning.

Examples of Best Practices

Lower Savannah Council of Governments

The South Carolina Department of Transportation (SCDOT) designated the Lower Savannah Council of Governments (LSCOG) as the Regional Transit Management Agency (RTMA) and transportation coordinating agency for the six-county Lower Savannah region in southwestern South Carolina. The six counties are primarily rural, but a small segment of the Augusta, GA large urbanized area is also included in the LSCOG region.

Prior to LSCOG's coordination efforts, a number of public transit and human service agencies operated their own vehicles independently, resulting in both unserved areas and customer groups and overlapping trips to regional employment and medical destinations

LSCOG utilized grants from U.S. DOT's Mobility Services for All Americans (MSAA) initiative, the American Recovery and Reinvestment Act (ARRA), the JARC and New Freedom programs, the federal Administration on Aging, and the Centers for Medicare and Medicaid Services (CMS) to develop a Transportation Management Coordination Center (TMCC) for its region. LSCOG added transportation services to scope of the Aging and Disability Resource Center (now known as the ADRTC) it operates for its region and purchased technology to enable the coordination of public and human service agency transportation services across the six counties.

Through the ADRTC, LSCOG provides transportation information and assistance for residents throughout the region and takes trip requests for the public transit services operated in Allendale and Bamberg Counties and schedules those trips centrally. The centralized call center is connected to local call centers in other counties. All providers use the same reservations and scheduling software to facilitate trip grouping.

As part of the effort, human service agencies opened available seats on their vehicles to the general public, and providers all agreed to a standard reimbursement rate for trips provided to the clients of other agencies.

Technology systems that support the coordination effort include reservations and scheduling software, on-board MDTs, a new call center and telephony, a website and web portals to facilitate online trip reservations.

Costs

The costs associated with planning and implementing a centralized reservations and scheduling system from the ground up can be significant, if they include the acquisition of office space and/or telephony for a call center, reservations and scheduling software, and an AVL system that

uses onboard tablets or Mobile Data Computers (MDCs). Building on existing call centers and technology systems would reduce expenses.

Potential Funding Sources

- 5310 mobility management funds from 55% for planning and acquisition of technology to support coordinated functions
- Normal sources of operating assistance for ongoing operations

Potential Lead or Partner Organizations

- UCAT
- Kingston Citibus

CONTRACTING BETWEEN PROVIDERS

Contracting between organizations for the provision of transportation service takes advantage of vehicle downtime by utilizing this excess capacity to satisfy unmet demand, provide overflow capacity at high peak times, and offer a more cost-effective way of providing occasional weekend or evening trips. In this way, one provider (the “buyer”) can purchase service from another provider (the “seller”), which will allow the “buyer” to cut costs and the “seller” to raise additional revenue.

Similar trip characteristics, geographic areas, and program policies and procedures facilitate purchases of service. The payoff is a reduced cost per trip—both operating and administrative—due to increased ridesharing opportunities, less downtime, consolidated administration and support services, and economies of scale in general. Another benefit to contracting for service is that it offers an alternative for organizations that do not wish to invest in staff, vehicles, and other transportation infrastructure or spend time managing transportation services in order to provide access to programs and services for their clients.

The first step is determining all costs attributed to each provider’s transportation program to understand the true costs for each entity involved and the benefits that could result from the purchase of service. Developing a formal cost allocation analysis allows the “seller” to charge the correct rate for providing service.

Once both entities have decided on a rate, it is important for each trip to be accurately recorded and billed. Enhanced scheduling and dispatching technology and in-vehicle technology that enables time and location stamping allows providers to accurately track when and for how long their vehicles are being used by another entity’s clients. Technologies include use of mobile data terminals (MDTs), automatic vehicle locating systems (AVL), automated cost allocation of co-mingled trips through scheduling/dispatching software, and smart card technology.

Benefits

- Increased productivity for the contractor
- Decreases the cost per trip
- Purchaser relieved of responsibility for daily transportation operations

Potential Challenges

- Requires strict policy directive from administering agency and adoption of policy by participating agencies
- Requires administrative oversight, performance monitoring and fraud control efforts
- Providers may resist changing current practices

Application for Ulster County

In Ulster County, several organizations are already contracting for service with other providers. UCAT provides service to the Office for the Aging and Gateway Industries. Gateway Industries also contracts with Citibus for some services (as well as First Student).

There are other potential contracting opportunities between several agencies that have similar service areas, serve similar population groups, and/or have indicated willingness to contract service.

For example, the Arc of Ulster-Greene and Gateway Industries currently have vehicles that are unused during the midday hours and/or during evening hours and on weekends. Those vehicle hours could be used to provide service under contract to other organizations that wish to expand their services or utilize extra vehicle capacity during peak times in a cost-effective way.

Unused capacity when vehicles are in use could be purchased by other organizations –such as UCAT, for example—to expand transportation options in unserved areas cost-effectively. the Arc of Ulster-Greene is currently providing general public service on its daily routes in Greene County, as part of Greene County Transit. ARC clients and general public riders are transported at the same times on those routes.

Purchase of service also enables organizations that would prefer to concentrate on their main mission rather than the operation of transportation services to take advantage of the resources of organizations with larger transportation programs. For example, Always There Home Care, UC Veterans Services, or Jewish Family Services may wish to purchase service from UCAT, ARC, or Gateway Industries.

Contracting for service could also happen between 5310 providers and other non-profit human service organizations whose clients have similar transportation needs and which may not want to provide transportation themselves. Non-profit organizations that serve similar population groups can contract with 5310 operators, thereby purchasing transportation for their clients during periods when the 5310 vehicles have downtime.

After determining that a purchase of service agreement would benefit both parties, the provider who is “selling” transportation services should serve as the lead agency responsible for developing the cost allocation plan and setting up guidelines for vehicle usage.

Examples of Best Practices

Medical Motor Services in Rochester is heading up an effort with three other NYS Office for Persons with Developmental Disabilities (OPWDD) providers to pool client and trip data. Medical Motor Services is using its scheduling software to identify “rideshare” trips (i.e., trips for clients of different providers riding on same vehicle). The goal is to shorten ride times for customers and reduce duplication/cost. After a somewhat lengthy effort to consolidate data, the coordination partners began to identify trips that could be more efficiently scheduled on other providers’ vehicles in July 2016.

In addition to its development of a Transportation Management Coordination Center for its six-county region, the **Lower Savannah Council of Governments** in Aiken, SC expanded service to two unserved counties by utilizing available seats on the existing vehicles of human service transportation providers. In Allendale County (population 11,000), human service agencies pooled vehicles, agreed to open their services to the general public, and established a standard per-mile reimbursement rate. Participating agencies included the Local Disabilities and Special Needs Board, the county Office on Aging (which also provided Medicaid non-emergency medical transportation for the county), and a local rural health center. A Mobility Manager, housed in a regional transit authority in a neighboring region, takes trip requests and schedules them onto vehicles. The service began operation in 2004 and by 2013, ridership had doubled to over 1,000 rides per month. The success of the service, known as the Allendale County Scooter, led to its replication in Bamberg County.

Marana Health Center provides transportation to three other clinics in the Tucson area with the organization’s non-lien 5310 vehicles, and provides limited transportation service for the

Santa Catalina Senior Center, operating a “fixed route” subscription service on Mondays, Tuesdays, and Thursdays for center clients.

Costs

The cost of purchasing service depends on the rate determined by the transportation provider using a cost allocation model, but should be similar to the full costs incurred by the purchasing organization to operate its own transportation services.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities—both capital and operating costs of contracted service—are eligible uses as part of the 55% portion of an area’s 5310 apportionment at 80% federal participation.

Potential Lead or Partner Organizations

- UCAT
- The Arc of Ulster-Greene
- Gateway Industries

VEHICLE SHARING BETWEEN TWO OR MORE AGENCIES: JOINT 5310 APPLICATIONS

Vehicle sharing is designed to reduce unnecessary vehicle expenses, resulting in a total fleet that is the right size for the region. This strategy allows providers with complementary vehicle requirements to share vehicles – for example, an agency that needs to use vehicles in the peak periods can be paired with one needing vehicles during mid-day periods or on weekends only. Vehicle sharing can reduce capital costs as well as operating costs for participating agencies. One way costs are saved is by reducing the number of vehicles that are insured. Vehicle sharing can also make accessible vehicles available to a wider range of passengers.

For this strategy to work, two or more agencies/organizations would join together to purchase one or more vehicles that would then be shared between them. This type of arrangement would require an agreement between the two agencies/organizations to determine the cost allocation and days/hours when each entity would use the vehicle. A lead agency would be responsible for storing the vehicle and providing maintenance and insurance; the other agencies would thus pay an additional fee to help cover these costs. Both agencies/organizations would be responsible for providing trained and licensed drivers and for fueling the vehicles based on use.

This strategy would support the use of Section 5310 funds to expand existing capital funding programs, while also improving the grant applications for applicants by actively working towards coordination.

Benefits

- Enhances existing community transportation resources
- Reduces capital investment in vehicles
- Reduces operating costs, especially for insurance
- Enhances ability to obtain capital grants where ranking includes coordination

Potential Challenges

- Different agencies have different insurance policies and driver requirements
- Gaining agreement on cost sharing
- Establishing protocols regarding process for reporting of mechanical problems, etc.
- Shared vehicles accrue more miles, so may need to be replaced sooner

Application for Ulster County

In Ulster County, a vehicle sharing program could be implemented in concert with future rounds of 5310 funding. Two or more agencies could apply for 5310 vehicles jointly, and receive higher scores in the 5310 application process because of their coordination. This strategy is relevant for long-term 5310 grant planning; two agencies that serve similar population groups in the same geographic area can decide to purchase a shared 5310 vehicle instead of purchasing two vehicles in order to coordinate services and reduce costs.

At least two organizations in Ulster County utilize Section 5310 funding: the Arc of Ulster-Greene and Ulster County Area Transit.

A lead agency would need to be identified to store, maintain, and insure the vehicle, while the “borrowing” organization would utilize the vehicle on a predetermined schedule, paying an hourly or daily fee.

