



**FINAL**  
**Toledo Metropolitan Area Council of  
Governments/  
Toledo Area Regional Transit Authority  
Coordinated Public Transit  
- Human Services Transportation Plan  
For Toledo Metropolitan Area**

Strategies and Solutions  
For Improving the Delivery of Transportation Services  
For Older Adults, Persons with Disabilities  
And Low Income Families

*Prepared for the*  
**Toledo Area Regional Transit Authority  
Toledo Metropolitan Area Council of Governments**

*Prepared by*



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**April 2008**

## **TABLE OF CONTENTS**

<b>I. Introduction</b>	<b>1</b>
<b>II. Community Outreach Activities</b>	<b>4</b>
<b>III. Serving Customers with Mobility Needs</b>	<b>6</b>
<b>IV. Unmet Needs and Gaps and Overlaps in Transportation Services</b>	<b>13</b>
<b>V. Coordinating Transportation Services</b>	<b>31</b>
<b>VI. Moving Toward the Coordination of Transportation Services</b>	<b>36</b>
<b>VII. Strategies and Solutions for Coordinating Transportation Services</b>	<b>41</b>
<b>VIII. Transportation Coordination Plan</b>	<b>62</b>
<b>IX. Program Priorities</b>	<b>73</b>
<b>Appendices</b>	<b>81</b>

# LIST OF TABLES AND FIGURES

## Tables

Table 1 – Target Populations – Selected Demographic Characteristics	7
Table 2 – Population Projections	8
Table 3 – Public Transportation Characteristics	14
Table 4 – Summary of Human Service Transportation	18

## Figures

Figure 1 – Distribution of Persons Age 65 or more Years of Age	10
Figure 2 – Distribution of Persons with a Physical or Sensory Disability	11
Figure 3 – Distribution of Households by Median Income	12
Figure 4 – Public Transportation Services in the Toledo Region	15
Figure 5 – TARTA Fixed-Route and Complementary Paratransit Services	16
Figure 6 – Transit-Supportive Population and Employment Areas Unserved by TARTA	24
Figure 7 – Top Desired Destinations Unserved or Underserved by Transit	25
Figure 8 – Areas within and beyond TARTA’s Fixed Route Service Area Supportive of Transit Service Healthcare Facilities	26
Figure 9 – Number of TARTA Bus Routes in Service	27
Figure 10 - Overlap in TARTA Paratransit Service and Senior Transportation Services	30
Figure 11 - A Family of Transportation Services Concept	33
Figure 12 - The Key to Transportation Coordination	34
Figure 13 - A Mobility Management Concept	37
Figure 14 - Mobility Management Triangles	40
Figure 15 – Results of Workshop Priority Rating and Votes	43
Figure 16 - Unmet Needs; Gaps in Service; Overlaps in Transportation Services; and Strategies and Solutions	78
Figure 17 – Implementation Timeline	80

# I INTRODUCTION

## **The Coordinated Transportation Plan Requirement**

With the passage of federal transportation authorizing legislation (SAFETEA-LU) in August 2005, three new or modified funding programs administered by the Federal Transit Administration require a Coordinated Public Transit-Human Services Transportation Plan and the competitive selection of projects for funding. The focus of the planning is on the transportation mobility of the following target groups: 1) older persons, 2) persons with disabilities and 3) persons from low income families. The plan should recommend strategies that improve travel mobility by making better use of federal programs across departments and agencies to meet the needs of the target populations.

For the Toledo OH – MI Urbanized Area, this plan was developed collaboratively by the Toledo Area Regional Transit Authority (TARTA) and the Toledo Metropolitan Area council of Governments (TMACOG).

## **New or Modified FTA Programs Included for the Planning**

- [FTA Section 5310 Elderly Individuals and Individuals with Disabilities Program](#) – This existing program, administered by ODOT, is an existing formula program that provides for public transportation capital projects planned, designed for and carried out to meet the special needs of elderly Individuals and Individuals with disabilities..
- [FTA Section 5316 Job Access and Reverse Commute Program](#) – This modified program focuses on improving access to transportation services to employment and employment-related activities for welfare recipients and eligible low-income individuals. This program provides financial assistance for transportation services planned, designed and carried out to meet their transportation needs.
- [FTA Section 5317 New Freedom Program](#) – This program aims to provide additional tools to overcome existing barriers facing Americans with disabilities seeking integration into the work force and full participation in society. The program seeks to expand the transportation mobility options available to persons with disabilities beyond the requirements of the Americans with Disabilities Act of 1990.

To be eligible for funding, projects must be consistent with a locally-developed Coordinated Public Transit-Human Services Transportation Plan.

## Coordinated Public Transit-Human Services Transportation Plan

To establish eligibility for funding through these three programs for Federal Fiscal Year 2007 (October 2006 through September 2007) and beyond, metropolitan areas are required to prepare a Coordinated Public Transit-Human Services Transportation Plan. Projects to be funded through these three programs must be derived from this locally developed plan. The plan must be developed through a planning process that includes representatives of public, private and non-profit transportation and human service providers and private transportation providers. Public outreach will target especially older persons, persons with disabilities and people with low incomes.

The planning includes significant community outreach to the three target populations, human service agencies and advocates serving the target populations and providers of transportation and human services funded by other federal programs.

The coordination plan must address the following required elements:

- An assessment of available services that identifies current public, private and non-profit providers
- An assessment of transportation needs of older persons, persons with disabilities and people with low incomes
- Strategies and activities to address the gaps in services identified and achieve efficiencies in service delivery
- Relative priorities for implementation based on resources, time and feasibility for implementing the specific strategies and activities identified in development of the plan

Completion of this plan enables TARTA, TMACOG and other stakeholders to work together to address and achieve several outcomes:

- Effective coordination of TARTA's public transportation services with transportation services provided by human service agencies and private transportation companies.
- Use of Section 5316 – Job Access and Reverse Commute Program to help implement coordinated transportation services and projects to improve transportation services for low income people, including those enrolled in Ohio Works first programs
- Use of Section 5317 – New Freedom Program to help implement coordinated transportation services and projects to improve transportation services for people with disabilities
- Use of Section 5310 – Elderly Individuals and Individuals with Disabilities Program to help provide capital equipment to meet unmet needs and fill gaps in services

Community outreach, collaboration and consensus building is important in ensuring that a coordination plan is responsive to needs and consistent with the resources that are available.

The purpose of this plan report is to present the plan for coordinating public transit and human services transportation services. The plan addresses strategies and makes recommendations for action by which transportation services may be coordinated among TARTA and human services agencies in the Toledo region.

The report is organized as follows:

- I. Introduction
- II. Serving Customers with Mobility Needs
- III. Unmet Needs, and Gaps and Overlaps in Transportation Services
- IV. Community Outreach
- V. Coordinating Transportation Services
- VI. Moving Toward the Coordination of Transportation Services
- VII. Strategies and Solutions for Coordinating Transportation Services
- VIII. Transportation Coordination Plan and Conclusions

## II COMMUNITY OUTREACH

Community outreach activities have been central to looking at how well the broad range of transportation services in the Toledo region are meeting the mobility needs of residents, particularly older persons, persons with disabilities and persons with low income. These three groups are, in fact, among the people who have the greatest difficulty meeting their needs to travel with a personal motor vehicle.

Community outreach activities have been conducted in two phases:

- Outreach during completion of TMACOG's Regional Transit Study, completed in 2003
- Outreach completed during the preparation of this plan

Outreach during completion of the Regional Transit study included:

- A community survey of residents
- Focus groups with target population groups
- Public meetings
- Stakeholder interviews
- Outreach resulting in phone, mail, fax and email input

This outreach is well-documented in the study.

Outreach completed during preparation of the transportation coordination plan built on the Regional Study outreach, focusing more closely on the coordination of transportation services and included:

- Meetings of key stakeholders hosted by TMACOG's Human Service Transportation Committee and the Toledo Mobility Alliance.
- A workshop to identify and prioritize alternative strategies for coordinating transportation services

### **HUMAN SERVICES TRANSPORTATION COMMITTEE**

During development of the transportation coordination plan, TMACOG's Human Services Transportation Committee met to

- Identify unmet needs and gaps in transportation services
- Develop an understanding of the transportation coordination planning

- Establish priorities for the 5316 – Job Access and Reverse Commute and 5317 – New Freedom Programs

## **MOBILITY ALLIANCE OF GREATER TOLEDO**

During development of the transportation coordination plan, the Mobility Alliance of Greater Toledo hosted a meeting to

- Identify unmet needs
- Identify gaps in transportation services
- Develop an understanding of the transportation coordination planning

## **COMMUNITY OUTREACH WORKSHOP**

One half-day workshop was held to bring stakeholders together to review finding regarding target populations, unmet needs and gaps in transportation services and to discuss issues, express desires for change, evaluate alternative strategies for coordinating transportation services and reaching consensus.



# III

## SERVING CUSTOMERS WITH MOBILITY NEEDS

### THE TARGET POPULATIONS OLDER PERSONS, PERSONS WITH DISABILITIES AND PERSONS WITH LOW INCOMES

Transportation services are typically provided in communities and regions to help people who do not have sufficient access to their own private transportation that meets their mobility needs; in other words to reach the places they need for work, school, shopping, personal business and other requirements. People who lack sufficient mobility include the target populations in this coordinated planning, specifically older persons, persons with disabilities and persons with low income. These are the segments of the population typically unable to fully meet the need for mobility with their own personal transportation. Communities develop transportation services to help them more fully meet their mobility needs to get to and from the places they need to reach.

### THE SIZE OF THE TARGET POPULATIONS

In 2006, the Toledo region (Lucas, Wood and Ottawa Counties, had a total population of approximately 610,000.

#### Older Persons

Looking first at older persons in Lucas County region, there are 56,371 persons aged 65 or more years of age

Important indicators of mobility need among older persons are the following characteristics:

- Persons with a disability
- Persons with low income (defined as 150% of the poverty level)
- Persons without access to a motor vehicle

It is well documented that as persons get older, the incidence of disability and low income increase, with negative impacts on older persons ability to move around and live

independently. Table 2 shows that of the persons 65 or more years of age, 39% in Toledo, 32% in the rest of Lucas County and 42% in Wood County have a disability.

### Persons with a Disability

Among the population 5 or more years of age, there are 71,971 persons with a disability. That represents 17.7% of the population, or about one person in six.

### Low Income Persons

Looking at people living in households with income below 150% of the poverty level in Lucas County, these households account for nearly 18% of the population. Additionally, 10% of the population is living in households without access to a motor vehicle to meet their mobility needs.

**Table 1**

<b>TARGET POPULATIONS</b>					
<b>Older Persons, Persons with Disabilities, Individuals with Income below Poverty Level</b>					
<b>2006</b>					
	<b>Lucas County</b>				
	<b>City of Toledo</b>	<b>Outside Toledo</b>	<b>Lucas County</b>	<b>Wood County</b>	<b>Ottawa County</b>
<b>Target Populations</b>	<b>2006</b>	<b>2006</b>	<b>2006</b>	<b>2006</b>	<b>2000</b>
<b>Total Population</b>	298,446	146,835	445,281	124,183	40,985
<b>Persons 65 or more years of age</b>	35,874	20,497	56,371	14,145	6,710
% of Total Population	12.3%	14.0%	12.7%	11.4%	16.4%
<b>Non-Institutionalized Persons 65+</b>	34,073	19,072	53,145	13,465	
<b>With a Disability</b>	14,698	6,155	20,853	5,702	
% with a disability	43.1%	32.3%	39.2%	42.3%	
<b>Persons 5 or more years of age with a disability</b>	53,795	18,156	71,951	14,449	7,231
% of Total Persons 5 or more years of age	20.3%	12.8%	17.7%	12.4%	18.9%
<b>Individuals with income below the poverty level</b>	X	na	X	X	2,374
% of Individuals for whom Poverty Status is Known	22.7%	na	16.8%	11.3%	5.9%
<b>Households with no vehicles available</b>	15,547	2,736	18,283	2,223	678
% of Total Households	12.9%	4.6%	10.2%	4.5%	4.1%

Source: US Census Bureau, American Community Survey, 2006.

## PROJECTED GROWTH IN THE OLDER ADULT POPULATION

One of the critical mobility issues facing the country is the projected growth of the older adult population in the next 20 to 30 years. Table 2 presents projects of the senior population prepared by the Ohio Department of Development and the Scripps Gerontology Center, Miami University in Ohio.

**Table 2**

<b>POPULATION PROJECTIONS</b>			
<b>Total Population and Persons 60 or more Years of Age</b>			
<b>2000 to 2020</b>			
<b>Populations</b>	<b>Lucas County</b>	<b>Wood County</b>	<b>Ottawa County</b>
<b><u>Total Population</u></b>			
2000	455,050	121,070	40,990
2020	434,650	133,330	40,270
<b>% Change</b>	<b>-4.5%</b>	<b>10.1%</b>	<b>-1.8%</b>
<b><u>Persons 60 or more years of age</u></b>			
2000	76,190	17,460	8,850
2020	99,620	28,080	12,240
<b>% Change</b>	<b>30.8%</b>	<b>60.8%</b>	<b>38.3%</b>
Source: Ohio Department of Development, Office of Strategic Research, July 2003			
<b><u>Persons 60 or more years of age</u></b>			
2000	76,190	17,460	8,850
2020	96,761	28,460	13,275
<b>% Change</b>	<b>27.0%</b>	<b>63.0%</b>	<b>50.0%</b>
Source: Miami University, Scripps Gerontology Center			

In Lucas County, the population of persons 60 or more years of age is project to grow by 27% to 31%, compared with a projected loss in total population of 4.5%. In Wood County, the population of persons 60 or more years of age is projected to grow by 61% to 63%, compared to a projected growth of 10% in total population. In Ottawa County, the population of persons 60 or more years of age is projected to grow by 38% to 50%, compared to a projected loss of 1.8% in total population.

Consequently, by virtue of population growth trends alone among older persons, mobility needs will grow as the population ages and the incidence of disability increases.

## **GEOGRAPHIC DISTRIBUTION OF THE TARGET POPULATIONS**

Just as the socio-demographic circumstances of older persons, persons with disabilities and persons in low-income families has an impact on mobility needs within communities, so also does where these people live. The geographic distribution of target populations is presented in figures 1 through 3. Typically, older persons are geographically distributed much like the general population. This is somewhat less so for people with disabilities and considerably less so for people with low incomes.

Looking first at persons 65 or more years of age, the concentration appears to be relatively greater in some areas of the City of Toledo and selected communities outside the city. The map shows TARTA bus routes as well and highlights areas where older persons are without access to TARTA fixed-route and TARPS services.

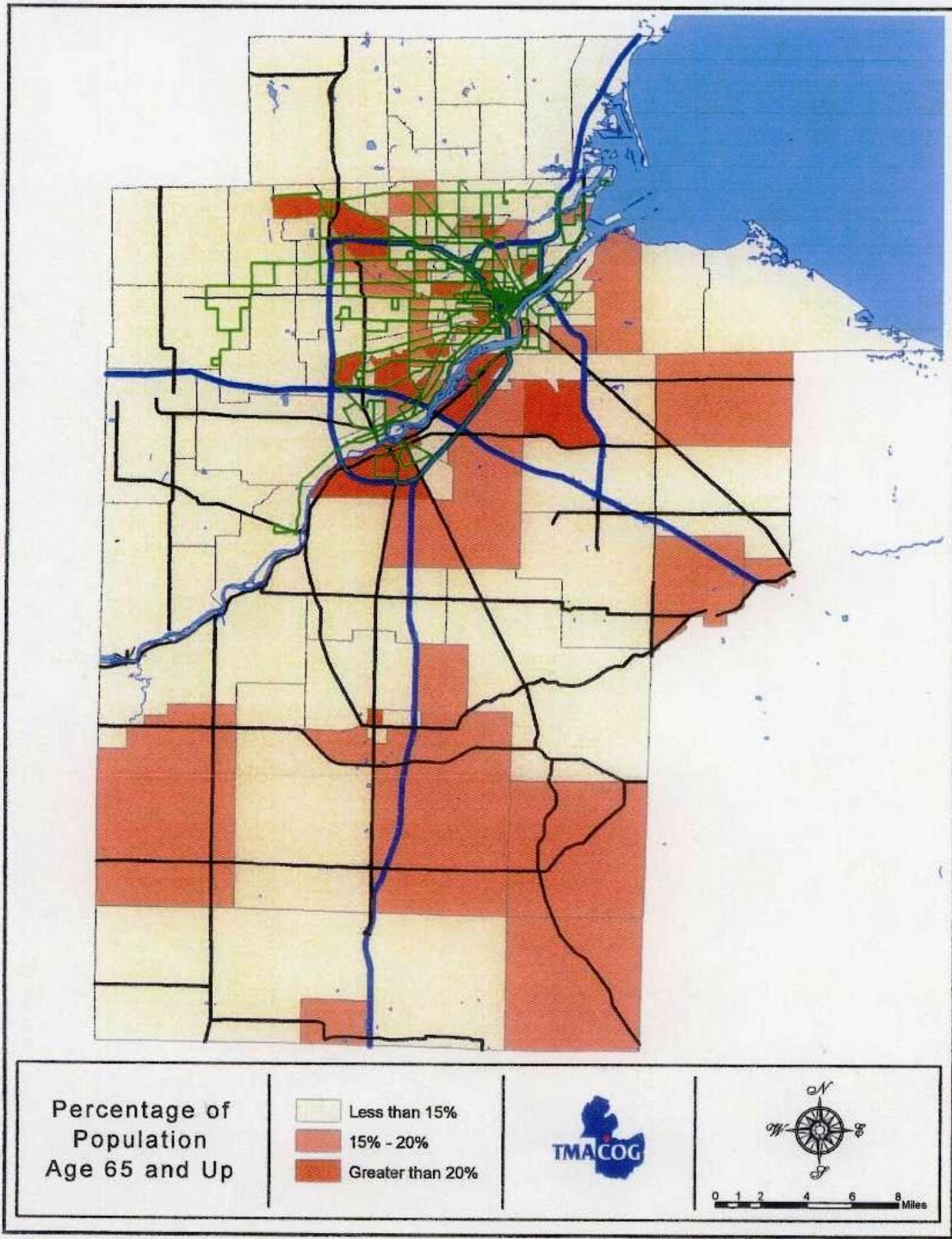
Looking next at persons 5 or more years of age with a disability, the concentrations are high across the region. Again, there are significant areas where persons with disabilities do not have access to TARTA's fixed route and TARPS services.