Examples of Best Practices

Jefferson Union High School in Daly City, California (JUHSD) joined with the Pacific Forest and Watershed Lands Stewardship Council and the City of Daly City to purchase five new vans for the purpose of supporting outdoor activities for teenagers. During school days, JUHSD has first priority for the use of the vans, but Daly City has priority access to the vans during breaks and after school. The two entities also share maintenance and insurance expenses for the vans. In addition, JUHSD rents its other vehicles to the municipalities of Daly City, Brisbane, Pacifica and Colma (the communities served by the school district) for after-school activities and general use. JUHSD has 10 school buses and eight 10-passenger vans as well as the five vans in the shared fleet with Daly City.

Costs

Vehicle sharing would involve some portion of staff time for each participating organization to coordinate with the other, but likely not a significant amount. The actual amount of time and resources required would depend on how the vehicle sharing program is structured. Another factor in vehicle sharing involves addressing liability issues, i.e. who insures the vehicle, what is needed to ensure that all drivers meet the insurer’s standards, etc. See Appendix C for more information about insurance and liability issues (and others) related to vehicle sharing and coordination.

Vehicle sharing between agencies would also result in operational cost savings (fuel, maintenance, insurance) to the extent that the number of 5310 vehicles operated by the participating agencies is reduced.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities—the administrative costs of vehicle sharing between agencies could be funded as a mobility management project with the 55% portion of the region’s 5310 funding, at 80% federal participation.

Potential Lead or Partner Organizations

- Mobility Manager to coordinate

VEHICLE SHARING POOL

Vehicle sharing is designed to reduce unnecessary vehicle expenses, resulting in a total fleet that is the right size for the region. A vehicle sharing pool operates using donated vehicles and/or vehicles purchased with Section 5310 funding. The donated or purchased vehicles would be added to the pool of shared vehicles and rented on a recurring schedule or for one-time use by human service and non-profit organizations that join the program as members. The fees collected from the membership program could be used as the local match for the 5310 grant.

The donating agency/organization has first priority for the vehicles and schedules the vehicles for specific periods during the week/weekend to fit its normal transportation schedule. During periods when the donating agency is not using the vehicle, such as in the middle of the day, in the evenings, or on the weekends, the vehicle would be available for either subscription or one-time use by other organization.

Member fees pay for vehicle maintenance and insurance costs. A lead agency will collect fees, administer the program, and provide insurance and maintenance for the vehicles. Members will provide their own drivers (who are trained by the lead agency) and pay to fuel the vehicles.

Benefits

- Enhances existing community transportation resources
- Reduces capital investment in vehicles
- Reduces operating costs especially for insurance
- Enhances ability to obtain capital grants where ranking includes coordination

Potential Challenges

- Different agencies have different insurance policies and driver requirements
- Gaining agreement on cost sharing
- Establishing protocols regarding process for sharing, reporting of mechanical problems, etc.
- Shared vehicles accrue more miles, so may need to be replaced sooner

Application for Ulster County

Similar to the ValleyRide program described in detail below, a vehicle sharing program in Ulster County could operate using donated vehicles and/or vehicles purchased with Section 5310 funding. The strategy benefits all participating providers because it reduces the overall number of vehicles that need to be purchased and creates a system where only one provider is responsible for storing and maintaining the vehicles. It also offers an opportunity to increase annual mileage on vehicles that are not fully utilized at present.

All interested organizations could “donate” vehicles into the vehicle pool and be able to use them for the daily hours that they are currently used; however, during the hours that they are unused, such as in the evenings and on weekends, any other organization (that is pre-qualified and insured) would be able to “rent” the vehicles for transporting their own clients.

An agency that already operates a large fleet and has a system set up for insurance, maintenance and scheduling/dispatching should act as the lead agency to manage the vehicle pool and provide driver training to the borrowing agency drivers. the Arc of Ulster-Greene and Gateway Industries operate the largest vehicle fleets and may be subject to fewer constraints regarding vehicle

maintenance practices than UCAT; either one of those organizations could potentially act as the lead agency for this strategy.

Examples of Best Practices

The GoRide Vehicle Sharing Program at ValleyRide (Valley Regional Transit, or VRT) in Idaho is a pool of vehicles for human service agencies and non-profit organizations in Ada and Canyon Counties to use when needed. The pool of GoRide vehicles includes a variety of vehicle sizes and vehicles with wheelchair lifts. Agencies and organizations can join the GoRide Vehicle Sharing program and must have a least one driver certified. All drivers operating a GoRide vehicle must be approved prior to the agency or organization requesting a vehicle. There are three types of memberships: Annual Donating, Annual Participating and Participating. A Donating Member is an agency or organization that currently has a vehicle but does not need it seven days a week, or only uses the vehicle during the day or evening. The Annual Donating Member donates their vehicle to the GoRide Vehicle Sharing Program. In exchange, VRT insures and maintains the vehicle. GoRide staff use Kelly Blue Book trade-in value for cars and vans and resale value for buses to determine the value of the donated vehicle. At this point, VRT becomes the owner of the vehicle and the van or bus goes into service as a shared vehicle. The value of the vehicle is credited toward the cost of the Donating Members' annual membership cost.

Costs

The vehicle sharing pool program administration will require approximately 10%-20% of the lead agency employee's time (about \$6,000-\$12,000 each year). The actual amount of time and resources required would depend on how the vehicle sharing program is structured. Another factor in creating the vehicle sharing program involves addressing liability issues, i.e. who insures the vehicle, what is needed to ensure that all drivers meet the insurer's standards, etc.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities— the administrative costs of a vehicle pool program could be funded as a mobility management project with the 55% portion of the region's 5310 funding, at 80% federal participation.

Potential Lead or Partner Organizations

- The Arc of Ulster-Greene or Gateway Industries as potential lead agency
- All providers in Ulster County as donators of vehicles
- Mobility Manager to coordinate

PROVISION OF VEHICLES TO COMMUNITY ORGANIZATIONS

A community van program such as those operated by a number of transit providers in Washington, Portland, Oregon, and California, two of which are described below, is a third option for vehicle sharing. Through such a program, a provider that has vehicles that are due for retirement but still in usable condition could offer them and other supports to other providers, perhaps in exchange for the provision of a minimum number of trips for the donating agency's customers as well as service to their own clients.

Benefits

- Reduced vehicle acquisition cost for smaller providers
- More use of existing vehicles
- Cost-effective trips for donating agency, if recipient is required to provide a certain number of trips

Potential Challenges

- Recipient is typically responsible for maintenance and insurance costs

Application for Ulster County

UCAT, Gateway Industries, and the Arc of Ulster-Greene operate the largest vehicle fleets and presumably have the most regular vehicle replacement programs (although ARC and Gateway Industries reported having difficulty with timely vehicle replacements over the past few years.) Following the models below of very successful community van programs in Washington and Oregon, UCAT would be the logical provider of vehicles to smaller organizations.

Examples of Best Practices

King County Metro, Community Access Transportation Program

King County Metro's Community Access Transportation Program (CAT) was established over ten years ago in an effort to increase cost-effective transportation options for seniors and people with disabilities and address gaps in Access, Metro's ADA paratransit service. The program has three components; the Advantage program is discussed here (other components are Vanworks and Vanpool Subsidy).

Through Advantage, nonprofit agencies that provide services to seniors or people with disabilities are eligible to receive new or retired accessible vans from Metro. The transit agency also provides vehicle inspections and maintenance (about \$2,000 per vehicle annually), and driver training. For some organizations, Metro may also provide up to \$10,000 or more to cover fuel, insurance, and administrative labor expenses. In return, the nonprofit organization supplies drivers and insurance (general liability, auto liability, worker's compensation, and employer's liability or stop gap coverage), and agrees to make service open to the public and to provide 150 one-way trips per month for ADA-eligible customers.

To decrease the burden that carrying the required types and levels of insurance imposes on smaller agencies, the State of Washington established an insurance consortium through which participating agencies can obtain insurance at reasonable rates.

King County retains title to the vehicles, which enables Metro to monitor and enforce compliance with the terms of the agreements with nonprofit agencies.

The program is attractive to community organizations because it gives them resources to provide transportation for their clients/customers at a reduced cost and without the need to worry about vehicle procurement or maintenance service. As long as they meet their obligation to provide at least 150 ADA trips per month, they may use the vehicle as they choose, to meet specific community/agency needs without the geographic, temporal, and eligibility constraints of ADA paratransit service.

Metro benefits from reduced expenditures for ADA paratransit service. As shown in Figure 3, 40-50% of the trips provided by CAT partner organizations each year are made by ADA-eligible individuals, at a much lower cost per trip than the Access average—\$4 to \$5 per trip as compared to \$36 to \$42. Annually, this amounted to a savings of \$5 million for Metro in 2011. As described in Metro’s 2014 strategic plan, the program continues to expand, with the result that ADA ridership declined slightly in 2013.

Figure 3 King County Metro Community Access Transportation (CAT) Program Data

Data	2007	2008	2009	2010	2011
Partnerships	20	23	25	25	24
Vans	53	60	76	86	93
Rides	141,368	155,456	211,417	250,369	303,506
% ADA rides	41%	38%	45%	47%	49%
% non-ADA rides	59%	62%	55%	53%	51%
CAT cost/ride	\$5.00	\$4.80	\$4.16	\$4.59	\$4.51
Access cost/ride	\$36.15	\$39.17	\$38.48	\$38.64	\$42.11
Cost savings to Metro	\$1,388,446	\$1,567,712	\$2,781,402	\$3,397,708	\$4,893,700

Source: King County Metro CAT presentation and case study prepared by Nelson\Nygaard for Dallas Area Rapid Transit (DART).

Pierce Transit Care-a-Van Program

Pierce Transit, located in Pierce County, Washington, recently established its Care-a-Van program, which will operate in a similar fashion to King County Metro’s CAT program. Accessible vans scheduled for retirement will be transferred to competitively selected nonprofit organizations that serve seniors, people with disabilities, and other populations. Recipients will agree to provide a certain number of trips—enough trips to equal or exceed the value of the vehicle—that otherwise would not be available or that would be more costly for Pierce Transit to provide.

Unlike the King County program, however, recipient organizations will be responsible for providing vehicle maintenance as well as required insurance coverage, and vehicle titles will be transferred to the recipient organizations once they have met operational and administrative requirements such as providing the required number of trips, obtaining insurance coverage, and submitting monthly reports.

In addition to improving mobility for community residents, Pierce Transit expects to realize savings from reduced demand for ADA paratransit trips.

Costs

As shown in the examples above, a community van program typically generates savings to the transit agency that offers vehicles to community organization in exchange for the operation of a certain number of paratransit trips. The recipient organization would be responsible for vehicle maintenance and insurance costs, but would save the cost of acquiring the vehicle.

Potential Lead Agency

- UCAT

TRAVEL TRAINING PROGRAM

People who have never used public transportation often have real concerns and fears about using the public transportation network. This strategy has many of the same goals of a bus buddy program, but is more formalized. A training program that teaches consumers how to use public transportation and become confident transit riders can help encourage use of public transit. Travel training may be promoted as a marketing strategy to encourage key consumer groups (i.e., older adults) to use public transit; or it may be targeted towards frequent users of paratransit to encourage individuals to use lower-cost fixed route services, as appropriate to the individual's circumstances.

Benefits

- Encourages and support use of local fixed-route services
- May reduce demand for paratransit services
- Increases awareness and use of a variety of community transportation services
- May support other regional priorities, such as workforce development

Potential Challenges

- Some audiences and individuals may require specialized training
- Requires multiple-agency cooperation to identify training opportunities
- Training may require support from agencies that perceive no, or minimal, long term gain

Application for Ulster County

Currently, the Ulster County Office for the Aging and Ulster County Area Transit (UCAT) both offer travel training programs. The Office for the Aging program is offered to seniors who want to learn how to use the fixed route system, while UCAT's program is open to the general public (including seniors and people with disabilities). These programs could be merged and/or expanded and marketed to a wider range of trainees.

Costs

Costs to combine the two programs would likely be minimal, and consist primarily of staff time to identify overlapping functions (recruitment, assessment of initial skill level and most appropriate training method, training time, recordkeeping), determine the best approach to consolidation, and market the new combined program. Should the number of trainees increase significantly, a part-time or full-time trainer may become necessary in the future.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities—45% portion of annual apportionment, at 50% federal participation.

Potential Lead or Partner Organizations

FLEX VOUCHER PROGRAM (WITH VOLUNTEER DRIVERS)

Flexible vouchers (also called flex vouchers) can be issued or sold to eligible individuals and used to purchase trips from public or private transportation providers, taxicabs, or to reimburse friends/family members and volunteer drivers. Typically, sponsoring agencies subsidize the cost of the trips, so that riders are able to receive service at a reduced cost. Eligibility is based on age, disability, income criteria, or the need for a specific type of trip, such as employment transportation.

Flex voucher programs, particularly those that may be used with any type of service and recognize family members or friends as eligible providers of service, could fill temporal and geographic gaps in fixed-route and demand-response service by providing an affordable and convenient option. Such programs also expand the number of volunteer drivers that are available through other programs to provide rides for eligible individuals.

Similar to other types of programs that provide subsidies to individuals rather than to transportation providers, flex voucher programs are consumer-driven, and allow consumers to control resources directly and make their own decisions about service providers. Other advantages include low start-up and administrative costs, support for existing transportation providers and services, and the flexibility to adapt to a variety of local conditions.

Typically, a lead agency will implement and manage a voucher program through a Mobility Management program.

Benefits

- Voucher programs maximize use of existing volunteer driver programs
- Programs can allow volunteers to be reimbursed to expand transportation options
- Voucher programs offer an affordable option for long-distance trips
- Users have their choice of transportation provider
- Low start-up costs

Potential Challenges

- Voucher programs require a lead agency to assume responsibility for day-to-day administration
- Sponsor agencies are needed to subsidize the cost of trips for their customers or clients
- Measures must be implemented to prevent fraud

Application for Ulster County

In Ulster County, a flex voucher program could be implemented initially to complement the Neighbor-to-Neighbor volunteer driver programs operated by the Office for the Aging, and expanded at a later date to include other sponsor agencies, eligible individuals, and participating service providers.

The Office for the Aging noted that requests for rides via the Neighbor-to-Neighbor program have increased rapidly in the past year; without additional volunteers the program may need to start turning down riders.

Since driver recruitment is such a significant challenge, the voucher program could operate as a method of transferring the recruitment and retention of drivers from the Office for the Aging to their member participants. Office for Aging would provide funding for the vouchers and distribute them to participants with guidelines on finding drivers (primarily friends and family members) outside of the volunteer driver pool currently available to OFA.

In the longer term, an Ulster County Mobility Manager could be responsible for developing the vouchers and working with the Office for the Aging initially. The Mobility Manager would be responsible for receiving funding and participant referrals from the Office for Aging, receiving completed vouchers from participants, and processing payments to the volunteer drivers. In concert with the Office for the Aging, the Ulster County Mobility Manager would also develop and implement fraud controls, such as a secure numbering system.

If the program were expanded, additional organizations could choose to sponsor trips for their customer groups. Sponsoring entities would have a say in the governing policies of the program, would set their own eligibility standards, and would likely provide oversight through an advisory committee structure. Referring agencies (likely the same as sponsoring entities) would identify participants who do not have any other transportation options and would help to screen applicants and prevent fraud. Agencies/organizations that could serve as sponsoring/referring entities include Jewish Family Services, Always There Home Care, Family of Woodstock, Inc. and others. These organizations have customers who are likely to have needs for types of trips beyond those that are provided by the organization, such as grocery trips. The voucher program could also serve as a means of providing occasional trips or those that aren't cost-effective for providers to serve—such as ADA trips, or trips from outlying areas to connect riders with fixed route services or destinations in population centers. ARC or Gateway Industries, which have clients throughout the county, would be potential providers for such trips.

The responsibilities of Ulster County's Mobility Manager would expand to include developing the vouchers for all sponsor agencies, recruiting sponsors and coordinating sponsorships, raising funds to support subsidies, and working with the transportation providers.

Transportation vendors participating in an expanded flex voucher program could include public transportation providers, private transportation operators, taxi companies, and established volunteer driver programs (OFA's Neighbor-to-Neighbor), as well as friends and family members recruited by participating individuals.

Examples of Best Practices

TRIP Volunteer Driver Program Model, located in Riverside, California is the original TRIP program (Transportation Reimbursement and Information Program), providing a low-cost, low maintenance, customer-driven approach for providing transportation to older adults. The TRIP program reimburses volunteers to transport individuals where no transit service exists or when an individual is unable to use public transit. TRIP participants recruit their own volunteers from friends and neighbors. The participant rides for free. At the end of each month, participants send in their requests for mileage reimbursements for their volunteer drivers, including the following information: dates of travel, reasons for travel, origin, destination, miles driven, driver identification, and length of trip. These details are entered into the program software, TripTrak, which will then calculate the amount needed for reimbursement. The TRIP program has been replicated in at least eight other locations in California, Illinois, Kansas, Massachusetts, and Michigan. The model is successful because it does not rely on program staff to recruit drivers or schedule rides, and the agency administering the program does not need to own any vehicles or

charge fees to users. It creates a system of self-management and self-esteem among participants because they are responsible for recruiting their own drivers and managing trip information. Riders and drivers have a mutual agreement regarding scheduling rides to specified destinations. In addition, riders are comfortable with drivers because they already know them. The model also separates the sponsor agency from the driver, which lowers liability and insurance costs.

See Appendix D for more information about the operation of the TRIP model in other areas.

The Bear River Association of Governments (BRAG) in Utah launched the BRAG Medical Voucher Program in June 2014. The program provides an innovative non-emergency medical flexible transportation voucher program specifically targeted at helping individuals who were not being served by current transportation resources in the region. BRAG serves as the program administrator, which involves coordinating with partnering / referring organizations, participant and trip eligibility determination, issuing flex vouchers, and reimbursing trip providers. Referring agencies, such as local non-profits, refer clients to the program who meet disability and financial eligibility criteria. Participants are then allocated a maximum of \$400 per year to pay for transportation to medical appointments; vouchers are distributed based on need every six months. The customer arranges for the particular mode of travel and provides vouchers to an eligible provider or driver. The eligible driver accepts the voucher as payment for the rides provided and redeems the voucher for the cash value from the BRAG program administrator. Voucher trip can be arranged with individual drivers, private operators, and non-profit or human services transportation operators. The program launched in June 2014 with a \$10,000 budget, and was granted an additional \$100,000 shortly thereafter to expand the program to several additional groups and geographic regions.

Costs

Start-up and Ongoing Administration

Development and implementation of a program focused on Office for Aging customers would require perhaps up to 15% of the Ulster County Mobility Manager's time initially or up to about \$9,000 in the first year. A broader program would require more time for development and ongoing operation, up to 30%, or \$18,000 in a year—comprehensive voucher programs can require a full-time staff person to identify sponsor agencies, work with an advisory council, and accomplish all planning and implementation activities, plus a part-time administrative position to assist with ongoing operations. Start-up costs might also include the purchase or development of a simple software tool to track customers, trips, and reimbursements.

Working with sponsor agencies, the Ulster County Mobility Manager could administer a flex voucher program on an ongoing basis using about 5-10% of a full-time position or about \$3,000-6,000/year for a program focused on Office for Aging customers, and about 15-20%, or \$9,000-12,000 for an expanded program. Ongoing operational expenses apart from reimbursements to drivers or other service providers, such as the printing of vouchers, would be minimal.

One approach to implementing a flex voucher program would be to replicate the TRIP model, with the assistance of the program's creator, Independent Living Partnership (ILP). ILP recommends a two-day training with staff of the original program in Riverside, CA at a cost of \$375 per person; most organizations send two staff members to the training. An annual TripTrak software subscription costs \$2.50 per service day, for which ILP provides database management and administration and automatic program updates. Use of TripTrak also requires a start-up license fee of \$275, renewable for \$125 annually. Implementing a voucher program internally

would involve lower out-of-pocket expenses, but would require staff time on the part of the PAG Mobility Manager and participating agencies, as noted above.