Finally, looking at the median income levels of households; persons in low income households are concentrated at higher levels within the city of Toledo. Again, there are areas well beyond the coverage of TARTA's services.

**Figure 1**  
**Geographic Distribution of Persons Aged 65 or more Years of Age**

TMACOG Regional Transit Study  
Final Report

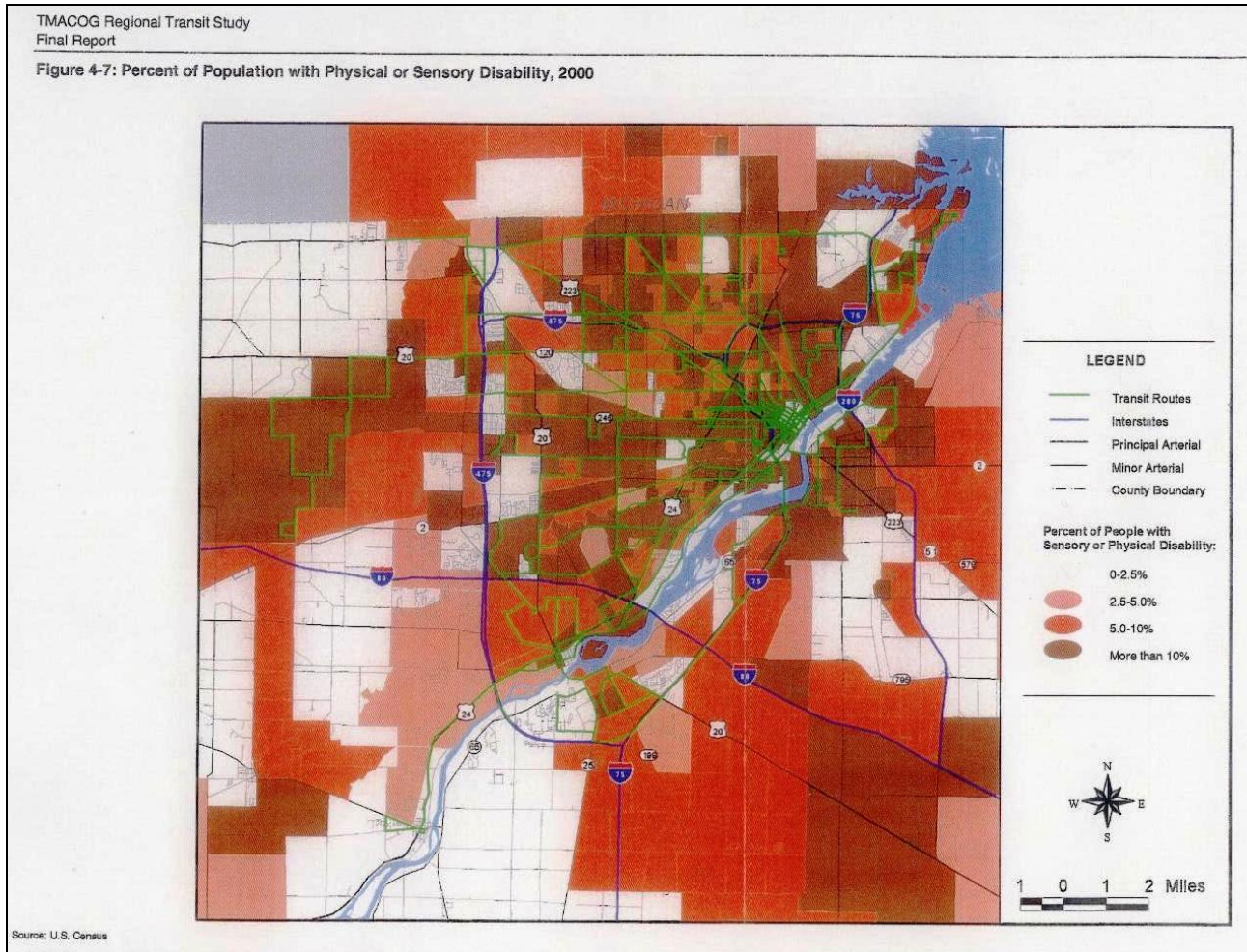
**Figure 4-10: Percentage of Population Aged 65 and Over, 2000**



Source: US Census Bureau, Census of Population and Housing, 2000.

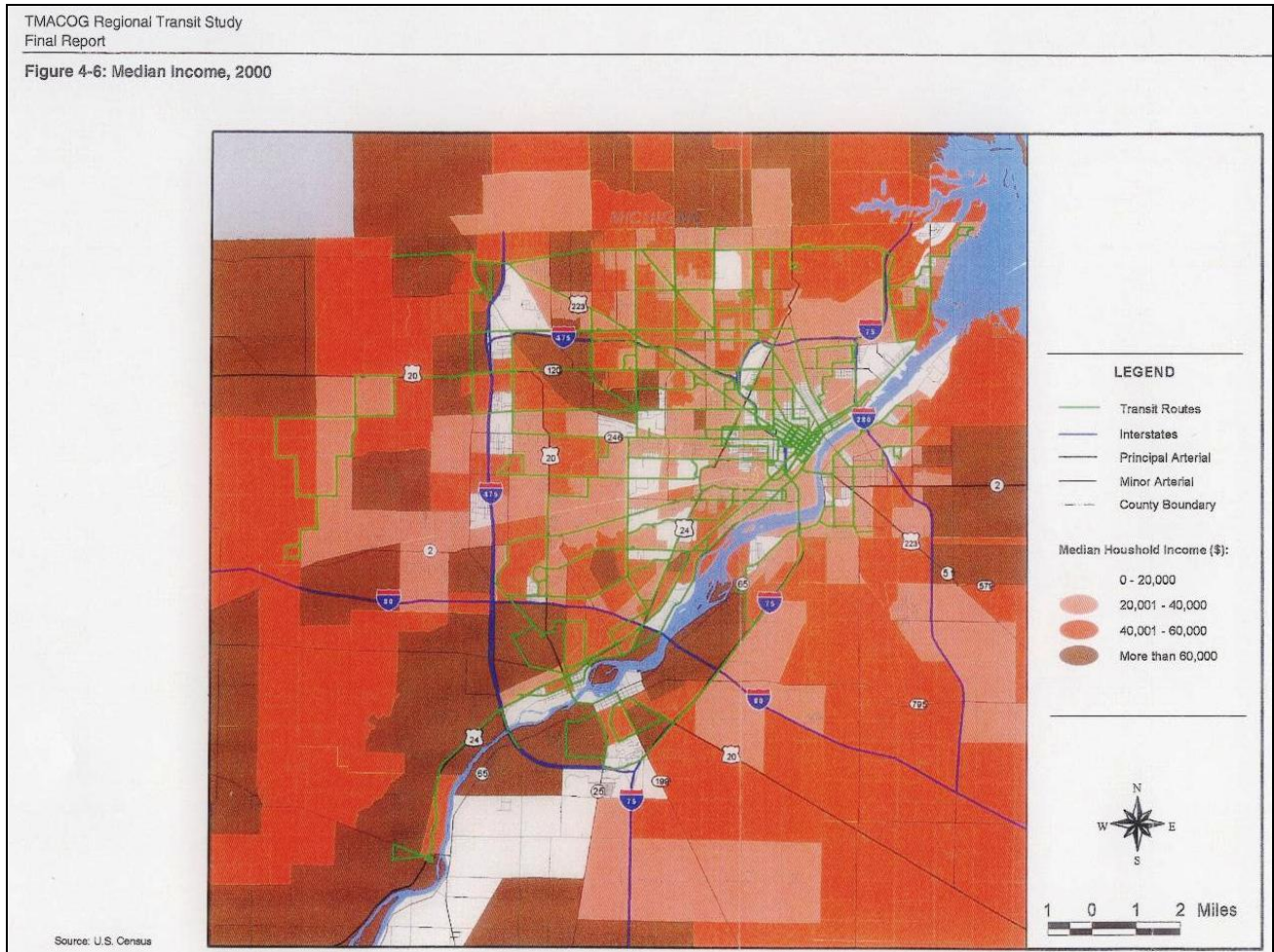


**Figure 2**  
**Geographic Distribution of Persons with a Physical or Sensory Disability**



Source: US Census Bureau, Census of Population and Housing, 2000.

**Figure 3**  
**Geographic Distribution of Households by Median Income**



Source: US Census Bureau, Census of Population and Housing, 2000.

# IV

## TRANSPORTATION SERVICES, UNMET NEEDS, AND GAPS AND OVERLAPS IN SERVICES

### TRANSPORTATION SERVICES IN THE TOLEDO REGION

While the general population meets its mobility needs with personal motor vehicles, older persons, persons with disabilities and persons in low-income households have a more difficult time meeting their needs with personal means of transportation. Hence, historically, communities have developed transportation services that are available to these people. These services include:

- Public transportation services
- Transportation services provided by not for profit human service agencies
- Private transportation services, such as taxi services.

To develop an understanding of the transportation services available to our target populations, the information gathered through the transportation survey, directly from transportation providers and other sources have been reviewed and analyzed.

### Public Transportation Services

Public transportation services are provided in Lucas County and limited areas of Wood County by the Toledo Area Regional Transit Authority. Public transportation services are provided in Wood County by Bowling Green Transit.

TARTA serves the communities of Toledo, Maumee, Oregon, Ottawa Hill, Sylvania, Sylvania Township and Spencer Township in Lucas County and the communities of Perrysburg and Rossford in Wood County.

TARTA provides fixed route and complementary paratransit service meeting the requirements of the Americans with Disabilities Act Selected characteristics of their services are provided in Table 3. TARTA, in 2006 served 4.4 million passengers on its fixed route and demand response services, operating nearly 5 million miles and 326,000 miles of service on operating expenses of \$31 million. TARTA has a fleet of 221 vehicles, 218 of which are fully accessible for people with disabilities. TARTA operates



its services on weekdays, Saturday and Sunday from 4:30AM to Midnight.

**Table 3**

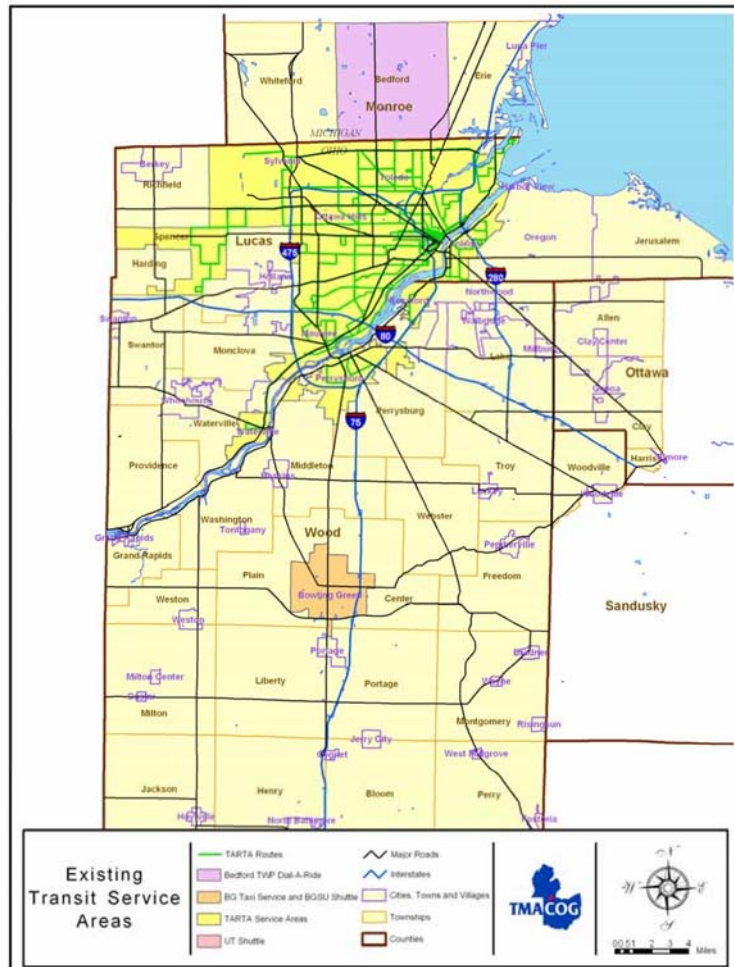
<b>PUBLIC TRANSPORTATION SYSTEM CHARACTERISTICS</b>				
<b>In the Toledo Region</b>				
<b>2006</b>				
	<u>Fixed Route</u>	<u>Demand Response</u>	<u>Total</u>	
<b><u>Toledo Area Regional Transit Authority</u></b>				
Passenger Trips	4,323,340	105,175	4,428,515	
Vehicle Miles	3,802,602	1,151,411	4,954,013	
Vehicle Hours	243,547	82,211	325,758	
Operating Cost	\$27,680,675	\$3,392,105	\$31,072,780	
Local Public Funding	\$14,927,641	-	\$14,927,641	
Number of Vehicles				
			Total	
			221	
			Accessible	
			218	
Span of Service				
	Weekdays	4:30AM to Midnight		
	Saturday	4:30AM to Midnight		
	Sunday	4:30AM to Midnight		
<b><u>Bowling Green Transit</u></b>				
Passenger Trips	-	43,065	43,065	
Vehicle Miles	-	147,971	147,971	
Vehicle Hours	-	7,407	7,407	
Operating Cost	-	\$491,194	\$491,194	
Local Public Funding	-	\$71,522	\$71,522	
Number of Vehicles				
			Total	
			7	
			Accessible	
			7	
Span of Service				
	Weekdays	6:00AM to 8:00PM		
	Saturday	10:00AM to 4:00PM		
	Sunday	No Service		
Source: Status of Transit in Ohio , 2006.				

Bowling Green Transit services are wholly within the community of Bowling Green. BGT provides demand response service only. In 2006, BGT served 43,065 passengers operating nearly 148,000 miles and 7,400 miles of service on operating expenses of \$491,000. BGT has a fleet of 7 vehicles, all of which are fully accessible for people with disabilities. BGT operates its services on weekdays from 6:00AM to 8:00PM and from 10:00Am to 4:00PM on Saturdays. No service is provided on Sundays.

Bowling Green Transit receives federal funding from the Federal Transit Administration's 5311 Rural Transit Program through the Ohio Department of Transportation. Consistent with ODOT's requirements, BGT is preparing a separate coordinated public transit – human services transportation plan.

The coverage of public transportation services is shown in figure 4.