Trip Subsidies

One of the flexible aspects of a voucher program is that levels of subsidy per user and total annual subsidy amount can be set by the sponsoring entities based on the level of funding available to them.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities—45% portion of annual apportionment, at 50% federal participation. Note that administrative costs associated with a voucher program and the cost of vouchers used by older adults and people with disabilities to purchase trips from taxi providers, human service agencies, and volunteer drivers are eligible 5310 expenses. While vouchers for public fixed-route and ADA paratransit trips could be provided to customers, and other groups (such as rural area residents) could be included in a voucher program together with older adults and people with disabilities, 5310 funds may not be used to cover the costs of those trips.
- Sponsorship by human service agencies
- Private foundation grants

Potential Lead or Partner Organizations

- Ulster County Office for the Aging
- Mobility Manager

VAN POOL SERVICE FOR JOB ACCESS

Vanpool is the organized, shared use of a vehicle by people traveling to the same destination. The van is typically provided by a local transit authority, nonprofit group or employer. The vanpool is incentivized by allowing participants to use special facilities, such as high occupancy vehicle (HOV) lanes and preferred parking. Participation in a vanpool is further incentivized by decreased costs from gas and vehicle maintenance. Typically, vanpool members work out agreements amongst themselves for paying for gas and vehicle maintenance, as well as scheduling which member will drive the vehicle.

Vanpool services are most attractive to employees commuting from transit-poor locations. In addition, the potential cost-savings and opportunity for preferred parking can also make vanpooling a desirable option. For employers interested in setting up a vanpool service, one of the simplest ways is to purchase a “sprinter van.” These vans do not require special licenses, so they can be used for meetings as well as commuting purposes.

Benefits

- Opens job markets to persons with low income and other transit-dependent individuals
- Partnerships with employers may provide opportunities to reduce costs
- Eligibility for Job Access Reverse Commute (JARC) funding

Potential Challenges

- Vanpools can be relatively easily implemented but require financing
- Vanpools require partnerships with employers or local agencies/organizations

Application for Ulster County

While the majority of major employers in Ulster County are located near public transportation provided by Kingston Citibus or UCAT, a number of employers are not. These include a cluster of employers north of Saugerties as well as employers on the outskirts of New Paltz. Employers located more than a mile away from the fixed route transit system include:

- Carpenters Local 279 Council in Edison
- Elna Magnetics in Saugerties
- Mohonk Mountain House in New Paltz
- First Student in Saugerties
- Gillette Creamery in Gardiner
- LoDolce Machine Company, Inc. in Saugerties
- Prism Solar Technologies, Inc. in Highland
- Tongore Pines Senior Housing in Olivebridge

A vanpool service could provide a cost-effective link for individuals to access opportunities with these employers. The Ulster Mobility Manager could partner with one or more of these employers to provide a subsidy for gas, mileage, maintenance, and pay to purchase a van. The van

participants would then pay a small fee for riding; the driver would ride for free and keep the van at his/her house.

Examples of Best Practices

Pace's Vanpool Services, Pace, IL is comprised of four different programs, the Advantage Program, the Vanpool Incentive program, and a traditional ride share program. The Advantage Program provides a transit alternative to persons with disabilities that commute on a regular basis to work sites or rehabilitative workshops. This program not only provides service to persons who might otherwise request ADA paratransit service from Pace, it also is an alternative for those people living outside the $\frac{3}{4}$ mile ADA paratransit service area. The Vanpool Incentive program provides a group of commuters with a van and pays for fuel, maintenance, insurance, and tolls for a flat, monthly fare.

Costs

Costs vary by route distance and hours of operation. A sprinter van typically costs around \$40,000, plus operating expenses.

Potential Funding Sources

- Section 5310 Enhanced Mobility for Seniors and People with Disabilities
- Section 5307 Urban Area Formula Grants

Potential Lead or Partner Organizations

- Local employers
- Mobility Manager

MOBILITY MANAGER

Mobility Managers serve as policy coordinators, operations service brokers, and customer travel navigators. They help communities develop transportation coordination plans, programs, and policies, and build local partnerships. A Mobility Manager might help coordinate support functions for community transportation services, perhaps eventually taking on the call center function for multiple community transportation providers and/or becoming the broker of a coordinated system. A Mobility Manager might also serve to organize and manage a taxi subsidy program on behalf of sponsoring organizations.

Typical Mobility Manager functions include:

- Chairing a coordination council or advisory group
- Provide education and outreach to market transportation services, recruit new partner organizations, and garner community support
- Help individuals find the most appropriate transportation option for their needs
- Coordinate 5310 applications and compile reports
- Spearhead coordinated plan updates
- Coordinate travel training, assist with vehicle sharing programs, administer voucher programs
- Provide technical assistance to transportation providers
- Oversee coordinated operations, such as a one-call/one-click system or centralized scheduling and dispatch

A key component of a successful mobility management program, and one of the most critical roles for the Mobility Manager, is the establishment of a mobility management advisory group. The group should include transportation providers, funders, partner organizations and other stakeholders, and advocacy groups. With the support of the Mobility Manager, this advisory committee can identify potential mobility management activities for the region, provide input and feedback as they are developed and implemented, and foster ongoing working relationships among the members of the group.

Individuals or organizations that are hired to provide mobility management functions often require training and ongoing technical support. Therefore, it behooves a responsible organization such as a State DOT, an MPO/RPA, or a transit agency to make sure that Mobility Managers in their region are properly trained and supported.

Benefits

- Ensures that staff resources are available to implement mobility and coordination strategies
- Creates a community resource to promote existing and available transportation programs and services
- Can highlight mobility challenges and opportunities and raise awareness

Potential Challenges

- Mobility Managers with the full range of range of required skills may be difficult to find
- Individuals who are Mobility Managers will need to adopt an entrepreneurial approach and be well supported by key institutions and organizations to be effective

- Implementing programs and creating awareness can result in improved effectiveness and efficiency
- Individuals will likely need training and support
- Requires matching funding from sponsoring agency

Application for Ulster County

Most of the Mobility Management strategies recommended in this chapter should be planned and executed by a dedicated part-time or full-time Mobility Manager at the county or regional level. Ulster County could procure a Mobility Manager to implement county-level strategies or Ulster County agencies could band together to hire a Mobility Manager to implement strategies across multiple counties.

The Mobility Manager should also tap into the statewide New York Mobility Management Network (summarized in Chapter 4) which allows Mobility Managers to connect and share information. Moreover, the Mobility Manager should tap into state and national Mobility Management training programs and conferences to develop an understanding of key strategies, implementation tactics, and evaluation measures.

Examples of Best Practices

Please see New York State Mobility Management Highlighted Programs in Chapter 4.

Costs

The annual salary cost of a (single) Mobility Manager (overhead and program function cost additional) might range between \$30,000 and \$60,000, depending on whether the Mobility Manager is part- or full-time. The cost to train and support Mobility Managers is estimated to be between \$50,000 and \$100,000 per year, and might best be accomplished through a consulting contract unless in-house expertise in this area is developed.

Potential Funding Sources

The cost of funding a Mobility Manager is allowed under Section 5310 Enhanced Mobility for Seniors and People with Disabilities and Section 5307 Urban Area Formula Grants under the presumption that the Mobility Manager provides functions pertinent to each program. In each case, this is considered to be a capital cost, and hence, Federal funds from these programs are available at an 80/20 match.

Mobility Managers in other New York counties are supported by New York State Operating Assistance (STOA), county funds, contributions from partner organizations, and in-kind services as well as Section 5310 funds.

Potential Lead or Partner Organizations

Entities housing the Mobility Managers across New York State include public transit systems, county Offices for the Aging or Departments of Social Services, rural health networks, local chapters of NYSARC, municipalities, and nonprofit organizations.

4 MOBILITY MANAGEMENT PROGRAMS IN NEW YORK STATE

NEW YORK MOBILITY MANAGERS NETWORK

The New York Mobility Managers Network is a voluntary group to further the practice of mobility management in the state. The group shares information, plans events, and discusses pertinent mobility topics via an online project management site called Basecamp. As of May 2016, there were 80 people who subscribe to this group, 118 active discussion topics, 101 shared files, and one upcoming event, the Mobility Solutions Summit.

A **Mobility Solutions Summit** was held on June 23-25, 2016 in Ithaca, NY, bringing together mobility managers, transportation planners, and advocates to discuss two topics: shared-use mobility and better practices.

- Shared-use mobility sessions explored bike share, car share and ridesourcing services such as Uber and Lyft and how they may be used in Upstate NY. The sessions also explored attributes of successful non-profit community car share services, regulatory barriers to shared-use mobility services before the NYS Legislature in 2016, and relationships between shared-use mobility and conventional public transportation.
- Better Practices sessions explored the business and policy cases for innovative mobility services, public policy/planning, mobility management and mobility technologies.

MOBILITY MANAGEMENT CASE STUDIES

Below are three successful mobility management programs in New York State in counties with similar demographics and transportation gaps and needs as Ulster County.

Allegany County

Ardent Solutions (formerly the Allegany/Western Steuben Rural Health Network), founded in 1994, is an established, highly visible rural health network comprised of service providers and community leaders. The organization works to improve access to care, increase effectiveness and efficiency of service delivery, and build organizational capacity for agencies. It houses the ACCESS Allegany Mobility Management Office and ACCESS Allegany Call Center. The Allegany County transit system is branded as “ACCESS Allegany;” public and private transit providers under this umbrella are coordinated.

Ardent Solutions employs a Mobility Manager, a Mobility Quality Assurances Coordinator, and a Call Center Coordinator.

Mobility Management Strategies

Priority mobility management activities for Allegany County include:

- A car/van pooling (ride share) program coordinated with the 511NYRideshare program for travelers with similar interests and destinations to assist in cost saving for those commuting long distances to work.
- A volunteer driver program to fill transportation gaps organized through the Office of Aging and providing reimbursements of \$4.00 per ride.
- A coherent coordinated transit system that maximizes the productivity of the existing transportation providers by maximizing under-utilized capacity.
- A comprehensive social marketing plan for public transportation that is working to raise awareness of transportation throughout the county.
- The Access Allegany Travel Training program teaches people with disabilities and older adults to travel safely and independently using public transportation. The program is free and open to all individuals. There is also a Training Workshop for those who completed the initial training session and want a more detailed and one-on-one experience.