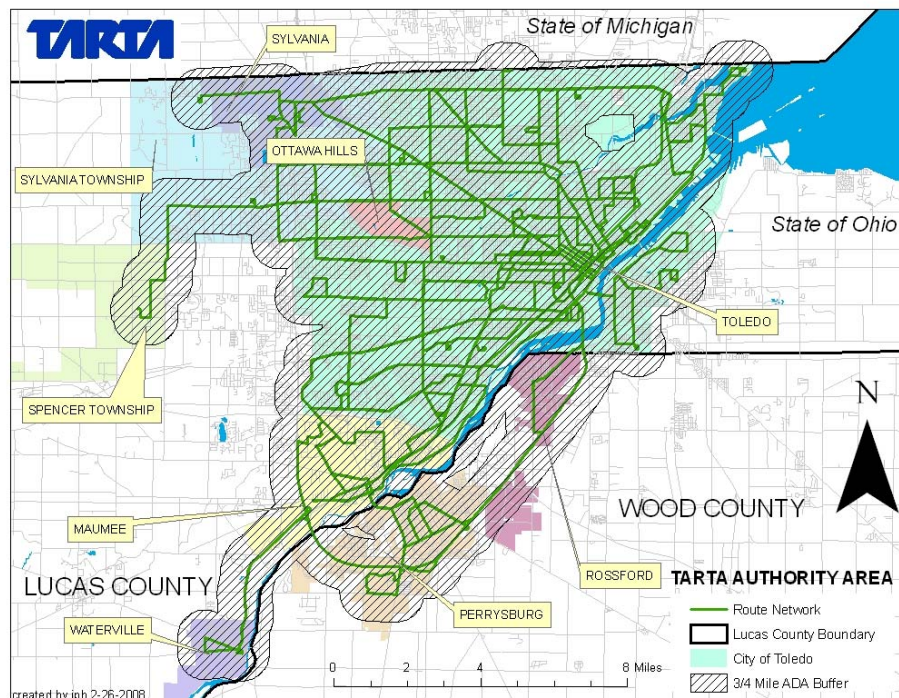
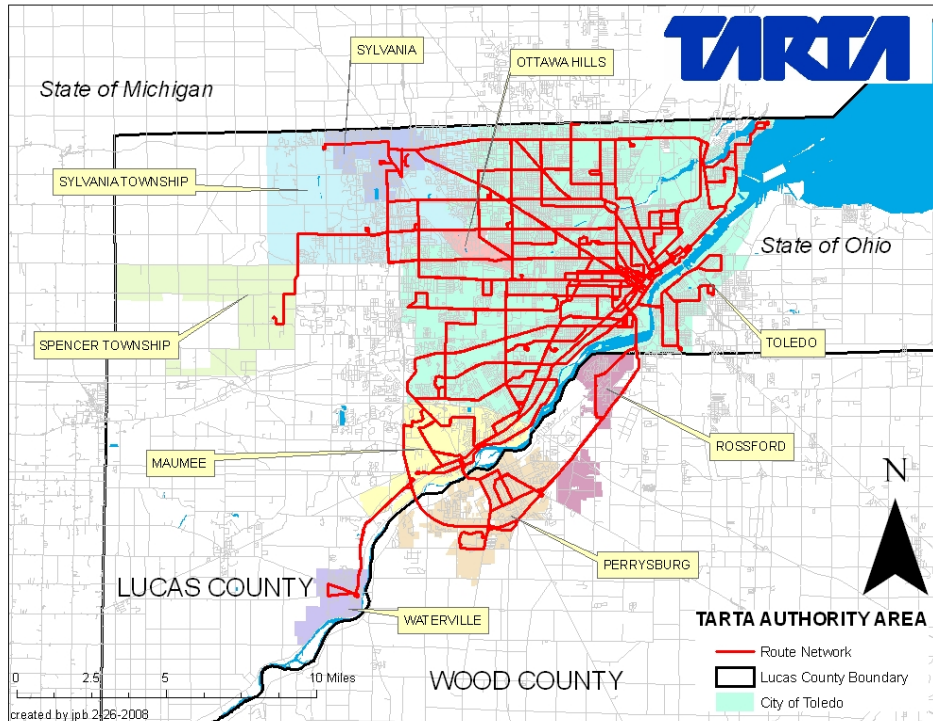
**Figure 4**  
**Public Transportation Services in the Toledo Region**



Source: TMACOG, Regional Transit Study, 2004

Figure 5 shows TARTA's fixed routes in more detail. The service area of TARTA's complementary paratransit service, TARPS, is also shown.

**Figure 5**  
**TARTA Fixed Route and Complementary Paratransit Services**



## Human Service Agency Transportation Services

Historically, human service agencies have been responsive to their clients' need for transportation to reach agency services. A number of agencies have a long history of providing transportation services for them. Many of these services are supported with federal programs designed to offer social services to specific groups of people, such as the target populations of older persons, persons with disabilities and persons in households with low income.

Human service agency transportation services in the Toledo region have been documented to the extent practical for this planning through a survey of human service agencies conducted by the Toledo Metropolitan Area Council of Governments, supplemented with information provided by the Area Office on Aging of NOW, Inc.

Transportation services provided by seventeen human service agencies are reported in Table 4. Nearly all of them provide direct transportation service. Major agencies reporting include the Wood County Board of Mental Retardation and Developmental Disabilities and the Area Office on Aging of NOW, Inc. It is estimated that, in total, these agencies provide over 262,000 rides with operating expenses of nearly \$3,000,000. These agencies have over 150 vehicles, approximately half of which are accessible. Among other agencies with a major investment in transportation services are the Lucas County Department of Jobs and Family Services and the Lucas County Board of Mental Retardation and Developmental Disabilities.

These agencies report that they provide transportation for the following purposes:

- Agency social services
- Medical services
- Work
- Education and training
- Life needs such as food and other essentials
- Socialization activities

Agencies purchase transportation services from private companies. Among the private transportation companies used are Diversified Transportation and Black and White Cab.

Human service agencies provide transportation services, principally to provide services to people who are eligible for their services. For the most part, transportation services operate when agencies are open, typically on weekdays between the hours of 8:00AM and 5:00PM. Few social services are available on weekends; as a consequence agencies do not operate their transportation services.

Table 4

**SUMMARY OF HUMAN SERVICES TRANSPORTATION**

	Days and Hours of Service			Operating Expenses	Annual Riders	Miles Operated	Number of Vehicles	
	Weekday	Saturday	Sunday				Total	Accessible
<a href="#">Human Service Agencies</a>								
Community Development Centers	Days and Hours of Agency Services			\$60,000	850	na	1	1
Bitter Sweet Farms	Days and Hours of Agency Services			na	6,000	na	6	0
TLC Health Care Services	Days and Hours of Agency Services			na	100,000	na	30	20
JFS Senior Adult Center	Days and Hours of Agency Services			\$90,000	3,750	na	3	1
Brookside Ambulette	Days and Hours of Agency Services			\$1,000,000	40,000	na	20	na
Wood County MRDD	Days and Hours of Agency Services			\$1,400,000	15,250	na	67	30
Lucas County MRDD	Days and Hours of Agency Services			na	na	na	na	na
Anne Grady	Days and Hours of Agency Services			na	24,000	na	10	10
AIDS Resource Center Ohio	Days and Hours of Agency Services			na	117	na	0	0
Adelante, Inc.	Days and Hours of Agency Services			\$40,000	10,800	na	4	0
Aurora Project, Inc.	Days and Hours of Agency Services			\$6,200	125	na	1	0
Bethany House	Days and Hours of Agency Services			na	416	na	0	0
Catholic Charities	Days and Hours of Agency Services			\$2,500	50	na	2	0
Family Promise of Greater Toledo	Days and Hours of Agency Services			\$8,000	12,500	na	0	0
Goodwill Industries of Northwest Ohio	Days and Hours of Agency Services			na	500	na	0	0
Harbor House	Purchase of TARTA Bus Passes			\$19,200	41,600	na	0	0
Maumee Senior Center	Days and Hours of Agency Services			\$15,000	2,600	na	1	0

Sources: Human Service Agencies; Toledo Metropolitan Area Council of Governments, Transportation Survey, 2008



## **[Commuter Services Programs \(TMACOG\)](#)**

The Toledo Metropolitan Area council of Governments provides several transportation services to commuters in the region, including a focus on low income persons who lack personal mobility and need alternatives to reach jobs, especially in suburban areas either not well served or unserved by TARTA. Provided by the TMACOG Commuter Services Department, these programs provide commuters with a variety of solutions to meet their transportation needs.

### **[Share A Ride](#)**

The Share A Ride program is a free, computerized carpool matching service that serves residents of Fulton, Lucas, Ottawa, Sandusky, Seneca, and Wood counties. Share A Ride helps interested commuters locate others that live and work near them to form carpools.

### **[Specialized Transportation \(5310\)](#)**

Each year, the Ohio Dept. of Transportation Federal Transit Administration makes available Specialized Transportation (5310) funds for the purchase of vehicles to transport elderly and disabled individuals. Any private, non-profit organization providing transportation to elderly or disabled community may apply.

### **[Northwest Ohio CommuterLINK](#)**

The Northwest Ohio CommuterLINK program provides 90-day work and training transportation services to low-income individuals. This program serves Ohio Works First clients who are receiving cash benefits. To qualify, an individual must work at least 30 hours per week and working/living in a location that is not served by TARTA.

### **[Car Buy](#)**

The Car Buy Program helps low-income, working families obtain mechanically sound, used vehicles. Applicants must be a parent of a minor child, at least 21 years old, work at least 30 hours per week for a period of six months prior to applying, and have a good driving record. Approved applicants pay \$150 per month, which includes insurance, for a 12-month period. The participant receives the title once the vehicle has been paid in full.

The Commuter Services Program is managed by TMACOG staff, working with TMACOG's Commuter Services Council.

## **UNMET NEEDS – GAPS IN SERVICE – OVERLAPS IN SERVICE**

Information on unmet needs and gaps and overlaps in transportation services have been compiled from several sources. In 2003, the region completed a Regional Transit Study which looked broadly at public transportation services in the Toledo region, including Lucas and Wood Counties. Information on unmet needs and gaps in transportation services was gathered through:

- A community survey of residents
- Focus groups with target population groups
- Public meetings
- Stakeholder interviews
- Outreach resulting in phone, mail, fax and email input

Secondly, technical analyses were completed focusing on detailing needs and gaps related to TARTA's fixed route bus service.

Finally, human service agencies reporting transportation service were asked about gaps in and barriers to transportation services. Second, unmet needs gaps and overlaps were explored during community outreach activities that included:

- Meetings with TMACOG's Human Service Transportation Committee
- Two workshops hosted by the Mobility Alliance of Northwest Ohio

### **Unmet Transportation Needs**

Unmet needs of the target populations may be ascertained in a number of ways. In the development of this plan, stakeholders serving them were given the opportunity to express their thoughts during meetings and workshops. The unmet needs expressed below have been developed from those meetings and workshops and a comment card that stakeholders and others could use to express their thoughts. In addition, Significant outreach and public participation was conducted in the development of The Regional Transit Study.

The unmet needs expressed below were developed through the community outreach during the transportation coordination planning included the following:.

#### **Older Persons**

- Transportation is the highest need
  - Medical appointments
  - Escort services for shopping, etc.
  - Socialization
  - Church
  - Fitting appointments into available transportation options

- Conflicts in providing service - Not enough services to take seniors to hospitals and shopping
- Travel to senior center - not enough service or volunteers
- Knowing when to give up driving
- Difficulty knowing pick-up bus has arrived - hospitals, U of Toledo
- Long waits for return trip pick-ups
- Difficulty of driving after dark
- Not knowing the location of the nearest senior center
- On-going health needs - OT, PT, dialysis, radiation, etc.

### People with Disabilities

- Employment in suburban communities
- Work shifts - 10 pm to 3pm or 4pm - Options are expensive - taxis, etc.
- People with new onset disability may live in a suburban area without bus service
- Where to get information on services - 211?

### Low Income Individuals

- Must make long trips on fixed route services, especially with children and daycare
- May not have computer access to get information on available services

## Gaps in Services

Gaps in transportation services for older persons identified during the transportation coordination planning included:

- Looking for help to increase service capacity
- Harder than ever to replace vehicles
- Need safety standards
- Perrysburg senior center has no transportation
- Funding to meet needs in insufficient

Gaps in transportation services for persons with disabilities identified during the transportation coordination planning included:

- TARTA fixed route service is different on weekdays and Saturdays
- TARPS service needs same day trip reservations; for medical - only option may be 911
- TARPS must deal with an inaccessible environment - streets, sidewalks, building access
- Taxi service has only one accessible vehicle
- Poor and snow-covered sidewalks
- Travel training is in place for MRDD clients; need training for non-MRDD persons with a disability
- Training may be as simple as familiarity training and mentoring



- Need same day TARPS service for some trips

Gaps in transportation services for persons from low income households identified during the transportation coordination planning included:

- Lack of transportation when TARTA does not operate
- Lack of transportation outside TARTA's service area
- Employment during evening hours - no car; outside service area
- Lack of or unreliability of car

Gaps in public transportation services were identified during extensive outreach activities and analysis during the TMACOG Regional Transit Study. What follows below are the findings in that study.

Principal conclusions reached in the Regional Transit Study are presented below and in the maps shown on annotated Figures 3 through 6. General conclusions are:

- No comprehensive public transportation serves the needs of the whole region
- 30% of the region's transit-supportive area lacks service
- 47% of the region's population is not served
- Access from low-income areas to suburban employment is a challenge
- Lack of reliable transportation hampers suburban work access
- As people get older, they age in place, in the suburbs

### **Gaps in Transit Service for Special Populations**

There are un-served areas with relatively large populations of elderly, disabled, young, and lower income people. Examples include:

- Oregon and the Walbridge/Lake Township areas show densities of 50-100 senior citizens per square mile.
- Youth age 5-17 reside in suburban areas at densities of 50-200 or more per square mile, including Oregon, Northwood, Springfield and Perrysburg Townships, and the Waterville/Whitehouse area.
- More than 10 of every 100 residents have some form of physical disability in such areas as northern Wood County and western Lucas County.

Elderly, disabled, and young people are among those most likely to rely on transit. About 15% of the population of the TMACOG region has some form of mobility or cognitive disability. About 28% are over age 50, and nearly 14% are over age 65. The number of persons in the region aged 65 and over is projected to increase by more than 30% in the next 20 years. This also increases the number of disabled in the population.

Lack of full geographic coverage and interconnectivity limits the mobility of the disabled and other non-driving populations. This impacts employment and health care options. Study comments suggested that a fully regionalized paratransit system for disabled persons would be desirable.

Demographic trends indicate an aging population in the region, increasing percentages of the population in the active work force, and delay of retirement. These are indicators of need for additional transportation options for all populations in the region, especially older citizens.

### **Lack of Service to Transit-Supportive Areas**

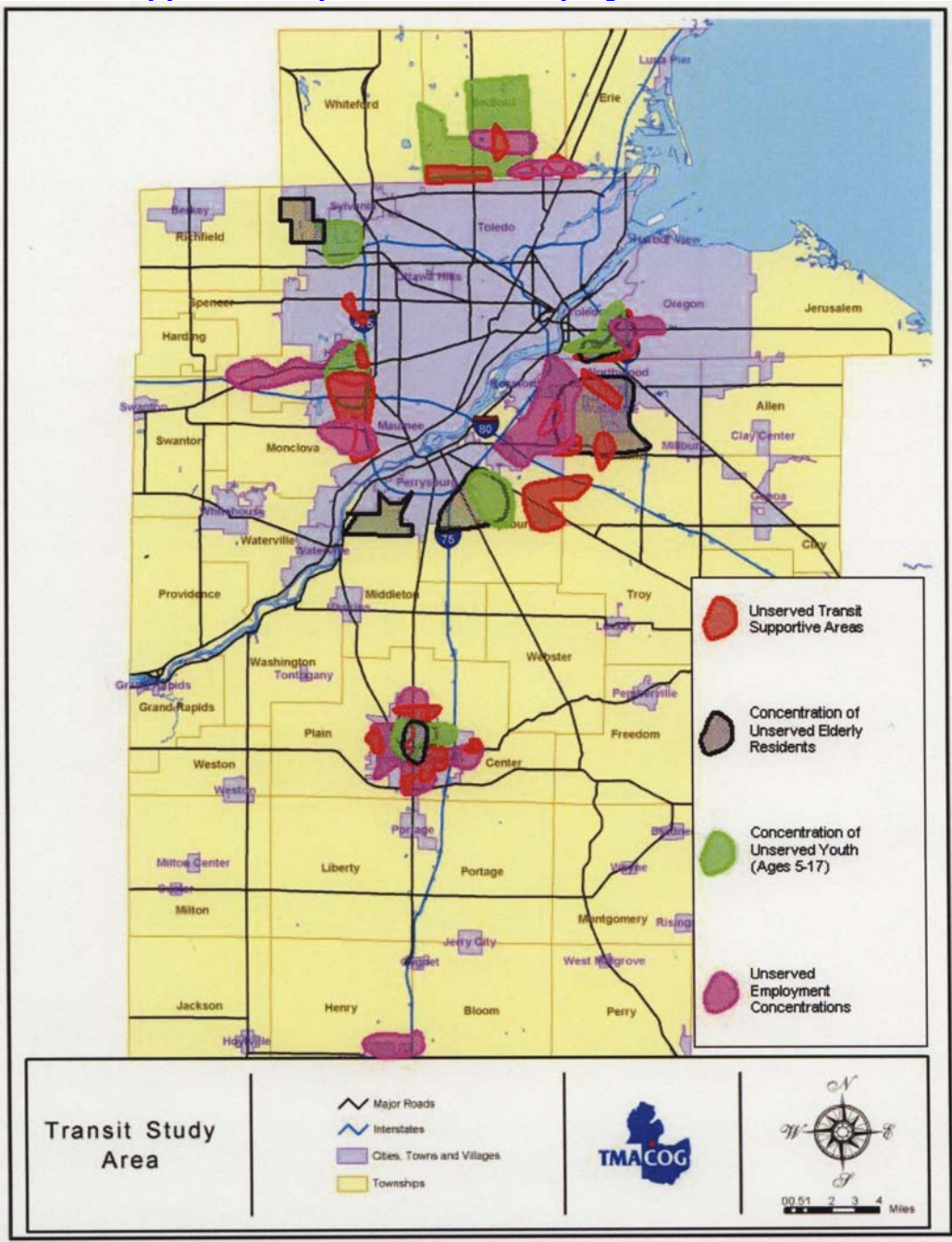
The study identified areas with the combined population and employment densities to qualify as "transit-supportive areas." However, 30% of this transit-supportive area lies outside the full service transit network. See Figures 6 - 9.