ACCESS Allegany Call Center

The ACCESS Allegany One-Stop Call Center is managed by Ardent Solutions. The program provides trip planning for public transportation, as well as the brokerage of non-emergency medical transportation utilizing both public and private transit providers. The travel training program, volunteer driver program, and the rideshare program are also run through ACCESS Allegany.

The ACCESS Allegany website describes the organization's role as the mobility manager for Allegany County. It provides quick links for the six service areas and corresponding routes operated by the provider, as well as weekly schedules for each route. The website offers an overview of available services and information for how to contact the ACCESS Allegany Call Center. It also posts rider alerts and additional information like holiday schedules and links to social media. All of this information is provided on a clear, easy-to-read webpage.

Funding

Mobility management activities are primarily funded through FTA Section 5311, after transitioning away from the JARC and New Freedom funds that they received in the past. The state provides 10% match for the 5311 funds through the State Operating Assistance program. The county used to provide a 50% match; however, that contribution has been significantly reduced because many Ardent Solutions employees are paid through a contract with Rural Health Network which is considered an in kind contribution which has helped to reduce the county's funding requirements.

Schuyler County

The Arc of Schuyler County implemented a mobility management program after receiving a combination of JARC and New Freedom funds. With these funds, they hired a Mobility Manager to coordinate transportation and related issues in Schuyler County, including Schuyler County Transit, which serves the rural parts of the county and contracts with the ARC to operate service. The transit system has one fixed route that also deviates to provide demand-response service to seniors and people with disabilities. Additionally, a Dial-a-Ride service is available for non-emergency medical trips.

Schuyler County employs a Mobility Manager and a Call Center Representative.

Mobility Management Strategies

Priority mobility management activities for Schuyler County include:

- The Mobility Manager is coordinating with other counties to integrate regional transportation in the seven county region. This project is working to move some of the recommendations from the Regional Plan forward, including implementation of a regional transportation service to important hubs like the Regional Medical Center.
- They are piloting a ridesharing program to connect rural residents to employment in partnership with neighboring counties through the SouthernTierRideshare.com program (coordinated with Chemung and Steuben Counties). This project will be completed within the next year.
- They are working with Tri-County Mobility Managers to provide continued outreach to the veteran population and develop a rideshare program to help veterans access appointments at the Bath Veterans Medical Center.
- There is a travel training and bus buddy program to help people orient themselves with transit and how to ride the bus and understand the value of being connected.
- A volunteer driver program is run through the Office of Aging, administered through RSVP at Catholic Charities. Volunteer recruiting and scheduling is done through the Transportation Link-Line.

Transportation Link-Line Repository

The Transportation Link-Line, launched in 2014, is an information and assistance service that connects people in Schuyler County and neighboring communities with transportation options. Transportation Link-Line was funded by a one-time Veterans Transportation and Community Living Initiative (VTCLI) grant, NYS Department of Transportation, and Schuyler County Office for the Aging. The Link-Line will help with regional connectivity by pulling all transportation resources into one place. The service includes scheduling and routing software, a central repository of information, and a multimedia marketing and outreach campaign to educate the public. Utilizing remaining JARC / New Freedom grants, the Arc of Schuyler employs a part-time call center representative, the cost of which is split with the Office for the Aging. The online platform is operated by The Arc of Schuyler.

Funding

Schuyler County Mobility Management was previously funded by JARC and New Freedom grant programs, and these funds are still in use until they run out. The program is also funded with

Section 5310 grants with local match funds from the ARC of Schuyler. As noted above, the Transportation Link-Line was funded by a one-time VTCLI grant.

Tompkins County

Mobility Management is coordinated by the Tompkins County Department of Social Services (DSS). This effort was formed through a collaboration between public entities and private institutions under the oversight of the region's MPO (ITCTC). In 1997, three transit agencies were consolidated as Tompkins Consolidated Area Transit (TCAT). Since 2006 the DSS has had this responsibility, which is managed by a Chief Transportation Planner who acts as the Mobility Manager. Tompkins County DSS coordinates all TCAT transit services, Cornell University TDM efforts, the MPO, and other programs and initiatives are coordinated together through the DSS.

Mobility Management Strategies

- DSS utilizes the Way2Go program to administer many of its mobility management strategies, including the one-call/one-click resource, travel training, mobility manager outreach, and other programs (see below for more information).
- DSS is currently undertaking a needs analysis of mobility gaps and needs across Tompkins County.
- They have a car share membership program through Zimride, called the Tompkins Rideshare Program, which has 19,000 enrolled users and partners with 100 employers in the region.
- There is also a program to pay for taxi rides or car share to transport clients to job interviews.
- DSS recently embarked on a research project to explore the feasibility of creating a local app and pilot program to assist people with planning transportation through various modes: Medicaid transportation, ridesharing, public transit, taxi, car share, etc.
- Additionally, DSS oversees a volunteer driver program connecting people with transportation options to regional medical centers.

Way2Go Program

Way2Go, originally known as RideWise, is a community mobility education program created in 2009 to help meet Tompkins County's goals of increasing transportation equity and sustainability. The project was originally funded through Federal Transit Administration (FTA) Job Access and Reverse Commute (JARC) grant program administered by Tompkins County Department of Social Services. Way2Go partners with employers, human service agencies, transportation providers, advocates, policymakers, and other stakeholders. The Way2Go program has many features and projects, including:

- A one-call/one-click transportation repository to connect transportation providers, information services and support functions in an integrated system that allows individuals to conveniently find transportation information and support.
- Employer education program to reduce transportation as a barrier to employment through partnerships with local employers.
- Senior education program to educate seniors about transportation resources and ensure safe travel.

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Ulster County Transportation Council (UCTC)

- Travel training program to ensure that seniors and people with disabilities are able to access the transportation services they need by training them to use the fixed route service.
- Transportation for School Success works with ICSD school districts to promote awareness and use of transportation strategies and solutions to support equal access to activities.
- Regional Mobility Manager Outreach to support coordinated transportation education and marketing across counties in upstate NY to reduce regional transportation needs.

In the first quarter of 2015, Way2Go deployed a broad range of programs to address transportation needs and sustainability in Tompkins County. Over 194 individuals were directly reached by Way2Go events in the first quarter and nearly 10,000 viewers were reached through Way2Go's online and media content.

The Way2Go program was initially funded with JARC funding; now it is funded with primarily Section 5311 funds.

Funding

Tompkins County utilizes FTA Section 5307, 5309, 5311 funds which are all managed through the county. Section 5310 will be managed through the County soon as well. The County allocates 5307 funding for mobility management and operating assistance for non-public transit agency operations. They also flex Federal Highway Administration funds through the MPO to pay for mobility management projects.

5 LOCAL PRIORITIES AMONG POTENTIAL MOBILITY MANAGEMENT STRATEGIES

Stakeholder outreach included in this phase of the planning process included:

- A working group session among key staff members from Ulster County transportation providers to discuss potential coordination and mobility management strategies
- A combined meeting with both the Technical Advisory Council (TAC) and the Stakeholder Advisory Group (SAG) to review, discuss, and prioritize potential strategies

This chapter describes the results of those efforts.

TRANSPORTATION PROVIDER WORKING GROUP MEETING

Representatives of UCTC, UCAT, Gateway Industries, and the Arc of Ulster-Greene met to consider the operational issues associated with the mobility management strategies listed earlier in Figure 1. The use of unused vehicle hours or seating capacity on providers' vehicles to transport customers of other agencies or the general public, through contracting or vehicle sharing options, a flexible transportation voucher program, centralized trip scheduling, and a Mobility Manager generated much discussion.

With regard to contracting for service among agencies, the providers noted that they must comply with federal regulations associated with not only the 5310 program, but also the 5307 Formula Program for Urbanized Areas, and/or New York State Department of Motor Vehicles 19-A requirements for bus drivers, depending on their funding sources. Any contractors to these providers would be required to comply with the same requirements.

The most attractive strategies to these key providers included the following:

- Nonprofit providers' vehicles (5310 vehicles and others) used to complement or provide public service
- Vehicle sharing option #3: Used but still useful vehicles provided to smaller organizations, perhaps in exchange for provision of some trips
- Centralized call center and scheduling
- Combined and expanded travel training program
- Flex voucher program
- Joint branding and marketing
- Mobility Manager to develop, implement, oversee comprehensive program

TAC/SAG MEETING

Following the provider working group meeting, the TAC and SAG met jointly to discuss the potential mobility management strategies listed in Figure 1. (All of the providers that participated in the working group meeting are also members of the TAC, and took part in the second meeting as well). As a result of the discussion, twelve strategies were posted on the wall of the meeting room. Participants each received ten sticky dots and “voted” as they wished for their preferred strategies.

The voting resulted in the priorities shown in Figure 4.

Figure 4 TAC/SAG Ranking of Mobility Management Strategies

Strategy	Number of Votes	Rank
Mobility Manager to oversee comprehensive program	23	1
High-tech One-Call/One-Click system (high level of functionality including trip planning assistance, trip reservations, and centralized scheduling)	20	2
Flexible voucher program	14	3
Centralized scheduling/dispatch	13	4
Vehicle sharing—joint 5310 applications	9	5
Vehicle sharing—vehicle pool	9	5
Contracting for service among providers	9	5
Expanded travel training	4	6
Vanpool or ridematching program for work trips	3	7
Simple One-Call/One-Click system	2	8
Joint management/administrative activities	1	9
Vehicle sharing—provide used vehicles to other organizations (community van program)	0	10

After the voting, members of the group shared the reasoning behind their choices. Refined strategies, or implementation considerations associated with some actions, resulted from the discussion.

- **Joint 5310 applications**
 - Participants noted that this strategy could make the area’s limited 5310 funding go farther, and that could also support centralized scheduling and contracting for service.
- **Vehicle pool**
 - During the discussion about a pool of vehicles that would be overseen by one agency and available for others to use, it was noted that a mixed fleet would be important so that a variety of trips could be served using an appropriate vehicle: individual, group, wheelchair-accessible, and non-accessible trips, for example.

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- As well as established transportation providers, agencies that currently do not operate a transportation program, such as the Institute for Family Health, would be interested in participating in a vehicle pool as a way of getting clients to services when no other options are available.
- Several providers—including UCAT, ARC, and Gateway Industries—indicated that they would also be interested in a joint pool of qualified drivers that they could draw upon as needed. To be universally qualified, drivers would need to hold Commercial Drivers Licenses (CDLs) and meet the state’s 19-A requirements.
- **Contracting for service**
 - This option received support from both potential providers and purchasers of service. Some providers also see themselves as potential purchasers, and would like to see current contracting arrangements be reciprocal in the future.
 - As in the provider working group meeting, it was noted that organizations providing service under contract to those subject to FTA and NYS regulations would also need to be compliant with those requirements.
- **Centralized scheduling and dispatch**
 - Meeting participants saw a centralized call center as part of a centralized scheduling and dispatch strategy. SAG members noted that such a call center would be beneficial to agency staff members, such as care coordinators and care navigators, as well as potential riders.
 - It was also seen as important to include a regional AVL system as a component of a centralized scheduling and dispatch strategy.
 - TAC and SAG members saw centralized scheduling and dispatch as a strategy that could work together with vehicle sharing options and contracting for service to make the most efficient use of the transportation resources in the county.
- **High-tech one-call/one-click system**
 - TAC and SAG members indicated that the functionality of a one-call/one-click system should include the opportunity for a caller to book a trip and receive a confirmation number during their call or visit to the website
 - Personal assistance with trip planning over the phone would be a very important component of the system— to help people identify itineraries for complicated trips and to accommodate the roughly 50% of clients who either don’t have or don’t use computers. (Mobile apps are easier ways for people to get information, because most have smart phones in lieu of a home computer with internet access).
 - It was noted that a high-tech one-call/one-click with a sophisticated level of functionality would not be cost-effective if there are service gaps within the county—the investment in technology and staff to provide transportation information and plan and book trips would not be worth it if there are still trip needs for which no option exists.
 - The group agreed that a high-tech one-call/one-click, while desirable, is a strategy best pursued over the longer term than at present.

In addition to the top-ranked strategies already mentioned, a flexible voucher program including drivers identified by voucher recipients as eligible providers was one of the strategies that received a high number of votes.

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Ulster County Transportation Council (UCTC)

There was universal support for the establishment of a Mobility Manager position for Ulster County (not necessarily as part of a county department) to spearhead the development and implementation of individual strategies and ensure that coordination of transportation services in the county continues to progress.

SAG members also pointed out the need for pedestrian and bikeway improvements to make it easier for county residents to reach and use fixed route services. UCTC noted that bike/ped improvements are being made to address gaps as funding opportunities arise, and suggested that the bike/ped community be included in future meetings and discussions about coordination of services for older adults, people with disabilities, and human service agency clients.

6 RECOMMENDATIONS

This chapter presents a recommended approach to implementing the high and medium priority coordination and mobility management strategies identified by TAC and SAG members. Preliminary implementation steps for each strategy, estimated costs and potential funding sources, and an implementation timeframe are included.

SUMMARY OF RECOMMENDED MOBILITY MANAGEMENT STRATEGIES

Based on an analysis of current transportation programs and services and a varied public outreach effort, a number of actions that partner agencies in Ulster County could undertake to increase coordination of client and general public transportation services and improve mobility options for county residents and other stakeholders. Those mobility management strategies are:

- Hire a Mobility Manager to coordinate and oversee future mobility management activities
- Work toward the establishment, at some appropriate point in the future, a One-Call/One-Click system that offers the opportunity for customers to learn about suitable transportation options, receive personal assistance with trip planning, if needed, and reserve a trip, as well as centralized reservations and scheduling and capabilities for participating providers
- Develop a flex voucher program that includes drivers identified by voucher recipients as eligible providers of service
- Encourage and facilitate joint applications for 5310 vehicles among providers
- Establish a vehicle sharing pool
- Explore opportunities for contracting for service among the county's transportation providers
- Consolidate and expand the county's two existing travel training programs
- Offer a vanpool program and/or a ridematching service for work trips

Each of these strategies is summarized below. Strategies are shown in order of priority to TAC and SAG members, but the timeline presented later in the chapter shows an initial sequence for implementation of the strategies.

While vehicle replacements and other capital projects that may arise to meet the needs of older adults and people with disabilities, as well as the provision of operating assistance to 5310 sub-recipients, were not specifically discussed and ranked during the TAC/SAG meeting, public and human service transportation providers in Ulster County will continue to rely on 5310 as a source of funding for such projects. Therefore, continuing to provide funding for capital investments and operational needs for eligible applicants as resources allow is a strategy that Ulster County will pursue in addition to those listed below.

Mobility Manager (#1 ranking)

A full-time Mobility Manager will be critical to the successful development and implementation of other mobility management strategies in Ulster County. Without an individual who is charged with establishing relationships between affected stakeholders, promoting coordination and mobility management activities, and spearheading specific strategies and initiatives, and who has the resources (primarily time and skills) to pursue those objectives, mobility management activities are likely to progress slowly.

Following the example of Mobility Managers in other NY counties, Ulster County's Mobility Manager could be housed in a number of organizations: UCAT, the Ulster County Office for the Aging, the Arc of Ulster-Greene, a municipality, or another nonprofit organization that is stakeholder in human service transportation but not a transportation provider.

Rural health networks also serve as the Mobility Managers in other counties or multi-county regions, and are strong partners to transportation organizations in efforts to expand mobility options for residents and facilitate access to programs and services. At present, no rural health network covers Ulster County, but networks are in operation in Greene and Delaware Counties, Eastern Dutchess County, the South Central region that includes Broome, Tioga, and Delaware Counties, and the Mid-Hudson South region. The potential for locating an Ulster County Mobility Manager in one of these organizations should be explored.

Implementation Steps

1. A first priority project for stakeholders in Ulster County to take on is the establishment of an advisory group (Ulster County Mobility Management Advisory Committee or Ulster County Coordination Council, for example) to provide guidance as other strategies are developed and implemented. The group could include members of the TAC and SAG to start. This group should take on the task of hiring a Mobility Manager to work with the group and move implementation of other coordination strategies forward.
2. Develop Mobility Manager job description. Sample job descriptions are available at <http://nationalcenterformobilitymanagement.org/in-practice/> as a starting point. Mobility Managers in other NYS counties would also be a good resource to consult when identifying key job duties.

Previous experience in any of the following areas, plus an outgoing personality, would be valuable: public or human service transportation management or operations, project management, public outreach or coalition-building, and/or provision of technical assistance.

3. Evaluate alternative organizations to employ the Mobility Manager and select the most appropriate entity, and post the job opening through that organization's normal channels and those of stakeholders, and state and regional transportation organizations.
4. Conduct interviews. Include one or two members of the coordination council on the interview committee.
5. Hire qualified individual using housing entity's process.

Implementation Timeframe

Forming a coordination council and hiring a Mobility Manager should be the first strategy implemented by Ulster County stakeholders as part of this plan, so that the Mobility Manager can take over responsibility for moving forward with other strategies included in the plan and priority projects that may arise in the future. Forming a coordination council and getting a Mobility Manager onboard could take up to six months.

Potential Costs

A reasonable starting salary range for a qualified Mobility Manager might be \$50,000-60,000 per year. Note that an annual salary of \$60,000 per year was assumed when estimating the potential cost of other mobility management strategies that would require a percentage of the Mobility Manager's time. If a lower/higher annual salary is more appropriate for the Ulster County area, potential costs of those other strategies will be lower/higher as well.

One-Call/One-Click System (#2 ranking)

One-call/one-click systems typically provide centralized information about transportation services and may also offer assistance with trip planning and/or trip booking or the ability to book trips directly from the system. A wide range of options is available to organizations wishing to develop and implement such a system, from the transportation services that are included, the type of information and level of assistance that is provided to the customer, and the degree of technological sophistication. The benefits of such centralized services are typically the solution to a specific issue, such as a plethora of transportation services, characteristics, and requirements that customers must evaluate to identify an appropriate provider for a trip, or the need for customers to call different providers for different types of trips; better customer service; and maximum use of vehicle capacity (when trip schedules are shared among providers).

In Ulster County, stakeholders have indicated a preference for a one-call/one-click system that includes trip planning assistance (automated and personal) and trip booking options for users and facilitates joint scheduling and dispatching among the providers of public paratransit and human service transportation services in the county. These are functions that a more complex one-call/one-click system could facilitate. A centralized source of transportation information that customer could access over the phone, by speaking with a mobility specialist, or online would be a first step in the development and implementation of a more complex one-call/one-click in the future.

In the meantime, UCTC, UCAT, and Kingston Citibus are embarking in an effort to consolidate those two public transit systems. Presumably, one component of the consolidation will be a combined call center and centralized reservations, scheduling, and dispatch for the ADA paratransit services operated by UCAT and Citibus, UCAT's other demand-response services, including those now provided by UCAT for other organizations, such as OFA, Gateway Industries, and the Arc of Ulster-Greene. That call center and centralized reservations, scheduling, and dispatch system could form the nucleus of a broader centralization effort including all of the transportation providers in the county.

Because there are different technological approaches to a one-call/one-click system, especially one that offers the more complex trip planning, trip booking, and centralized scheduling functions, it is recommended that an analysis of the potential costs and benefits of a variety of one-call/one-click options be conducted at a future date.

Implementation Steps

1. Proceed with recommendations forthcoming from the UCAT/Citibus consolidation study for centralizing reservations, scheduling, and dispatch for those systems' demand-response services. Once functioning smoothly, add other organizations—Ulster County Veterans Services would be a good first addition.

Providers such as the Arc of Ulster-Greene and Gateway Industries could be added at a later time after arrangements for contracting among transportation providers (discussed below) have moved forward.

2. Visit Mobility Managers in other counties that have implemented call centers (Allegany, Schuylar, and Tompkins, for example) for advice and guidance. Some of these systems are utilizing the 211 services in their areas to provide transportation information to callers, with additional assistance from Mobility Managers, but could nonetheless be helpful to partners in Ulster county as they embark on similar projects.
3. Identify funding for a consultant study of one-call/one-click options for the county.
4. With guidance and input from the county coordination council, develop a scope of work and Request for Proposals (RFP) to evaluate the following options, including an assessment of the potential technology solutions for each as appropriate:
 - A simple one-call/one-click system that would expand on the consolidated UCAT/Citibus call center to provide information about the services provided by not only those organizations, but also additional transportation options available to all Ulster County travelers
 - Expansion of centralized reservations for the public paratransit services to other interested providers through a one-call/one-click system and the technological opportunities for providers to coordinate scheduling by viewing each other's' schedules or booking trips on each other's' vehicles
5. Advertise the project and obtain consultant services according to the lead agency's procurement guidelines.
6. Conduct the study, using a subset of members of the county coordination council as the project's TAC.