These transit- supportive areas are major concentrations of employment and population, and in many cases serving them would actually increase the efficiency of the existing transit system. The TARTA network is the only transit service in the area that provides reasonable connections to regional employment, shopping, health care and entertainment centers.

Because the region lacks transit with full geographic coverage, travelers cannot make trips between many important trip generators. For example, it is impossible to travel between Bowling Green State University and either Medical College of Ohio or the University of Toledo. Owens Community College and Monroe County Community College, the region's two associate-degree granting institutions, are poorly connected by transit either to one another or to the University of Toledo, and are isolated from Bowling Green State University.

The lack of geographic coverage also limits the choices of transit dependent consumers of retail, medical and professional services, and distorts normal patterns of travel and consumer choice based on the availability of transit services. Under the current system, consumers are which shopping center, which grocery store, which hospital and which doctor they use, based on transit access, rather than on the basis of price, quality of service, or even in many cases, physical proximity. For example, many consumers in East Toledo apparently choose to go to St. Vincent's Hospital in West Toledo, rather than St. Charles Hospital in Oregon (which is physically closer) because of the lack of transit service to St. Charles Hospital. Nearly one-third of respondents to the informational survey said they chose their home based on availability of transit. More than one fourth of respondents chose their job, their doctor, and where they shop, based on transit availability. Citizens desire access to specific areas in the region (such as Oregon and Perrysburg Township), specific shopping centers and stores (such as Wal-Mart in Oregon, Spring Meadows and Woodville Malls) and specific medical facilities (St. Charles, Bay Park and Wood County hospitals). Many of the region's major recreation destinations (Maumee Bay State Park) also lie outside the regional fixed-route transit network, and thus are inaccessible to those who use transit.

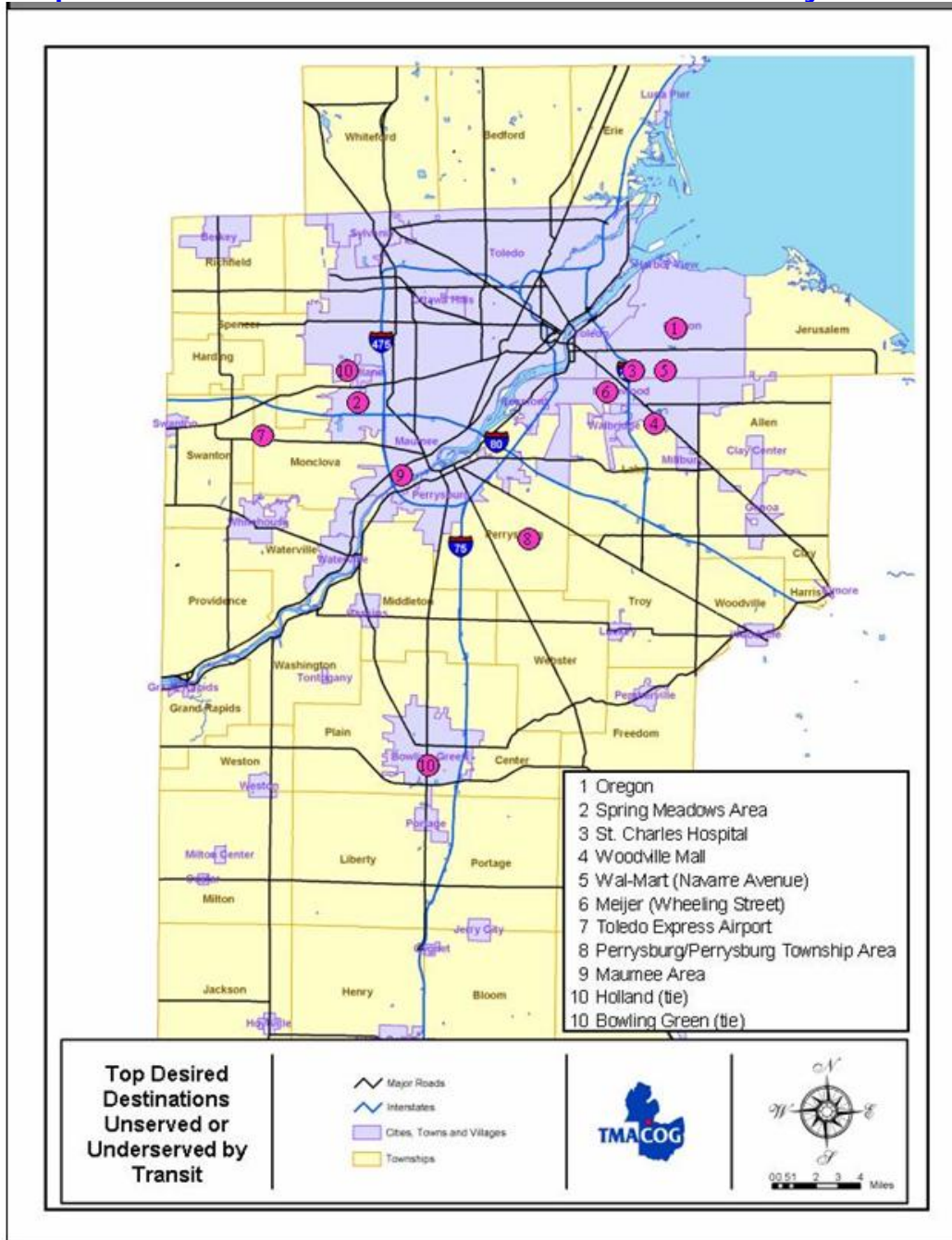
**Figure 6**  
**Transit- Supportive Population and Employment Areas unserved by TARTA**



**Demographic Areas of Concern:** This map shows concentrations of transit-supportive population and employment, plus concentrations of elderly and youth, in areas not served by the regional fixed-route transit network.

Source: TMACOG, Regional Transit Study, 2004.

**Figure 7**  
**Top Desired Destinations Unserved or Underserved by Transit**

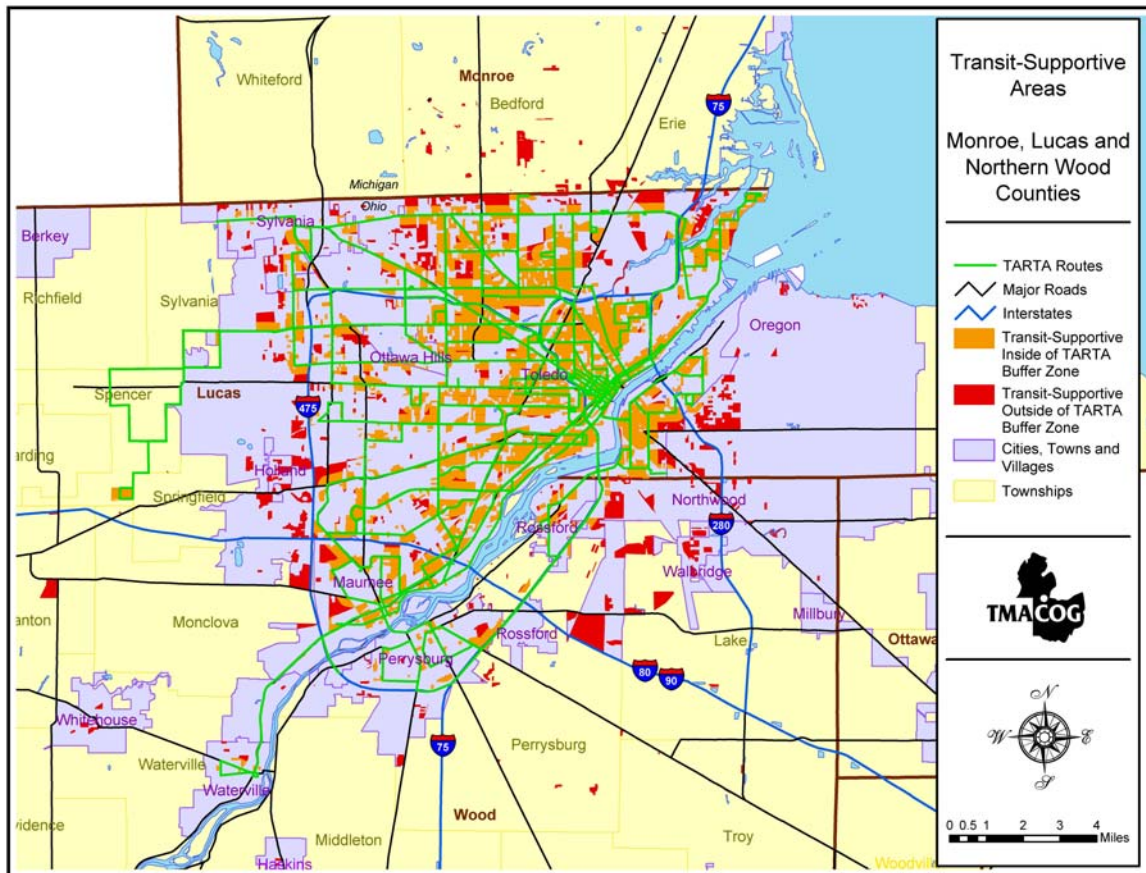


**Top Destinations:** Members of the public indicated nearly 100 locations they would like to reach by bus that were not accessible to them. These are the “top 10.”

Source: TMACOG, Regional Transit Study, 2004.



**Figure 8**  
**Areas within and beyond TARTA's Fixed Route Service Area**  
**Supportive of Transit Service**



Source: TMACOG, Regional Transit Study, 2004.

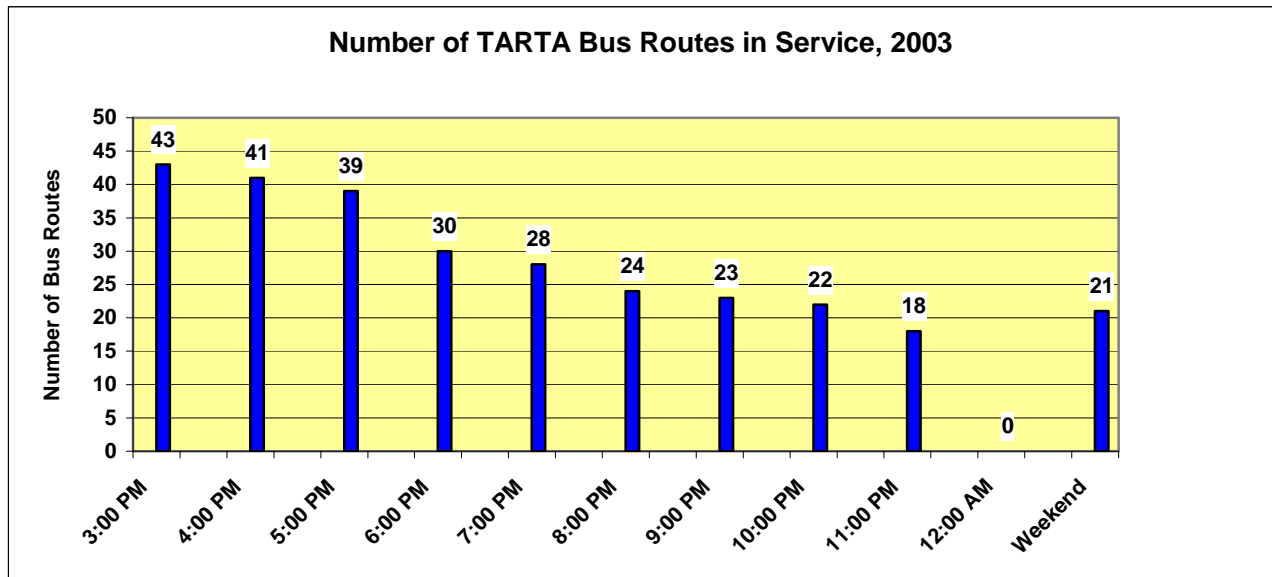
### **Lack of Service for Suburban and Rural Residents**

Forty-seven percent (47%) of the population of the region lies outside the full service fixed-route transit area. There is no public transportation service and no connection to the regional transit network in medium-to-higher density residential areas in suburbs such as Oregon, Northwood, Perrysburg Township, Monclova Township, Springfield Township, and Holland. In the informational survey conducted for the study, hundreds of suburban residents, particularly older people and disabled people, expressed their desire for public transit to serve their neighborhoods. These comments were received at public meetings and in the informational surveys collected over the course of the study.

## Lack of Access to Business and Industry

Lack of geographic coverage and connections and limited evening, night and weekend service curtails access to jobs for residents, particularly for those who are without private transportation. (See figure 6) The analysis of employment location indicates 57% of the jobs in the study area are not connected to the TARTA regional transit network in such a way as to support work trips. Lack of transit service in suburban areas blocks access to suburban jobs for workers throughout the region. The CommuterLINK Study, conducted in 2001 by researchers at the University of Toledo, indicated that 3 out of 10 CommuterLINK client workplaces lie outside the TARTA weekday service area, and more than half lie outside their weekend service area.

**Figure 9**



Source: TMACOG, Regional Transit Study, 2004.

Growing suburban commercial and industrial areas in Oregon, Springfield and Monclova Townships, Perrysburg Township, and other jurisdictions are not accessible using public transportation. The current lack of service, or limited service, in employment areas like

Perrysburg Township and Arrowhead Park limits the flexibility of the transit system to serve business and industry in the region. It separates employees from jobs, and employers from workers. Residents of the northern portion of the study area are prevented from access to job and educational opportunities in Bowling Green.

The job market is changing, and fewer people work a standard Monday-through-Friday, nine-to-five schedule. Nationally, the percentage of employees with flexible work

schedules has increased from only 12% in 1985 to nearly 29% in 2001. 14.5% of the full-time workforce works exclusively outside the traditional workday, including evening, night and rotating shifts. 26% of retail sales and cleaning service workers, 30% of the health care industry, and 40% of food service workers work a non-traditional shift. Among production workers, more than 30% work a non-standard employment situation, and more than 15% work in shifts in continuous 24-hour operations. These national figures are supported by local data: a Toledo area Employers' Association survey found that, among responding companies, approximately 28% of the reported staffing schedules were for a non-standard work week. Such schedules are difficult to serve with public transportation.

Non-weekday schedules are difficult to serve with public transportation. TARTA begins reducing the number of bus routes operating in the early evening, and all service ends during the 11:00 p.m. hour (See Figure 6). TARTA also provides fewer routes and less frequent service on weekends. The region's other public transit agencies provide little, if any, night, weekend or holiday service. Survey respondents stated inadequate time-of-day coverage is a significant problem (both for work and non-work trips). Workers reported lost wages and lost job opportunities because of inadequate transit service hours. Students at the region's universities and community colleges, many of whom work, also find it difficult to use transit while maintaining their school and work schedules. In the next 20 years, manufacturing employment will not grow and may decline slightly. Employment in service sectors such as retail trade, finance, and general services, will grow 10% to 25%. Transit Study survey results indicated that work schedules that vary day-by-day and week-by-week, and include late night and weekend shifts, are already common in this region. Further shifts to service employment will make variable schedules even more common.

To be effective, transit must, at minimum, serve the needs of people entering the work force. A study of participants in the CommuterLINK program, which provides transportation to new workers, found that 68% could not use TARTA for their trips both to and from work because bus service didn't operate at the time that one of the trips occurred. This rose to 85% for those that worked weekends. The study also determined that 3 out of 10 CommuterLINK client workplaces lie outside the TARTA weekday service area, and more than half lie outside their weekend service area.

Some employers reported having difficulty filling even relatively well-paying jobs in suburban areas during the labor shortage of the late 1990s. Demographic trends show a drop in the number of people in their prime employment years (21 to 65) in the TMACOG region, pointing to future labor shortages potentially more severe than those of the late 1990s.

Employers of lower-to-moderate income workers in suburban areas interviewed for the study have significant problems with attracting and keeping employees and with tardiness and absenteeism, due to workers' lack of reliable transportation. In evidence

of this problem, companies have:

- Approached TARTA and local governments to request transit,
- Considered subsidizing the creation of new bus routes, as Owens Community College has done to provide transportation for its students and employees; and
- Considered developing their own transportation services, either individually or shared with other employers, to provide reliable employee transportation.

Transit users who responded to the informational survey and attended public meetings said they needed to get to locations outside the existing transit service area to seek jobs.

Another employment issue is the aging of the workforce. The number of people in the TMACOG region aged 55 and older will increase by nearly 50% over the next 20 years, while the number of younger adults will fall. However, employment in the region is expected to grow significantly. These two trends suggest that more people will continue to work past “retirement age.” Older people are more likely to use public transportation than younger, and are also more likely to be disabled (about 40% of study area residents aged 65 or older are disabled) and thus more dependent on public transportation.

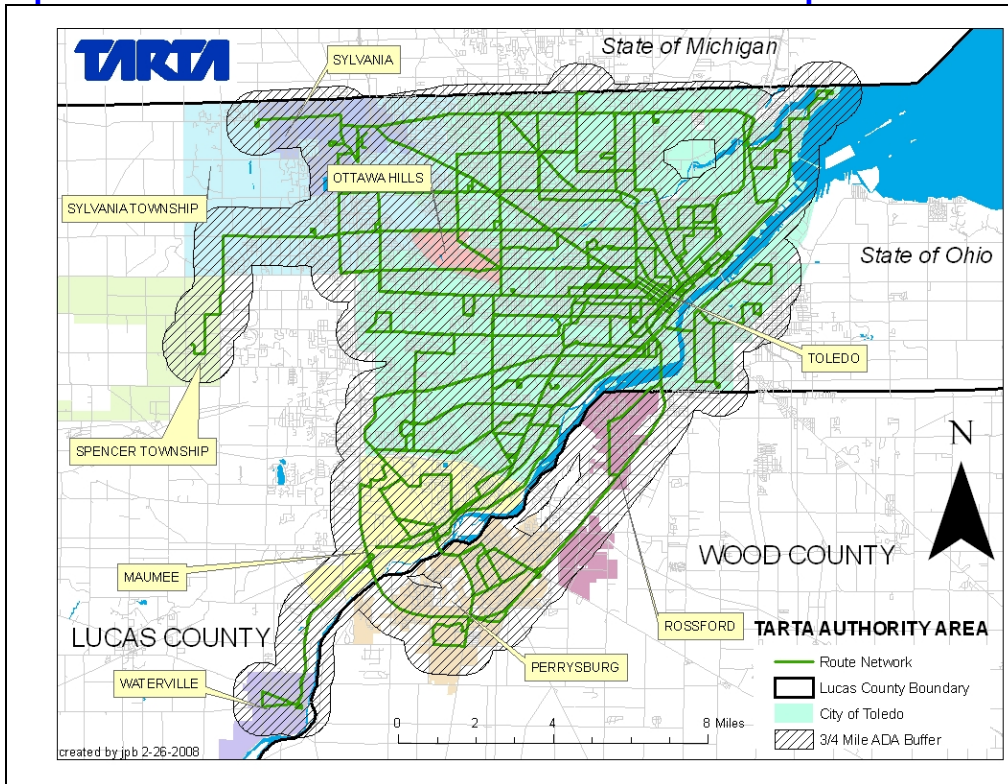
All of these employment trends, taken together, point to more need for public transit. However, they also produce travel patterns that are extremely difficult to serve with traditional fixed-route public transit.

## Overlapping Services

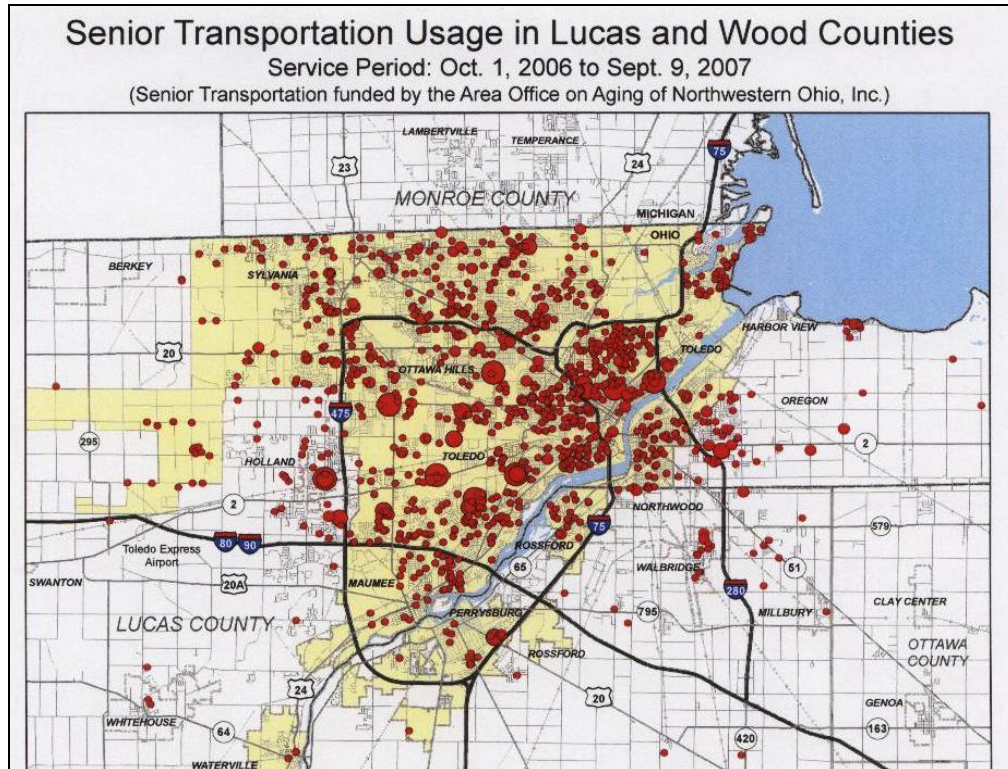
The transportation services offered by public transportation systems and human services agencies in metropolitan areas like Toledo typically overlap with transportation services provided by area agencies on aging and agencies that serve persons with mental retardation and developmental disabilities. Figure 7 shows the significant overlap in transportation services among TARTA’s TARPS service (the shaded area in the top map in Figure 7) and transportation services funded by the Area Office of Aging of Northwest Ohio, Inc (the bottom map in figure 7). TARTA covers this area with its complementary paratransit service for older persons and persons with disabilities who meet eligibility requirements of the Americans with Disabilities Act. The Area Office is funding transportation services that provide transportation to older persons who are 60 or more years of age. The maps presented earlier show that Toledo especially has concentrations of older persons and persons with disabilities, all of whom receive transportation services from TARTA’s TARPS service and transportation services provided by the Areas Office of Aging of Northwest Ohio and the Lucas County board of Mental Retardation and Developmental Disabilities.



**Figure 10**  
**Overlap in TARTA Paratransit Service and Senior Transportation Services**



Source: TARTA



Source: Area Office of Aging of Northwest Ohio, Inc.

# V

## COORDINATING TRANSPORTATION SERVICES

There are a myriad of federal programs that provide funding for the delivery of transportation services to older persons, persons with disabilities and persons in low income families. At the federal level, over sixty (60) separate programs have been identified. Within the U.S. Department of Transportation's Federal Transit Administration, financial assistance programs for the support of local public transportation services have been in place and evolving for some forty years.

It was in the late 1960's and early 1970's that the ownership and delivery of public transportation services shifted from the private to the public sector, as the private market for transportation services was no longer profitable. But, communities recognized that not all people would be able to meet their mobility needs without some level of public transportation services. Consequently, local communities took over ownership and control. Over time, local communities and state governments developed programs by which local communities could set up new agencies to control and operate public transportation

As a result of actions over that last thirty-five years or so, the following has occurred to provide financial assistance to public transportation systems in metropolitan areas:

- The Toledo Area Regional Transit Authority (TARTA) was formed as a regional transit authority, consistent with the Ohio Revised Code and serves communities in Lucas and Wood Counties.
- The legislature of the state of Ohio has funded programs to support the delivery of public transportation services across the state, in urban and rural counties.
- The Federal Transit Administration funds for operating and capital assistance from its 5307 Urban Program, providing federal financial assistance to public transportation systems in metropolitan areas of the country.

In addition, new Federal Transit Administration programs were introduced or modified in 2005 with passage of SAFETEA-LU, namely the 5310 Elderly and Disabled Individuals, the 5316 Job Access and Reverse Commute and the 5317 New Freedom programs.

Further, there are a large number of programs across government departments and agencies that provide human services for persons in need. Many of these programs provide services to older persons, persons with disabilities and persons in low income

families. In over sixty of the financial assistance programs, transportation services may be provided by human service agencies to help clients get access to program services. Typically, the provision of transportation services is elective by the agencies providing services, not mandatory.

It is generally agreed that there are insufficient resources available from local, state and federal sources and through private funding and contributed services to meet the mobility needs of older persons, persons with disabilities and persons in low income families. Further, it is generally accepted that transportation services offered independently of one another, servicing older persons, persons with disabilities and persons in low income families operate in the same neighborhoods, especially during weekdays morning and afternoon hours as clients are transported to agency services.

## **DEVELOPING A FAMILY OF TRANSPORTATION SERVICES**

Transportation services available to people with mobility needs can take various forms. Typically, transportation services include fixed route bus service such as is operated by TARTA. TARTA's service includes complementary paratransit service, sometimes called door to door or demand responsive service, provided by TARTA to maintain compliance with Americans with Disabilities Act requirements. By whatever name, this service distinguishes itself from fixed route in that smaller vehicles respond to the specific trip patterns that people need to make. Such service may include driver assistance for customers to get on and off a vehicle or to and from a vehicle. In rarer circumstances, assistance is provided "through the door". Through the door service is usually provided by human service agencies rather than public transportation systems.

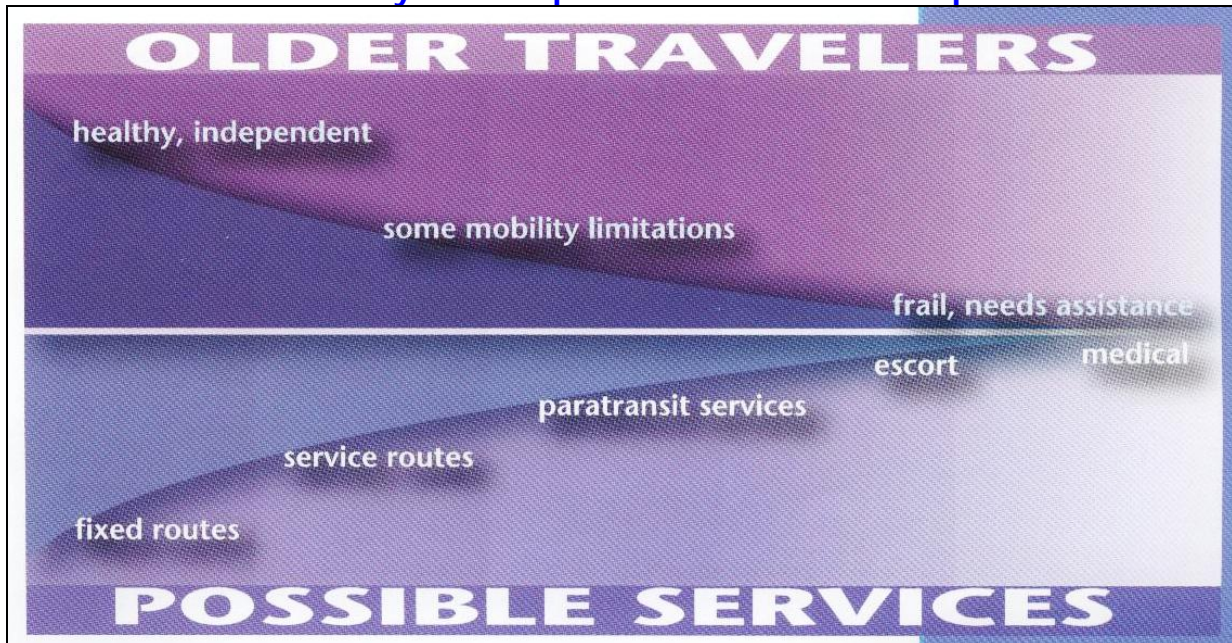
The concept of a "*family of transportation services*" is rooted in and recognizes the notion that transportation services should be responsive to the specific needs of customers, the variety of trips that they need to make, and the urban-suburban-rural character of the area within which the services are provided. The concept recognizes that older persons, persons with disabilities and persons in low income circumstances may have very different needs and services may need to be tailored to be responsive to those needs. Without being comprehensive, these may include:

- The lack of access to a motor vehicle
- A disability which prevents them from driving
- Not having family members or friends available to help them travel locally
- Inability to walk a reasonable distance to a bus stop or to be able to wait at a bus stop during hot or cold weather
- Living in an area where urban fixed route bus service is not feasible

Figure 11 presents a chart that characterizes the concept as it relates to the travel mobility and needs of older persons.



**Figure 11**  
**A Family of Transportation Services Concept**



Source: Transit Cooperative Research Program Report #82, Improving Public Transit Options for Older Persons.

Older persons are able to make independent travel decisions as long as they are healthy and able to move about independently outside their homes. However, as their ability to move about their community independently diminishes, they require alternative means of transportation to maintain their ability to meet travel needs and quality of life. With a family of transportation services available in a community, the services are available to do this.

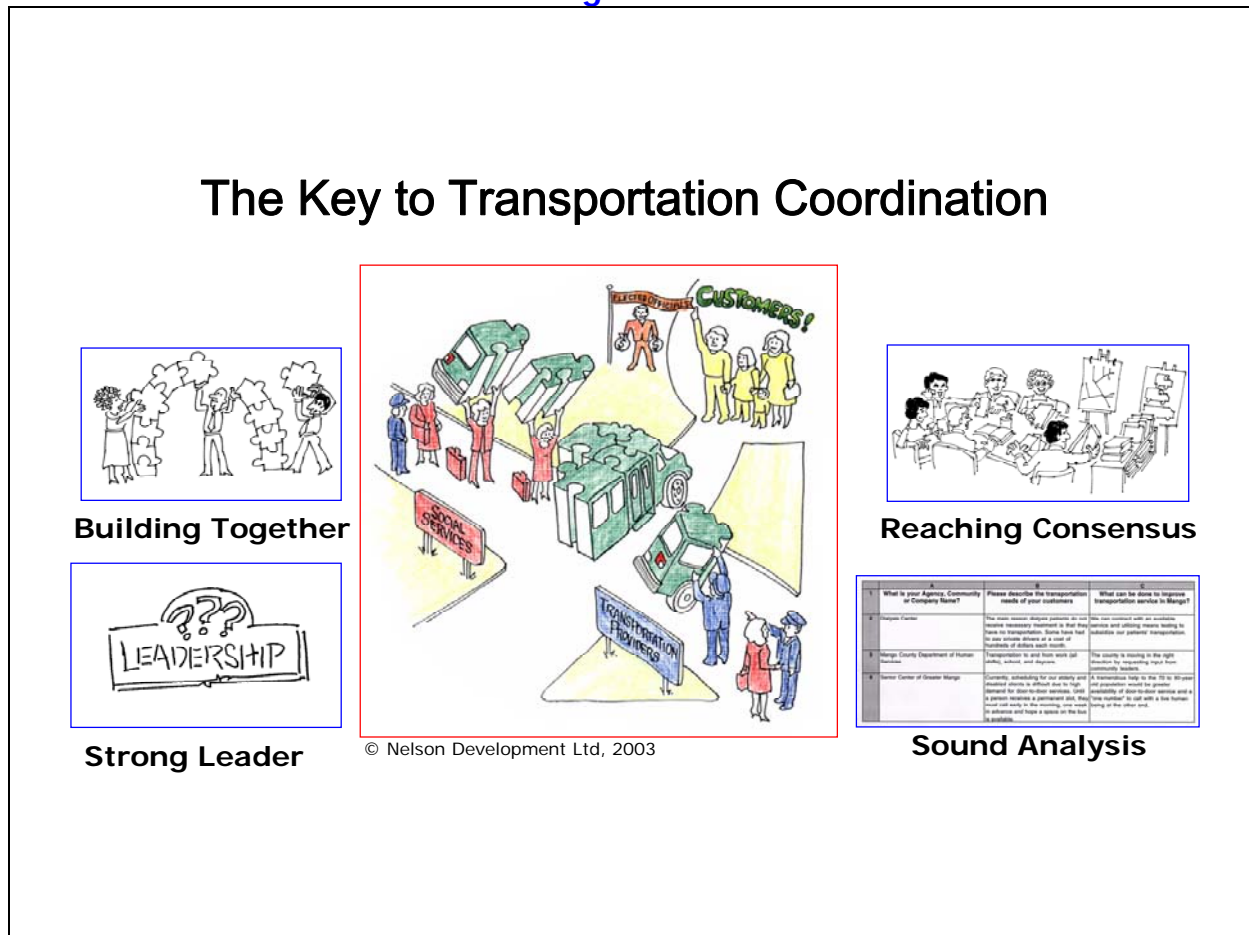
An important element of the concept is customer service that recognizes the need for information, training and planning so older persons, persons with disabilities and persons with low income are able to make the most effective use of the transportation services that are available in the community.

## **WHAT IS TRANSPORTATION COORDINATION?**

The coordination of transportation services focuses on bringing together in a community all of the key people and organizations that have responsibility for helping people meet their mobility needs in ways that permit decisions about what services are offered and

who offers them are driven by an understanding of who are the customers, what are their needs and what kinds of services under which circumstances can be most cost-effective and cost-efficient in meeting those needs safely and responsively. The key to transportation coordination success is cooperation, collaboration; consensus building and vision (see Figure 12).

Figure 12



Transportation coordination, as expressed to figure 4, works best in circumstances where the following conditions exist:

- Customers and meeting their needs are the number one focus.
- There is strong leadership among the key stakeholders and a shared commitment to organize and deliver coordinated services together and reach consensus in setting priorities and taking action.
- Transportation providers work cooperatively and collaboratively with human service agencies to understand the needs and requirements of the agencies and their clients.