Prior to undertaking a formal planning study, guidance for developing a one-call/one-click system that best meets local needs could be obtained from two sources:

- The One Call – One Click Transportation Services Toolkit prepared by CTAA (<http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=2428&z=101>).
- Documentation from the development of TMCCs, available on the website of the U.S. DOT's ITS Joint Program Office website (<http://its.dot.gov/>) may also be helpful. New information about one-call/one-click centers developed using VTCLI grants from FTA was collected and analyzed as part of NCHRP 20-65 Task 60 to identify best practices for developing, marketing, evaluating, and using such information repositories as part of a regional mobility strategy. Findings are documented in the project's final report, along with a toolkit that offers guidance to state, regional, and local entities through a seven-step process for developing and implementing one-call/one-click systems. The report and toolkit can be found on the TRB website,

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<http://www.trb.org/Publications/Blurbs/174327.aspx> and
<http://www.trb.org/Publications/Blurbs/174328.aspx>.

Implementation Timeframe

This strategy will become more relevant as the number of stakeholders that are involved in mobility management activities through the regional advisory group increases, working relationships among the region's transportation providers develop more fully, and the Ulster County Mobility Manager has a chance to become established as a trusted, objective champion for coordination activities in the area. It is recommended that a consultant study be planned for 2018 or later, with the concurrence of the County's coordination advisory group. Such a study could be completed in six to nine months.

Potential Costs

Depending on the final scope of the consultant study, potential costs would probably be approximately \$50,000.

Flex Voucher Program (#3 ranking)

In Ulster County, a flex voucher program could be implemented initially to complement the Neighbor to Neighbor volunteer driver program operated by the Office for the Aging, and expanded at a later date to include other sponsor agencies, eligible individuals, and participating service providers. OFA would be the first sponsor and would refer individuals who can't be served by Neighbor to Neighbor because of a lack of an available volunteer to the program. Individuals would then recruit their own drivers. The Mobility Manager would be responsible for developing the vouchers and working with OFA initially.

Implementation Steps

Phase 1: Ulster County Office for the Aging

1. Meet with OFA to discuss the strategy and determine next steps related to sponsoring, voucher format, amounts, and design, member eligibility and notification, and other planning elements.
2. Design vouchers (different for each organization) and develop informational materials for educational/marketing purposes.
3. Present vouchers and informational materials to OFA customers at a community meeting.
4. Work with OFA to notify and educate eligible customers via email and/or mailed information.
5. Train OFA staff to educate and inform members and distribute vouchers.
6. Set up procedures for Mobility Manager to process used vouchers, keep budgets separate, and send payments to drivers.
7. Collect data and feedback for evaluation at the six month and year period.

Phase 2: Expanded to Additional Organizations

1. Determine whether the program for Ulster County will follow the TRIP model (described in Chapter 3) or if procedures and tools will be developed by the Mobility Manager.
2. Identify interested sponsor agencies.

3. Meet with potential sponsoring organizations to discuss next steps related to sponsoring, voucher format, amounts, and design, member eligibility and notification, and other planning elements.
4. Design vouchers to be identifiable by the different participating organizations and modify educational/marketing materials for the new organizations
5. Present vouchers and informational materials at a community meeting for customers of participating organizations (depending on the size these meetings can be grouped or singular by organization).
6. Work with the organizations to notify and educate eligible customers via email and/or mailed information.
7. Train organization staff to educate and inform members and distribute vouchers.
8. Modify Mobility Manager procedures to accommodate additional voucher traffic.
9. Collect data and feedback for evaluation at the six month and year period.

Issues to Consider

Expanding the program into Phase 2 may require additional staff time and/or hiring a part-time assistant to help process the vouchers.

Implementation Timeframe

This program can be implemented immediately or as soon as the Mobility Manager is ready. It is estimated that Phase 1 may take approximately six months to plan and launch. The program should be tested and modified for one year before implementing Phase 2. Once Phase 1 has been evaluated and tweaked during the one-year pilot period, Phase 2 can be planned and implemented, which will likely take between three and four months since the process will be familiar.

Potential Costs

Development and implementation of a Phase 1 flex voucher program would require about 15% of the Mobility Manager's time, or about \$9,000. Development of an expanded Phase 2 program could take up to 30% of the Mobility Manager's time, or \$18,000. Start-up expenses might also include replicating the TRIP model or the purchase or development of a simple software tool to track customers, trips, and reimbursements. Expenses associated with setting up a TRIP program include training (\$2,750 for two people to attend training at \$375 each, plus travel expenses of \$1,000 for each) and use of the TripTrak software (\$275 initial license plus \$660 for the first year of daily subscription fees).

The Mobility Manager could administer a flex voucher program using about 5% of a full-time position or about \$3,000/year for Phase 1 and 15-20% for Phase 2 or \$7,500-\$9,000.

Centralized Scheduling and Reservations (#4 ranking)

See One-Call/One-Click system description above.

Joint Applications for 5310 Vehicles (tied for #5 ranking)

In this strategy, two or more agencies could apply for 5310 vehicles jointly, in concert with future rounds of 5310 funding, and receive higher scores in the 5310 application process. Vehicles at organizations that end service in the early evening could be shared with organizations that run service late into the evening. And organizations that do not provide weekend service could share vehicles with other nearby organizations that do offer weekend service. A lead agency would need to be identified to store, maintain, and insure the vehicle, while the “borrowing” organization would utilize the vehicle on a predetermined schedule, paying an hourly or daily fee.

Implementation Steps

Implementation of this strategy would be the responsibility of the Mobility Manager, or perhaps UCTC, if there is interest in joint applications for the upcoming 2016-2017 call for 5310 applications from NYSDOT, expected in early spring of 2017:

1. Facilitate a meeting with interested organizations and help identify lead agencies.
2. Assist the lead agencies in developing procedures for “renting” vehicles between the two agencies including addressing cost allocation, operation and maintenance policies, and insurance and liability issues.
3. Assist the lead agencies in writing 5310 grants to obtain funding for vehicles, as needed.
4. Develop evaluation criteria and determine data needed to document costs, cost savings and other benefits to the sharing organizations, and any implementation issues that were encountered. Collect necessary data after new 5310 vehicles go into operation.
5. Complete evaluation after a year of operation of the new 5310 vehicles.

Implementation Timeframe

Assistance with joint 5310 applications should start in early 2017 in order to submit applications for the 2016-2017 round of funding. If coordination of joint applications is to be the responsibility of the Mobility Manager, the first joint applications may not be submitted until the call for the next round of funding.

Potential Costs

Vehicle sharing would involve some portion of staff time for each participating organization to coordinate with the other, but likely not a significant amount.

Vehicle sharing should also result in operational cost savings (fuel, maintenance, insurance) to the extent that the number of vehicles operated by the participating agencies is reduced.

Contracting Among Transportation Providers (tied for #5 ranking)

There are two types of contracting opportunities among Ulster County transportation providers. The first involves trips currently on providers’ schedules that they cannot provide cost-effectively and trip requests they receive that they are unable to accommodate because of capacity constraints at the time the trips are needed. The second opportunity is the use of available seats on human service providers’ vehicles to serve new public customers in areas that do not currently

receive service. Medical Motor Services' coordination project in Rochester is a model for the first type of contracting. LSCOG in Aiken, SC offers a model for the second type.

Implementation Steps

Existing trips and unserved trip requests:

1. Interested providers could identify the details of trips that they would prefer to have delivered through a contract provider that could provide the trips more cost-effectively because their set scheduled runs mean that they have vehicles in operation in the right area at the right time, headed to similar destinations.
2. Providers could share data about scheduled vehicles runs and load that data into UCAT's Novus scheduling software. Trips identified in step 1 could then be entered into the system to determine which vehicles could most efficiently provide those trips.

If the exercise shows that there are trips that could be booked on other providers' vehicles, the group should review their individual service policies—for cancellations, assistance, restrictions such as dropping individuals off at programs no earlier than program start times or not allowing individuals who require supervision to be dropped off unless someone is available at the destination, and so forth—to identify any differences that need to be resolved prior to entering into any contract arrangements.

3. Compliance on the part of contractors with requirements imposed by the contracting provider's funding sources, such as FTA third party contracting guidelines or NYS 10-A regulations, should be investigated.
4. The group should also share data about their costs and develop an equitable procedure for allocating costs of shared service and a rate for serving clients or customers of another entity.
5. Contract arrangements could be a memorandum of understanding among participating providers or a more extensive contract if needed.
6. Prior to the consolidation of UCAT and Citibus reservations and scheduling or the development of a one-call/one-click system for Ulster County, coordination of trips development of a more comprehensive centralized reservations and scheduling system, the trips provided under such arrangements would be reserved and scheduled through that system.

General public trips on human service agencies' vehicles:

1. Consult with the Arc of Ulster-Greene about the process used to develop its general public service in Greene County. Use the Arc's experience and lessons learned to revise the steps below as necessary.
2. Select an area with limited or no UCAT fixed route service, or UCAT Rural Route service only, to pilot the use of human service agency vehicles for expanded general public service. Potential pilot areas include Ellenville, the Route 28A corridor, Saugerties, Woodstock, and communities on the western side of the county. Gateway Industries and the Arc of Ulster-Greene both indicated a willingness to explore use of their unused capacity to provide trips for other organizations, including UCAT. Potential pilot areas should be compared to the service areas and scheduled vehicle runs of those

organizations to select a pilot area with the potential to be served by one of those providers.

3. Follow steps 3 and 4 above.
4. Advertise the pilot demand-response service in the selected area.
5. Follow steps 5 and 6 above.

Implementation Timeframe

Contracting among providers for the delivery of existing trips or unmet trip requests could begin immediately. Compilation of data from all interested providers in the format required by UCAT's scheduling software will likely require some time. After that, the necessary analysis could be completed relatively quickly. Developing agreements regarding service policies and reimbursement rates will also take some time. Contracting arrangements could possibly be in place within six months after the beginning of the process.