- Social service agencies work cooperatively and collaboratively with transportation providers to understand the responsibilities of delivering transportation services in a complex environment.
- The agencies and communities, including taxpayers, which provide funding for transportation services are satisfied with the development and delivery of services, the use of funding for eligible purposes, and the reporting of results and the use of specifically targeted funding programs

## **TRANSPORTATION COORDINATION ALREADY IN PLACE**

It is important to recognize the types of coordination that are already in place before moving on to consider the alternatives for future coordination strategies. The following provides an overview of some of the key findings to date and how they can impact on the various coordination options that can be considered. The focus is on the current state of coordination between public transit and human services because this provides us with the opportunity to explore strategies that build upon the existing base of coordination activities. The following examines the current situation.

### **Inter-Agency Contracting for Transportation Services**

There are several examples of contract relationships for transportation services among the agencies and organizations in the Toledo region.

- A number of agencies in the region purchase bus passes and tickets from TARTA to subsidize the cost of using TARTA's fixed route service by their clients.
- Brookside Ambulette service contracts with Diversified Transportation services
- Jewish Family Services coordinates access to its center with PASSPORT, DAMI, Positive Connections, Job and Family Services, school systems and Logisticare.
- Community Development Centers coordinates with TARTA.
- Wood County MRDD coordinates with Wood Lane residential and twelve school districts.

# VI

## MOVING TOWARD THE COORDINATION OF TRANSPORTATION SERVICES

When considering strategies and solutions for transportation service coordination focused on increasing the travel mobility of older persons, persons with disabilities and low income persons, and the general public, the deviated fixed route and demand-response public transportation services offered by TARTA in the Toledo region should be viewed as the backbone of any system of coordinated transportation services in the region. Focused on its community members in Lucas and Wood Counties, there is a level and coverage of fixed route services available to the general public and therefore older persons, persons with disabilities and low income persons that affords them fundamental mobility that would not otherwise be available for them to meet their travel needs. Human service agencies help their clients, in a number of ways, to use these services. The value of public transportation services to helping people meet their mobility needs cannot be emphasized enough.

Any program to coordinate transportation services should be built on the fixed route services that are in place. These services should be used to the maximum extent possible, since there is little or no cost associated with more people using the services. The capability to meet mobility needs is there and should be used.

TARTA's fixed-route and complementary paratransit service cannot be expected to meet all mobility needs. In reality, to better meet mobility needs, TARTA and human service agencies in the region can work better together to coordinate the development and delivery of transportation services.

This section begins with a discussion of Mobility Management because it is an essential part of the coordination planning process.

### **MOBILITY MANAGEMENT**

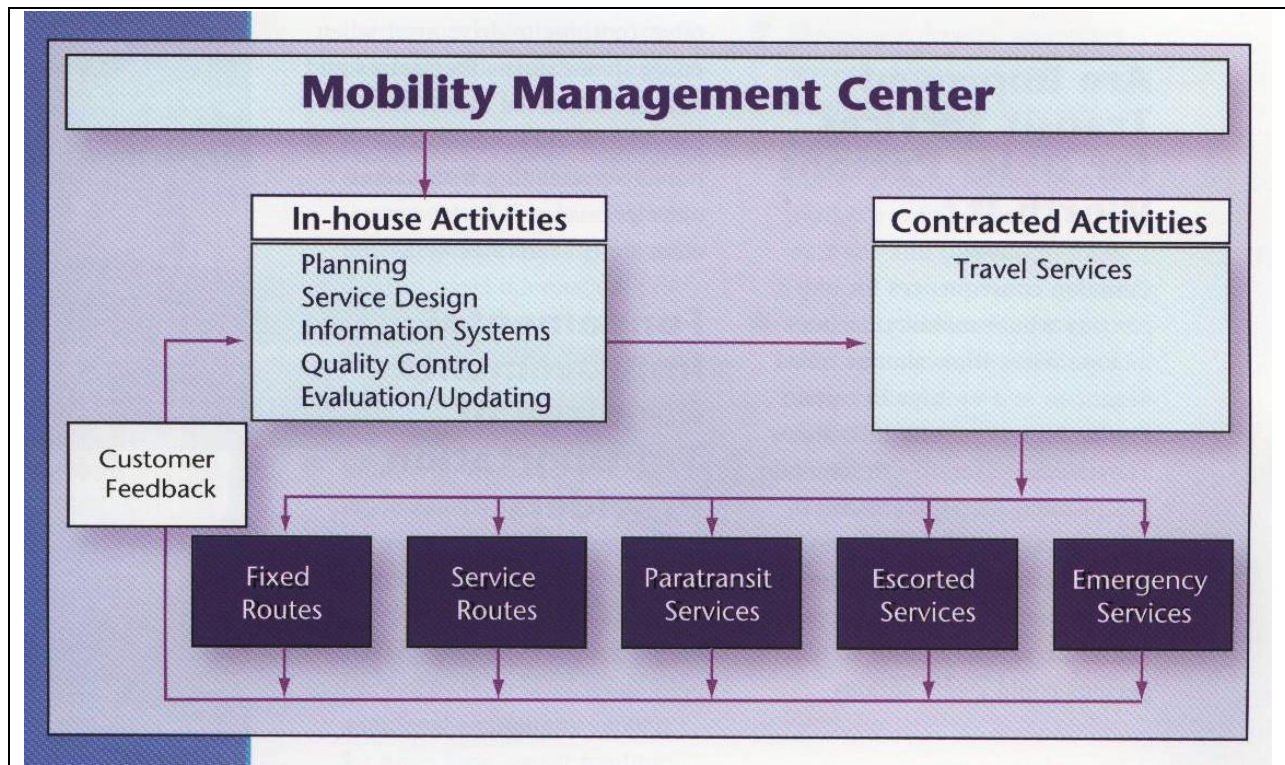
Mobility Management should be the overarching strategy or overall approach to the coordination of transportation services. Mobility management consists of short-range planning and management activities and projects for improving coordination among public transportation and other transportation service providers in a county or region. Hence, mobility management is a program which strives to match people with mobility



needs with the resources that can meet their needs with the least cost. It includes everything from mileage re-imbusement (for trips it is less expensive for family and friends to provide than sending a bus out) to travel training to enable people to use the least expensive option for their travel and to know when a TARTA deviated fixed route or demand-response bus might be available for their trip.

It represents a shift in focus from the operation and management of separate transportation services to one of customers, their mobility needs and offering and coordinating the family of transportation services that enables communities to meet those mobility needs in safe, effective, efficient and responsive ways. A good structural representation of mobility management is presented in Figure 13.

**Figure 13**  
**A Mobility Management Concept**



Source: Transit Cooperative Research Program Report #82, Improving Public Transit Options for Older Persons.

The current transportation legislation (SAFETEA-LU), mobility management is recognized as a key element in the delivery of transportation services in a county or region and has been made eligible for capital financial assistance. Thus, federal funds may be used to move the development of mobility management and transportation coordination forward with funding from present programs. Local matching funds required are low; the federal share is 80% with a 20% local share of total capital costs.



The following provides four representative examples of the many types of activities that can be considered for mobility management funding in Federal Transit Administration programs – 5316 – Job Access and Reverse Commute, 5317 – New Freedom and 5310 – Elderly and disabled Persons, based on published FTA Circulars for federal funding:

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

Each of the above "approved mobility management activities" could be successfully applied in the Toledo region.

A major recommendation that emerges from the plan development effort is that the region should shift the focus of transportation services to mobility management, instead of continuing with the "silo model" - where separate agencies develop, fund and operate independent transportation services, focused narrowly on meeting the needs of their own agency's clients without concern for other transportation services in the community or other agencies that are also providing human services to their clients.

The pacing of the shift in focus to mobility management will depend upon the ability of the participating agencies to work effectively together and their commitment to moving forward on the selected coordination activities.

## **COLLABORATIVE MOBILITY MANAGEMENT AND TRAVEL PLANNING**

Mobility management shifts the focus from operating individual transportation services to helping people with unmet mobility needs. This means that transportation services are designed, developed and delivered to meet the mobility needs of people in the region. And those needs can be very different across the target populations. For example, the mobility requirements of a young mother with two young children in the City of Toledo are very different from an elderly couple in their eighties, living in a suburban community who need to reduce or stop driving and do not have family or friends who are able to help them significantly. Both have mobility needs that are important. How specific trips are provided would not necessarily be the same.

In a mobility management setting, proactive trip planning is a key activity. See Figure 11.

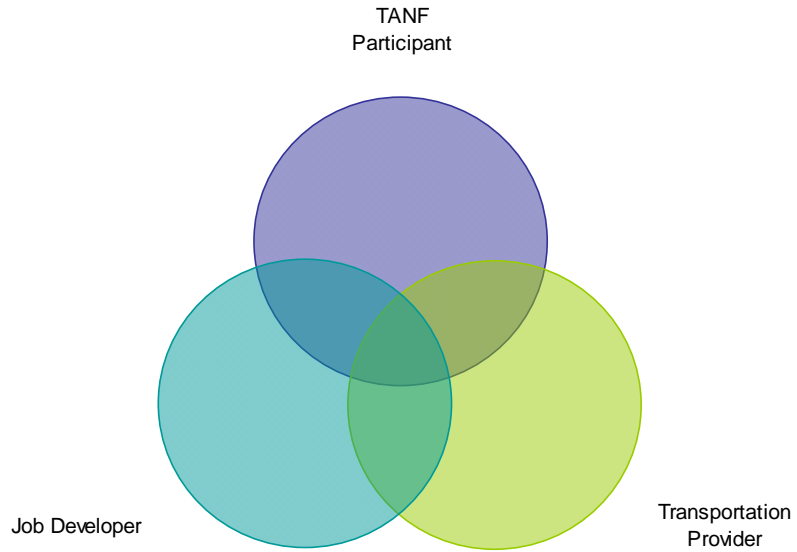
### **Mobility Management for Workforce Development and Training**

Mobility management in the environment of the Ohio Works First (OWF) program would focus on the mobility need of low income people finding a job and providing the most responsive, cost-effective transportation available. A key element is addressing the transportation options early as employment and training options are developed by job developers and Ohio Works First participants. . This means that the mobility manager is a partner with the job developer in offering the best recommendations to low income people who need a job that they are able to reach on a daily basis.

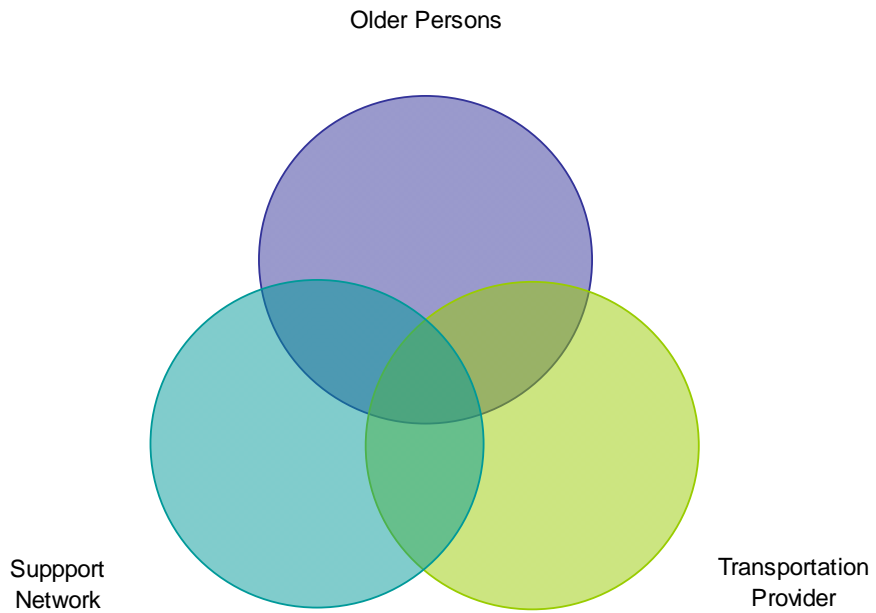
### **Mobility Management and Maintaining Quality of Life**

As people age and lose their ability to drive safely, community transportation alternatives should be available for their use so that they are able to continue to travel where they need to go. For this to happen effectively and seamlessly, travel mobility planning should occur so that older persons are prepared for a transition from driving to using non-driving alternatives. Communities should plan to be ready for these transitions as well. This will require the participation of older persons themselves, family members, medical professionals, social service professionals and mobility managers, acting together, to make sound decisions about maintaining mobility while reducing or curtailing driving. For older persons, the objective needs to be finding a way to maintain mobility and independence while relying on a personal vehicle less and less.

**Figure 14**  
**Mobility Management Triangle**  
**for Labor Force and Job Access**



**Mobility Management Triangle**  
**for Sustainable Mobility Planning**



# VII

## STRATEGIES AND SOLUTIONS FOR COORDINATING TRANSPORTATION SERVICES

### TRANSPORTATION COORDINATION STRATEGIES

The coordination of transportation services in the Toledo region was considered and evaluated through the following strategies:

- Do Nothing
- Central Information Source
- Central Trip Planner/Broker
- Coordinate Administrative and Operational Transportation Functions
- Add New Services
- Consolidation of All Transportation Services

#### Do Nothing

Nothing would change; no efforts would be made to improve transportation services through better coordination among public transit and human services agencies, both in the delivery and management of services and the purchase of services. In other words, the action would be the status quo.

#### Central Information Source

To improve access to diverse and separately-operated transportation services, people needing transportation services are able to contact a single source, via telephone or computer, to find out how they may get a ride to meet a specific transportation need. Information on transportation services that may be available to them would be provided so they could make contacts to see if they could get a ride.

#### Central Trip Planner and Trip Broker

The delivery of transportation services would continue to be provided by separate transportation providers. However, a transportation broker would exist to coordinate the delivery of transportation services among participating providers and purchasers. Providers would use the broker to provide selected client trips for other providers and/or use the broker to find providers that would provide a trip for one of their clients.

#### Coordinate Administrative and Operational Transportation Functions

Selected functions in the delivery of transportation services would be improved by taking advantage of resources and capabilities that may be common among the providers. These

common functions could include vehicle fueling; vehicle maintenance; driver training; scheduling of trips and assignment of vehicles among participating transportation providers; tracking and reporting of operations; financial tracking, billing and payment.

### Add New Services

Transportation services that are not currently being offered would be introduced. These could include services that fill gaps in existing services; introduce a new type of service not currently available; services that would meet a need without providing transportation, such as package delivery.

### Consolidation of All Transportation Services

The delivery and management of all transportation services and associated functions would be organized within one organization or agency. Agencies formerly providing direct services would contract with this agency for their transportation needs. Agencies that formerly purchased transportation services from one or more providers would purchase their transportation through this agency.

## **WORKSHOP RESULTS OF THE EVALUATION OF TRANSPORTATION COORDINATION STRATEGIES**

The results of the evaluation of these strategies by workshop participants are presented in Figure 15. Stakeholders believe that the best approach for coordinating transportation services among public transit (TARTA) and the Toledo region's human services agencies is to focus on the following:

- Creating a centralized source of information to provide access to multiple agency, coordinated transportation services throughout the Toledo region
- Coordination of administrative and operating functions to improve the cost-efficiency of transportation services
- Consolidation of selected transportation services provided by separate agencies now

The details of the force field analysis are presented in Appendix III. The consensus reached among stakeholders is striking. With fifteen participants in the workshop, all fifteen felt that the coordination of transportation services functions among participating agencies is the top priority. The clear second priority is the establishment of a trip planning and brokerage system.

The results of the workshop express how stakeholders believe implementation of coordinated transportation services should move forward.

Figure 15

<b>RESULTS OF WORKSHOP PRIORITY RATING AND VOTES</b>	
<b>Transportation Coordination Strategies</b>	
<b>Lucas County</b>	
<b>Transportation Coordination Strategy</b>	<b>Priority Rating and Votes</b>
<b>Central Information Source</b>	
Priority Rating	9.0
First Priority Votes	7
Second Priority Votes	4
<b>Trip Planning/Brokerage</b>	
Priority Rating	3.0
First Priority Votes	2
Second Priority Votes	2
<b>Coordination of Administrative and Operations Functions</b>	
Priority Rating	6.5
First Priority Votes	6
Second Priority Votes	1
<b>Adding New Services</b>	
Priority Rating	0.0
First Priority Votes	0
Second Priority Votes	0
<b>Consolidation</b>	
Priority Rating	7.0
First Priority Votes	2
Second Priority Votes	10
<b>Total Votes Cast</b>	
First Priority	17
Second Priority	17
Note: Priority Rating is determined by giving 1st Priority votes a full point and 2nd Priority votes one-half point.	



## ORGANIZATIONAL AND INFORMATION STRATEGIES

For transportation coordination to move forward effectively, an organizational, management and service delivery structure must be established. This is what can be viewed as a First-Order Strategy. Strategies designated as First Order are those that require and involve fundamental decisions that must be made at the beginning of the transportation coordination implementation process. There are two key first order strategies:

- **Leadership – Implementation - Organizational Structure** – This refers to the need to have an organizational structure in place as the region begins to move forward on the selected coordination activities. The discussion of this recommendation includes the presentation of three different alternative organizational structures and some examples of best practices that help to illustrate the organizational arrangements that have been used and the types of coordination activities which have been implemented.
- **Centralized Communication - Information – Trip Scheduling – One Number Access** – this topic is designated as first order because there are important decisions to be made regarding the means for providing essential transportation resource information to the target groups, including the possibility of one number access. In this case there are two alternatives to be considered as part of the implementation – that can be characterized as the choice between a gradual low cost approach and a more comprehensive approach involving the extensive use of technology.

<p style="text-align: center;"><b>Leadership Implementation Organizational Structure</b></p>
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One of the most important “Lessons Learned” from our peer reviews from other regions is that in order for coordination to be successful, there must be a strong and dynamic “local champion” taking the lead in coordinating services. Without a single agency or individual taking charge and following through with a vision to transform services, major paradigm shifts would not have occurred. A strong leader with vision and the ability to persevere during the difficult implementation challenges is a necessary ingredient for transportation services to proceed under a new “mind set.”

From the earlier discussion of **Transportation Coordination Already in Place**, we have pointed out that both TARTA and human service agencies in the Toledo region have already taken steps to work together. Therefore, further advances in coordination

between public transit and human service transportation can build upon the existing working relationships that have been established.

It is important to note that a leadership role for TARTA does not mean that TARTA would automatically become responsible for “managing” coordination activities or providing transportation services above and beyond what they are currently providing. In the next subsection we present three options for the selection of a Mobility Manager with TARTA as public transit agencies being one of the options.

It is anticipated that the leadership role will be one that both provides a driving force in moving toward mobility management and keeps stakeholders at the table building consensus and making decisions. The first step in the process will involve the formation of an organizational structure that will actually serve as the mobility manager.

## **Strategies for Organizing For Mobility Management**

There are three basic organizational strategies to be considered for taking the responsibility for mobility management in the region:

- Public Transit Agency (TARTA)
- Existing Human Service or Umbrella Agency
- New Non-Profit Transportation Agency/Broker

Since there is such a diversity of coordination activities that can take place under the title of mobility management, it is important that whichever organizational alternative is ultimately selected has the capability to undertake the required role. The following provides some best practices examples of the different ways that public transit and human service agencies have worked together in a mobility management arrangement.

### **Public Transit Agency as the Mobility Manager**

Under this organizational alternative, TARTA would take the initiative and the responsibility for all mobility management activities. The actual operations associated with the selected activities could be carried out completely in-house or by a contractor depending upon the requirements for mobility management and the capabilities of the organization. The following provides an example of a transit agency that took on the responsibility for developing and operating a Call Center for participating human service agencies.

**The Rapid** (the **Grand Rapids** area transit agency) is the lead agency for coordination planning in the region. In early 2007, The Rapid initiated its centralized program called RideLink. The RideLink collaboration offers a centralized call and scheduling system for participating agencies. Currently, agencies can elect to subscribe all or some of their vehicles to the program. The original intention was to increase capacity and reduce costs for the participating agencies; on the whole, more service could be offered by reducing overhead costs of scheduling and dispatch.

The program began with the Area Agency on Aging and grew so quickly that the program had to be slowed down. The service was overwhelmed with calls from all the agencies clients and had to be scaled back to just one agency, which was then increased by one participating agency per month until all the agencies were back on board. In the one month in January of 2007 that all the services were united by the RideLink program, they handled more calls and rides than all the services had handled individually, even given that they had hit their capacity ceiling.

### *Existing Human Service or Umbrella Agency as Mobility Manager*

Another strategy to organize for taking on the responsibility for mobility management is an existing human service or umbrella agency. The following provides an example of a situation where an umbrella agency took on the responsibility for the development and implementation of unique coordinated human – public transit services.

**Ride DuPage – Chicago, IL** - In the **Chicago** area, **Ride DuPage** is the name of DuPage County's coordinated public transit human services transportation service. There are a variety of participants in Ride DuPage including Pace (the transit agency serving DuPage County), the County's Department of Human Services, a joint group known as the Naperville/Lisle Area Transportation Partners (City of Naperville, the townships of Naperville and Lisle, and the Naperville Park District) and the Village of Glen Ellyn.

The DuPage Inter-Agency Paratransit Coordinating Council, established in 1996, has been the key organization which was instrumental in the development and implementation of the current coordinated transportation system in the county. The IAPCC is made up of the following committees:

- The **Advocacy Committee** advocates on behalf of county-wide efforts to secure funds for transportation services, to communicate between DuPage Mayors and Managers and IAPCC for joint goal-setting, and to develop joint public-private partnerships.
- The **Consumer Advisory Committee** serves as the liaison between the consumer and the DuPage Inter-Agency Paratransit Coordinating Council.

- The **Finance Committee** oversees the development of the finance plan for the coordinated transportation system, financial commitments from sponsors, and dues for the council.
- The **Operations Committee** oversees the development of the coordinated transportation system and its management and operation plan.
- The **Marketing Committee** establishes a marketing plan to inform potential users about the coordinated transportation system and inform potential sponsors and the general public about the system.

Membership in the IAPCC is extensive and includes seven townships, six cities, fifteen villages and nineteen other agencies/organizations (including the Illinois Department of Transportation and Department of Human Services).

The service is provided by a private contractor (Veolia Transportation) under contract to Pace, but unlike ADA Paratransit and Dial-a-Ride, users of Ride DuPage will be assigned to either an accessible paratransit vehicle (operated by Veolia) or to a local taxi company (303 Taxi or Alliance Taxi), depending upon which is more cost-effective. Pace is responsible for managing and monitoring all of the paratransit services provided by Veolia. As part of this responsibility, Pace allocates the cost of providing Ride DuPage services to all of the participating agencies according to a cost-sharing formula. Note that the ADA, Dial-A-Ride, and human service agency trips are all merged together under the contracts with Veolia Transportation. As a result, ADA paratransit trips, Dial-A-Ride trips, and human service agency-sponsored trips are co-mingled on the vehicles operated by Veolia, leading to a more effective utilization of the fleet.

### **[New Non-Profit Transportation Agency/Broker as Mobility Manager](#)**

The third organizational strategy for a mobility manager is the development of new non-profit transportation agency devoted to serving the needs of the target population. This agency would work in close cooperation with the existing public transit agency, and could provide specialized services to the transit agency whenever it is cost-effective. The following example cites the experience of two non-profit transportation agencies that were formed specifically to meet the needs of human service agencies.

**Special Transit and Seniors' Resource Center – Denver, CO** - Several agencies are involved with the human-service transportation network in the Denver-Boulder metropolitan area. This includes organizations that focus on transportation and those with a human-service mission. A framework of a county-based broker system was established several years ago to address specialized transportation needs. Special Transit is the broker for Boulder County and Seniors' Resource Center is the broker for Jefferson County.

Both organizations have been quite successful. They have worked collaboratively with other organizations and public agencies to increase the cost-effectiveness of their operations and identify new funding sources for transportation services. Both agencies report that they follow all leads for opportunities to work with other agencies and taking an active role in the community. It is common at Special Transit for Board members to sit on other Boards, or for Special Transit to solicit Board members from elected officials or from other non-profit boards. Seniors' Resource groups work with the local agencies serving people with developmental disabilities.

Both Special Transit and Seniors' Resource Center actively worked to identify the true cost of transportation and explain to governmental jurisdictions and human service agencies what the cost of service is and how it is valuable to the communities or programs. Both have a solid base of support from the communities they serve (although it varies by community) and have been reasonably successful at increasing the proportion of the trip costs that are paid for by human service programs. Riders and board members have been actively involved in sharing their stories of how the service benefits them. Presentations are made to community groups, and some tools (slide shows, brochures) have been developed to assist in this. Both agencies have focused on how they increase mobility of riders, actively looking for ways to contract for service if others can provide it less expensively. They have started mileage reimbursement programs (to reduce costs for family or friends to transport riders), broker trips to taxis, and done travel training to transfer riders to less expensive modes of transportation.

Both agencies have pursued contracts for service in which they make a profit. The best example of this is competing with the private for-profit transportation providers to operate portions of the RTD paratransit service. Special Transit has had the contract for RTD paratransit service in Boulder County for several years; both agencies plan to bid in the 2007 procurement for these services.

**ACCESS - Pittsburgh, PA** - Pittsburgh's ACCESS program is one of the longest-running public paratransit programs in the country. Since it was established as a brokerage 1979, ACCESS has provided paratransit, shared-ride, and door-to-door transportation to residents of Allegheny County. ACCESS is open to the general public, but most passengers are either seniors or persons with disabilities. Nearly all of the human service agencies in Allegheny County now purchase transportation through ACCESS. Trips are provided through contracts with a variety of for-profit and nonprofit authorized carriers chosen through a competitive bidding process. Three nonprofit and seven for-profit carriers currently contract with ACCESS.

As the best practices examples above show, there are different ways that transit agencies and human service organizations can work together in a mobility management framework. The benefits of coordination and the potential obstacles to implementation for each of the three organizational structures are presented in Chapter VI.



## **Strategies for Centralized Communication One Number Access - Information – Trip Scheduling**

Getting a ride to meet a travel need should be the same for everyone, a phone call or a mouse click away. Information and scheduling should be centralized either with an existing service, such as 211 or with a newly developed service.

Anyone should be able to make one contact (phone or computer) and know how and with whom they can make a trip, at what cost, and have the trip scheduled and confirmed before the contact is completed.

This area is a first order strategy because it deals with the fundamental issue of providing usable information to the target population (customers) and providing clear and straight-forward access to transportation services. As noted earlier, information is the key to people using transportation services effectively, both knowing what services are available and having the information they need to make their use of a particular service successful.

There are three strategies ranging from low tech to high tech. At the lower end of the scale, a county or region may simply develop a Transportation Resource Directory. Or, telephone reference services may also be provided directly as customers or clients call for information. Typically, this telephone service is for information and referral only. The highest order alternative would be what is more and more being called a "One Number Access" service. With "One Number Access" a customer or client calls a central number, is able to receive the information one needs on available services and is then put in touch with a transportation provider that is able to provide the desired transportation to meet the need. In a fully developed and integrated system, the customer or client need make only one phone call.

The Transportation Resource Directory is a document which may be available at a web site or only in hard copy, containing readily accessible and usable information on the transportation services that are available to the target populations. The information usually includes the contact number for the transportation providers, eligibility criteria, service area and hours of service. It is critical that the information in the directory be kept up-to-date with regularly scheduled follow-ups with each provider. Using the directory, any individual or their representative can quickly identify which providers service their area and can contact the provider directly to arrange for a ride. For a best practices example of a Transportation Resource Directory see the one developed for DuPage County at: [http://www.dupageco.org/humanservices/generic.cfm?doc\\_id=481](http://www.dupageco.org/humanservices/generic.cfm?doc_id=481)

The high technology approach combines one number access and the extensive use of technology in transportation operations and administration. In Portage County, Ohio, as

an example, the Portage Area Regional Transportation Authority is planning and designing a The Travel Management Coordination Center for Portage and Geauga counties. This represents a high tech approach to the provision of “One Number Access” for information on and the scheduling of transportation services. PARTA has received demonstration funding to develop a Travel Management Coordination Center (TMCC) as a state-of-the-art, centralized call center that serves as a convenient access point for all consumers who require transportation, trip planning, real-time traveler information, and automatic trip reservations. The concept calls for use of the most up-to-date ITS technology which includes interactive voice response (IVR), trip requests via the internet, and online trip planning.

Depending upon the amount of transportation information that is available through the TMCC, the successful implementation of this project (which is dependent upon future federal funding) would represent the “highest tech” version of centralized information and “One Number Access”.

## **SERVICE DELIVERY STRATEGIES**

These transportation coordination strategies are where the “rubber meets the road”. They are often referred to as Second Order strategies meaning that they are usually implemented under the umbrella of an organized mobility management system. They are not necessarily mutually exclusive. They may be pursued in parallel with one another, or they may be implemented together. However, it is usually advisable that these alternatives be pursued once organization for mobility management is in place.

### ***Technology Development Strategies***

Technology development strategies focus on taking maximum advantage of technology to move mobility management forward. The following provides a brief overview of the technology that is available to help transit agencies and human service agencies as they move forward on mobility management.

The basic technologies that are important to the proper functioning of a coordinated system include:

- Automatic Vehicle Location – allows for accurate information about the specific location of the vehicle at a particular point in time, e.g., when a customer boards the vehicle

- Computer-Aided Dispatch – used to assist in dispatching vehicles and is typically integrated with AVL and other information management technologies, such as scheduling and routing software
- Mobile Data Terminals/Mobile Data Computers – a small on-board computer and interface that links the driver to an agency's computer network through wireless communications
- Coordination and Integration Software – technology that helps agencies with scheduling, routing, billing and reporting. Typical applications include coordinating paratransit routes and schedules within a single agency or among multiple agencies, and coordinating billing among multiple agencies.

### Tools that Improve Productivity

Tools that improve productivity use new software to improve paratransit service scheduling and service delivery. This includes state-of-the-art trip reservation and scheduling systems and recently developed software that can be used to optimize the mix of dedicated and non-dedicated (typically taxis) vehicles to achieve the lowest cost per trip. The efficiency gains can be used to expand the services provided to meet the highest priority needs of the target population.

Some of the key features of new paratransit scheduling software that help to support coordination include:

- The capability to schedule two distinct services (ADA/human services paratransit and a general public demand-response service) with the same software, and to generate separate reports on each service.
- Budget management features for various human services funding agencies paying for client trips on the paratransit service (i.e. estimated cost of the trip being scheduled is subtracted from the funding agency's budget so that schedulers can manage expenditure). This includes the ability to optimize use of funding agencies' allocated service hours per day by selecting the least expensive way of serving trip requests (through shared rides, for example).

### Automatic Vehicle Location and Mobile Data Terminals

Automatic vehicle location systems and mobile data terminals have become an accepted part of paratransit operations in the United States. It is estimated that the majority of large and medium sized agencies either have this equipment or are planning to purchase it. This technology is an essential part of making the best use of the new paratransit scheduling software features described above. This includes real-time database updating as well.

MDTs are used to transmit messages and information to drivers, to make schedule changes, and for drivers to transmit information, including time of arrival at pick-up and drop-off locations and requests to approve no-shows.

AVL is used in paratransit service as a dispatching aid on an exception basis, for example to help identify a vehicle that can accommodate a new trip, another vehicle that is running behind schedule, to assist lost drivers, to verify that a driver requesting a no-show is in the correct location, and similar functions. In some systems, AVL is also used to help identify vehicles that are in danger of falling behind schedule and as a tool to verify on-time performance as signaled by drivers using MDTs.

Automated scheduling and dispatching software for door to door transportation services is important. These systems typically provide the following functionality:

- Client database management such as keeping track of multiple addresses, special service requirements, eligibility status, funding sources, payment options and other important information specific to each customer.
- Customer service representatives can take casual and subscription bookings and maintain complete records of previous trips.
- Individual trips can be scheduled in real time, while a client is on the phone.
- Batch scheduling, optimizing schedules based on pre-defined cost and service quality parameters.
- Dispatchers can monitor all events and schedule changes that occur on the day of service and assign or reassign vehicles and drivers as required.

### *The Trip Sharing and Vehicle Sharing Strategies*

Trip sharing and vehicle sharing offers opportunities to make more effective and efficient use of transportation capabilities in the region, increase trip-making, save money, and reduce duplication of services in geographic areas within the region.

Trip sharing refers to the commingling of public and human service agency clients on a vehicle. This is a common practice in most coordinated systems which will lead to a higher productivity and a lower cost per trip.

Vehicle sharing or the joint use of vehicles can affect total fleet requirements. Joint use of vehicles should be considered separately from the concept of trip sharing where two or more agencies agree that their customers can ride on any of their vehicles based on scheduling and routing efficiency.

### **Overview of National Best Practices - Vehicle Sharing.**

**DARTS, Dakota Area Resources and Transportation Services** - DARTS, in West Saint Paul, Minnesota, is a private, non-profit human service agency with 37 vehicles. DARTS shares the operation of a Section 5310 vehicle with the City of Farmington Senior Center and St. Michael's Church. DARTS applied for the 5310 vehicle, paid the local match, and pays insurance and maintenance costs. DARTS operates the vehicle Monday through Thursday. The City of Farmington Senior Center operates the vehicle on Fridays and for special after hours and weekend events, providing the driver and paying for fuel and a maintenance and insurance fee. St. Michael's Church operates the vehicle on weekends using volunteer drivers; they pay for the fuel. All drivers operating the vehicle must complete DARTS drivers' training program and be certified by DARTS.

### ***Non-Dedicated Vehicle Strategies***

A recently completed Transit Cooperative Research Program project, *Optimal Split of Dedicated and Non-Dedicated Service for Demand-Responsive Paratransit*, explored the potential use of non-dedicated vehicles, such as taxis, as part of the service mix for a paratransit operation, and the potential for offering the opportunity for substantial savings in the cost of transportation service.