The Arc of Ulster-Greene should be consulted to establish a realistic timeline for the use of human service agency vehicles to provide general public service, but this contracting effort could take 9-12 months to implement.

Potential Costs

Costs associated with the implementation of this strategy will consist primarily of staff time, either of the providers or the providers and the Mobility Manager, if contracting opportunities are not explored until that individual is in place.

Operational costs should be equal to or less than those currently incurred by the contracting providers.

Vehicle Pool (tied for #5 ranking)

If more than two organizations are interested in sharing vehicles among each other, a vehicle sharing program could operate using a vehicle pool of donated vehicles. Organizations that "donate" vehicles into the vehicle pool would be able to use them for the daily hours that they are currently used; however, during the hours that they are unused, such as in the evenings and on weekends, any other organization (that is pre-qualified and insured) will be able to "rent" the vehicles for transporting their own clients.

Implementation Steps

1. Facilitate a meeting with interested organizations and help identify a lead agency.
2. Assist organizations in writing 5310 grant applications to obtain funding for vehicles, as needed.
3. Assist the lead agency in developing procedures for "renting" vehicles from the vehicle sharing pool including addressing cost allocation, operation and maintenance policies, and insurance and liability issues.
4. Develop evaluation criteria and determine data gathering processes for an evaluation at the one-year mark.
5. Launch program.

6. Complete evaluation analysis after one year of operating the vehicle pool.

Issues to Consider

Implementation of a vehicle sharing pool will likely require that the Mobility Manager assist the lead agency and other participants with identifying and addressing any liability issues, e.g., who insures the vehicle, what is needed to ensure that all drivers meet the insurer's standards, and so forth, that arise during the planning process.

Implementation Timeframe

Implementation of this strategy is a longer term priority and should be done after testing the vehicle sharing strategy on two organizations. Once two organizations have successfully shared vehicles, as long as there are enough organizations interested in building a vehicle sharing pool, this strategy should move forward. Implementation will likely take between three and six months depending on the availability of vehicles and the ability to surmount insurance and liability challenges.

Potential Costs

The vehicle sharing pool program administration will require approximately 10%-20% of the lead agency employee (about \$6,000-\$12,000 each year), but would also result in operational cost savings (fuel, maintenance, insurance) to the extent that the number of 5310 vehicles operated by the participating agencies is reduced.

Driver Pool (added to #5 ranking)

The TAC/SAG suggestion of a shared driver pool, similar to a vehicle pool, is an interesting one that needs exploration.

Implementation Steps

1. The first step would be to convene a meeting of agencies interested in developing and using a pool of qualified drivers.
2. Discuss staffing needs and determine the parameters of the pool:
 - Are the participating agencies interested in one central pool of drivers that would replace their own individual groups of drivers?
 - Or, are the participating agencies interested in a pool of available part-time drivers that providers could tap into to cover immediate or short-term needs?
 - Another option?
3. Whichever option is preferable, the group would need to compare information about current operations and determine how to handle the following for drivers in the pool:
 - Hiring
 - Training
 - Wages and benefits
 - Uniforms
 - Service and operating policies

- Seniority, wage rate increases, discipline, and other human resources policies

Implementation Timeframe

This strategy is likely to take some time to investigate and develop more fully. Interested agencies could begin discussions at any time.

Potential Costs

Establishment of a driver pool would require staff time from participating agencies during the planning stage. If implemented, participating providers would presumably reimburse any lead agency or agencies for services provided on behalf of the group (such as hiring or training), but spend less on hiring, training, and other related functions than they do today.

Expand Travel Training Program (#6 ranking)

Combination of the OFA and UCAT travel training programs could be undertaken by either the Mobility Manager or the two organizations on their own, prior to the establishment of a Mobility Manager position.

Implementation Steps

1. Compare policies procedures between the two programs: marketing/recruitment, intake, assessment, selection of appropriate travel training approach, training for trainers, training methods, recordkeeping, and follow-up. Share information about costs and resources for trainers, marketing, and administration. Resolve any differences and develop new policies and procedures that match available resources.

Training methods typically include one-on-one training over a period of weeks for people with developmental disabilities, providing training for a specific trip or more generalized training on use of fixed route services; group training with older adults, either taking the group into actual transit service or taking a bus to a senior center or other location for training outside of revenue service; “bus buddy” programs that assign a trained volunteer to work with a trainee until he/she feels comfortable using the fixed route system independently; and training for potential paratransit users who may require an assistant or aide to enable them to use the service independently and safely.

2. Assign responsibility for various functions.
3. Consolidate and revise training for trainers, as needed. Make sure that existing trainers are briefed on new policies and procedures.
4. Determine the number of individuals who could be trained with available resources.
5. Selectively market the expanded program to organizations that provide services and programs for potential trainees, and the public.
6. Track number of requests for training, number of individuals trained and training method, trainer, and training dates.

Implementation Timeframe

If OFA and UCAT are interested in merging their two travel training programs in the short term, and marketing them to other potential trainees (such as individuals with developmental

disabilities or clients of health/mental health care providers), they could start the consolidation process at any convenient time. If the Mobility Manager will be responsible for merging and expanding the programs, implementation would start after that individual is in place.

Potential Costs

Costs to combine the two programs would likely be minimal, and consist primarily of staff time to identify overlapping functions (recruitment, assessment of initial skill level and most appropriate training method, training time, recordkeeping), determine the best approach to consolidation, and market the new combined program. Should the number of trainees increase significantly, a part-time or full-time trainer may become necessary in the future.

Vanpool or Ridematching Service (# 7 ranking)

Mobility Managers in other NY counties, including Allegany, Schuyler, Chemung, and Steuben, coordinate with the 511NY Rideshare Program (<http://511nyrideshare.org/>) to connect residents with opportunities to carpool or vanpool. Since these modes will likely be used primarily for work trips, outreach should be made to the employers in Ulster County that are not located close to fixed bus routes, which are listed in Chapter 2, to identify any that have trouble attracting or retaining employees due to transportation issues. Those employers would be good potential partners for subsidizing or making services available to employees through pre-tax payroll deductions (in exchange for employer payroll tax savings), publicizing and promoting the availability of ridematching and vanpool services.

Developing and implementing this strategy should be the responsibility of the Mobility Manager.

SUMMARY OF POTENTIAL COSTS AND FUNDING SOURCES

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Figure 5 summarizes estimated potential costs for each recommended mobility management strategy and identifies potential funding sources. All strategies would be eligible uses for 5310 funds, either from the mobility management category in the 55% portion of the region's apportionment that must be spent on "traditional" 5310 capital projects, if carried out by nonprofit organizations, or the 45% portion if carried out by public entities. The costs associated with contracting for service would also come from the 55% portion. The costs associated with a flex voucher program would be eligible expenses in the 45% portion of the region's apportionment, which may be used for "other eligible capital and operating expenses."

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Figure 5 Summary of Estimated Costs and Potential Funding Sources

Strategy	Potential Costs	Possible Funding Sources
Mobility Manager	\$50,000-60,000/year	5310 Mobility Management-55% portion-80% federal; 5307—80% federal
One-Call/One-Click system	\$50,000 for consultant study	5310 Mobility Management-55% portion-80% federal; 5307—80% federal
Flex voucher program	\$9,000 staff time for Phase 1 start-up \$18,000 for Phase 2 start up TRIP replication expenses \$3,685 \$3,000-6,000 for ongoing administration, Phase 1 \$9,000-12,000 ongoing administration, Phase 2	5310 45% portion, 50% federal Human service agency sponsorships Private foundations
Centralized reservations and scheduling	Part of one-call/one-click system	5310 Mobility Management for planning, acquisition of equipment, 55% portion-80% federal
Joint 5310 Vehicle Applications	Minimal additional staff time	5310 Mobility Management, 55% portion-80% federal
Vehicle sharing pool	\$6,000-\$12,000 per year lead agency	5310 Mobility Management, 55% portion-80% federal
Driver pool	Staff time during the planning stage Cost-neutral after implementation	5310 Mobility Management, 55% portion-80% federal
Contracting for service among providers	Cost-neutral after implementation Staff time for planning	5310 Mobility Management, 55% portion-80% federal for planning Normal operating assistance sources for ongoing operations
Expand travel training program	Staff time for planning or part of Mobility Manager's duties	5310 45%, 50% federal
Ridematching service/vanpool	No cost to users for 511NY Rideshare matching service Vanpool costs borne by participants (employer may provide vehicle) Minimal marketing costs	NA

IMPLEMENTATION TIMELINE

Figure 6 presents a suggested timeline for the mobility management strategies outlined above. Apart from the hiring of a Mobility Manager and the establishment of a county coordination council or mobility management advisory group, the final set of mobility management strategies to be pursued and the order in which that occurs should be determined with the input of that advisory group and reflect its goals and priorities.

The timeline below follows a logical sequence for the implementation of strategies and emphasizes developing new programs to expand existing services and fill gaps before developing a complex one-call/one-click system.

Figure 6 Preliminary Timeline for Implementation of Mobility Management Strategies

Implementation Timeline
First Quarter 2017
Form Ulster County Coordination Council/Ulster County Mobility Management Advisory Committee
Select desired program of Mobility Management strategies and prepare to apply for 5310 funding for activities planned for 2017
Begin process of hiring Mobility Manager
Convene meeting of providers to discuss contracting opportunities, if interested
Assist providers with preparation of joint applications for 5310 vehicles
Second Quarter 2017
Continue first quarter activities
Coordinate planning for centralized reservations and scheduling among providers with consolidated UCAT/Citibus system, if appropriate
Continued meetings of Ulster County Coordination Council
Third Quarter 2017
Mobility Manager in place
Consolidate and expand travel training programs
Begin development of flexible transportation voucher program
Provide staff support for Ulster County Coordination Council
Fourth Quarter of 2017
Continue planning for centralized reservations and scheduling
Continue third quarter activities
Provide staff support for Ulster County Coordination Council
First Quarter of 2018
Begin planning RFP for consultant one-call/one-click study
Begin development of vehicle pool and/or driver pool
Continue fourth quarter activities