Before proceeding, it is appropriate to first define what is commonly understood as *dedicated service* and *non-dedicated service*. These definitions are provided below.

- **Dedicated Service** -- This is an operation where the vehicles are dedicated to exclusively the transportation of customers of a transportation program (or coordinated set of programs) during a specified period of time. The trips scheduled or dispatched to dedicated paratransit vehicles are typically controlled by one entity – either the responsible organization, its call center or broker contractor, or its operations contractor (for that system or a specific service area).
- **Non-Dedicated Service** -- This is an operation where the vehicles used to provide paratransit service do not exclusively provide transportation for the customers of a particular transportation program (or coordinated set of programs); hence, these vehicles are also used to transport other passengers. The most common example is a taxicab operation that can be called upon to serve a particular trip or a set of trips from a transportation program, but is otherwise free to serve general public trips (dispatched from the base office or flagged from the street) or trips from another contract.



One of the products of the TCRP B-30 project is a spreadsheet-based computer model that is intended to assist in answering a number of questions regarding the use of non-dedicated vehicles in a paratransit service delivery system, such as:

1. Is it cost-effective to use non-dedicated vehicles as part of the service delivery system?
2. What roles are most appropriate for Non-Dedicated Vehicles?
  - Peak service augmentation to level out the dedicated vehicle run structure
  - Handling longer trips that would otherwise reduce the productivity of dedicated vehicle operations
  - Providing service during evenings and other low demand periods
3. Given the dedicated vehicle cost and operating environment, and estimates of the cost and availability of Non-Dedicated Vehicle service, a key question is the optimal split of trips assigned to Dedicated and Non-Dedicated Vehicles. In other words, what "service mix" results in minimizing the overall cost per trip?

### **Overview of National Best Practices**

The following best practice illustrates the benefits of using on-Dedicated Vehicles in a specialized transportation services operation in Arlington County, VA. The service, STAR, is operated by the Arlington County Department of Transportation.

Arlington County is located across the Potomac River from Washington DC. At the urging of its ADA paratransit-eligible residents, Arlington County in 1999 set up a service, called STAR, to provide these residents with a non-ADA alternative to the Washington Metropolitan Area Transit Authority's MetroAccess ADA paratransit service. To be eligible for STAR, a person must be a resident of Arlington County, and have already been certified as ADA paratransit eligible by MetroAccess. Reservations are taken by the County's call center contractor, and are either scheduled onto 10 dedicated vehicles operated by two contractors (Diamond – 6 vehicles, and Answers, Inc – 6 vehicles), or assigned to Red Top Taxi for dispatching onto non-dedicated taxicabs (including regular and accessible taxicabs).

One of the interesting aspects of this program is that most trips are served by Red Top Taxi. For example, of the 108,809 trips in FY 05 (Jul-Jun), 82,750 trips (including 66,659 ambulatory trips and 16,091 wheelchair trips) or 76% of all trips were assigned to the non-dedicated service provider. This is the highest percentage of non-dedicated trips among all of the case studies, and they were all carried by a taxi operator. In Arlington County, Red Top had the resources to accommodate this volume of trips with 20 accessible taxis and 304 regular taxis (sedans). They also continue to invest in additional regular and accessible resources to match the growing demand. Moreover, Red Top's management believes in providing nothing less than highly-trained drivers.

The County achieves a considerable cost savings due to a service mix with a high percentage of non-dedicated trips carried by Red Top, since their cost per trip in FY 2005 (\$20.50) was 37% less than Diamond (\$32.46) and 21% lower than Answers (\$25.96). It should also be noted that Red Top, with their 20 accessible taxis, transported 74% of all wheelchair trips during FY 2005, virtually the same percentage as the overall rate for all trips.

## *Service Delivery Function Strategies*

Service delivery function strategies represent all functional areas where collaboration among agencies can achieve improvements in efficiency and effectiveness.

This alternative includes all of the functional areas associated with transportation service delivery – administration, operations and maintenance. For the most part, coordination of operations will be an integral part of the earlier strategies including new paratransit scheduling software and trip sharing – vehicle sharing. Collaboration among agencies in the areas of administration and maintenance are encouraged to create cost-efficiencies by sharing services, purchasing power and administrative resources. Two of the areas are:

- Joint Purchasing
- Sharing Resources

### **Joint purchasing**

Joint purchasing focuses on coordinating functions commonly undertaken by multiple organizations as a way to achieve greater cost efficiency and eliminate redundant activities. Community transportation operators, for example, could consolidate vehicle maintenance, purchase of insurance, driver training, and substance abuse testing. Through group-purchasing of common products or services, participating entities may increase purchasing power, and receive preferential service and prices.

### **Sharing resources**

Sharing resources involves the shared purchase and/or use of resources such as vehicles and facilities; support services such as software, driver training, drug testing, program management; and policies, procedures, and implementation plans.

### **Overview of National Best Practices**

**Maintenance - DARTS** in Dakota County, Minnesota maintains vehicles for 80-90 organizations. DARTS recognized the need for reasonably priced, high quality maintenance services and in an effort to offset internal maintenance costs, successfully marketed maintenance services to other providers.

**Fuel - The Kanawha Valley Regional Transit Authority (KRT)** in Charleston, West Virginia implemented a bulk purchase fuel program that allowed tax exempt public and non-profit entities receiving FTA funds to purchase lower cost fuel from KRT. KRT administers the program for qualified eligible recipients.

**Insurance** - In Washington State, the Non-Profit Insurance Program (NPIP) 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.

**Computer Hardware and Software – DARTS**, discussed above under Maintenance, orchestrated the joint purchase of Trapeze paratransit software upgrades and new hardware for several of its counterpart county-based providers serving other suburban counties in the Twin Cities area. DARTS allows other community transportation service providers to use its paratransit scheduling software via a multiple-site license of Trapeze PASS. One organization, The Elder Ride, accepted DARTS' offer and now rents Trapeze PASS from DARTS.

### ***Volunteer Driver and Escort Program Strategies***

Since operating costs associated with the driver of a vehicle can represent up to 70% or so of the total operating costs of transportation services, it is important to find low-cost services that can make a difference. Volunteer driver programs offer the opportunity to significantly reduce these costs. Volunteer driver programs typically provide mileage reimbursement to individuals who operate their own vehicles when transporting individuals to places they need to reach. Medical appointments are typically one of the priority trip purposes. Further, many times volunteer services focus on the travel needs of older persons more than other target populations. The benefit is that labor and capital costs are reduced.

Volunteer escort programs have volunteers accompanying riders to/from their destination on transit or paratransit service. Where escorts are helpful for older persons or persons with disabilities who are traveling, again, volunteer escorts can meet the need and save considerable costs.

Volunteer driver programs can be implemented at a variety of scales. While a countywide or regional program has significant benefits, such programs are also valuable when implemented by a single organization such as a church or agency or by a community.

### **Overview of National Best Practices**

Two volunteer driver and one escort programs are presented below:

- Enabling Transportation
- Ride Connection
- Shepherd Center Escort Transportation

**Ride Connection** in Portland, Oregon is probably the most extensive and fully-developed volunteer driver program in the country. Ride Connection is a non-profit, community service organization run for and by older adults that developed a volunteer driver program to meet the special needs of older adults. Ride Connection includes a network of over thirty agencies and over 370 volunteers providing in excess of 358,000 annual rides to 10,500 individuals, and is considered one of the best volunteer transportation services on the west coast.

**Enabling Transportation** in Mesa, Arizona was started to expand transportation alternatives for older adults in Mesa, Mesa Senior Services implemented a new program called *E.T. (Enabling Transportation)* in 2000. Modeled after a program developed in Riverside, California, ET is a mileage reimbursement program that enables older persons in Mesa to choose their own volunteer driver to provide them with transportation services and reimburse their volunteer driver with funding provided to them by the City of Mesa. Volunteer drivers are recruited directly by the participating resident and may be a neighbor or friend. Travel is reimbursed on a per mile of travel basis. The City of Mesa pays the participating resident and the resident pays the driver.

ET is available to Mesa residents who are 65 or more years of age. Eligible residents complete a program application and an agreement to participate in the program. By executing the agreement, residents agree to recruit their own volunteer driver, reimburse their volunteer driver for miles operated, keep and submit mileage reimbursement forms monthly, and abide by all ET program policies.

Residents are encouraged to ride with other ET residents. Drivers with multiple passengers may be reimbursed at higher rate per mile traveled.

**Shepherd Center Escort Transportation** in Kalamazoo, Michigan has operated since 1989. The Shepherd's Center in Kalamazoo, Michigan provides escort transportation service to senior citizens in their community. Escort transportation involves a volunteer driving an elderly person to a medical appointment, escorting them inside to their

doctor, waiting for them, and then bringing them home. The program began with a \$20,000 local grant, and 12 participating churches each providing five volunteers. Since then, the program has grown to 42 churches providing in kind and financial aid, and 120 volunteer drivers. Service is available Monday through Thursday, from 8:00am to 4:00pm. Shepherd's Escort Transportation provided 4,162 one way passenger trips to 258 clients in 2000. The program coordinates with the local paratransit system, senior centers, adult day care facilities, hospitals, and other organizations.

## ***Taxi Subsidy Program Strategies***

Taxi subsidy programs typically involve an arrangement between a sponsoring organization (or its agent) and a participating taxi company or companies. These programs accept and accommodate requests from sponsored customers, clients, or residents and/or accept vouchers provided by the sponsoring organization to riders as partial payment for the trip.

Most taxi subsidy programs focus on seniors and/or persons with disabilities residing within the sponsoring municipality (or agency service area), but some are available to general public residents as well. Human service agencies that employ this strategy generally limited taxi subsidies to agency clientele or program participants.

### **Overview of National Best Practices**

Two subsidized taxi fare programs are discussed below:

- DuPage County Pilot II subsidized Taxi Service
- Accessible Raleigh Transportation Program

**The DuPage County Pilot II Subsidized Taxi Service** is a nearly county-wide, user-side taxi subsidy program. Each sponsor defines its eligibility criteria and decides how much to charge for a voucher/coupon that is worth \$5.00 towards a taxi fare. Service is available 24 hours per day, 365 days per year anywhere in DuPage County. The Regional Transportation District (RTD) in Denver established the access-a-Cab service in response to a high denial rate on paratransit services and to reduce the per trip cost of its ADA paratransit service. Customers call RTD's ADA paratransit call center (managed by First Transit) to request an access-a-Cab trip. Trips cost a flat \$7.00 per trip.

**Accessible Raleigh Transportation Program**, Raleigh, North Carolina - The City of Raleigh provides three primary public transportation services: regular fixed-route bus service, parallel federally-mandated ADA service, and a supplemental dial-a-ride program that provides expanded ADA service throughout the city any time of day. The

two ADA services have been operating since 1990 and comprise the “Accessible Raleigh Transportation Program,” or “ART.” Both ADA services are provided by local taxis, at subsidized rates described in detail below

There are over 40 taxi companies in the City of Raleigh. A city ordinance was passed that requires all companies with six or more vehicles to participate in the program, to be eligible for a taxi license. The passenger fare for ADA service is \$1.50 and is paid with coupons purchased from the City (cash is not accepted). Taxi companies turn these coupons into the City to be reimbursed for the full cost of the ride (at their regular rates). Taxi’s record what the fare would be if it were a regular ride, and are paid the full amount by the City. Taxi fares are standardized and regulated by the City.

The Accessible Raleigh Transportation Program is the federally required ADA service that parallels fixed route service and is known as “Tier 2” ADA service. The supplemental ADA service is referred to as “Tier 1.” Tier 1 is, essentially, a subsidy for a ride via taxi. Instead of paying directly for a taxi with their own cash, patrons deemed eligible for ADA service can obtain scrip from the city to pay for their ride, receiving \$25 in value for \$12. There is no call broker – people call a taxi company directly, and taxis are available throughout the city, 24 hours a day, 7 days a week, 365 days a year. Taxi companies then turn in this scrip to the city for cash reimbursement (for the full unsubsidized cost of the ride). Eligibility requirements are the same for Tier 1 and Tier 2.

### *Private Vehicle Strategies*

With the reform of public assistance programs for low income families in the late 1990s, attention has been focused on the importance of reliable transportation so that low income individuals may get to job and other training programs and get to and from work reliably. In fact, for low income persons, ownership and operation of a private motor vehicle is, at best, very difficult and, at worst, not an option under normal circumstances. Recognizing the value of personal mobility and the reality that available transportation services are not always responsive to mobility needs, a number and variety of private vehicle programs have developed.

Private vehicle programs may involve elements of the following:

- Purchase of a vehicle
- One-time repairs on major mechanical components of a vehicle
- Maintenance programs to maintain vehicle reliability
- Loans for the purchase of a vehicle and associated training in family finances



## **Overview of National Best Practices**

**Wheels to Work** is a program of Rockingham Community Action and Good News Garage in New Hampshire. Lack of dependable transportation presents a significant barrier to consistent employment for many low-income workers. Wheels to Work, a joint venture of Rockingham Community Action and Good News Garage, New Hampshire, provides low-income families with dependable transportation at affordable terms. The program offers tax credits to companies that support the program and car loan recipients receive budget and car maintenance training.

The mission of Wheels to Work (W2W) is to promote self-reliance and the development of a productive workforce in New Hampshire by providing low-income workers who lack reliable transportation with dependable cars at affordable terms.

Car ownership programs for low-income workers have been developed in a number of other states. But New Hampshire has the unique advantage of offering tax credits to companies that support Wheels to Work. The tax credits, which are authorized by the New Hampshire Community Development Finance Authority, may be applied against one or more of the following state business taxes: Business Enterprise Tax, Business Profits Tax, and Insurance Premium Tax.

With Wheels to Work, the tax credits apply in two ways:

- Car dealers donating cars to the program receive state business tax credits equal to 75 percent of the trade-in value of the vehicle.
- Companies providing financial support receive state business tax credits equal to 75 percent of the contribution.

Most Welfare to Work participants who qualify for a small loan receive an education on having a car loan and the importance of having good credit and paying bills on time. Rockingham Community Action (the program sponsor) oversees the loans on the vehicles as second lien holder on the title in the state of New Hampshire next to the financial institution. W2W is also listed as additional insured or lost payee on the insurance policy for the participant so they receive regular updates on coverage and payments.

**Good News Garage** - Good News Garage's mission is to provide low-income working individuals with affordable-reliable transportation. The program started in New Hampshire in 1996 and has since expanded to Vermont, Connecticut and Massachusetts. Good News Garage inspects and repairs donated cars, trucks and vans. The vehicles are then provided to low-income individuals or families. Those donated cars that are not a good fit for a low-income family go to auction.

Good News Garage offers the opportunity for a higher tax deduction than most other car charities. This is because Good News Garage provides these donated cars, trucks and vans to low-income families. When this happens the car donor may deduct the 'fair market' value. Most other organizations that take car donation sell all the cars at auction. If your donated car is sold at auction the car donor receives what the car sell for. The 'fair market' value is usually higher.

Good News Garage estimates that it has transformed the lives of more than 2,000 families and individuals for whom the lack of transportation was a barrier to economic independence.

# VIII

## TRANSPORTATION COORDINATION PLAN

The plan for coordinating public transit and human services transportation in the Toledo region is presented below. First, recommendations for the organization, management and information services are presented. These are followed by recommendations for the collaborative delivery of specific transportation services.

The following presents a list of the actions that are recommended for the coordination of public transit and human services transportation and mobility management:

- [Recommended Action #1 - CREATE A REGIONAL MOBILITY MANAGEMENT SYSTEM](#) That Shifts The Central Focus Of Transportation Services From Operations To Meeting Customer Needs
- [Recommended Action #2 – ORGANIZE AND SUSTAIN A SUSTAINABLE MOBILITY MANAGEMENT ORGANIZATION](#) That Achieves Full Implementation Of Mobility Management And Transportation Coordination Capability And Potential
- [Recommended Action #3 - CENTRALIZE INFORMATION TO PROVIDE A SINGLE POINT OF ACCESS](#) For People With Mobility Needs To Access Transportation Services In The Region
- [Recommended Action #4 - INVEST IN TECHNOLOGICAL RESOURCES AND CAPABILITIES](#) To Achieve Maximum Cost-Effectiveness Of Mobility Management Services
- [Recommended Action #5 - IMPROVE SPECIFIC SEGMENTS OF TRANSPORTATION SERVICE ORGANIZATION, OPERATION AND DELIVERY](#) In A Timely Manner as Funding is Available and Mobility Management Partners are Able to put Agreements into Place
- [Recommended Action #6 – MAINTAIN AND EXPAND THE LEVEL AND COVERAGE OF PUBLIC TRANSPORTATION SERVICES](#) To Ensure That Toledo region Has Strong Public Transportation Services That Form The Base Upon Which Coordinated Transportation Services Are Built

- [Recommended Action #7 – ENSURE THAT THE CONTINUITY AND GROWTH OF EXISTING SECTION 5310 – ELDERLY AND INDIVIDUALS WITH DISABILITIES IS MAINTAINED](#) So That Services And Capital Needs, Consistent With The Coordination Plan, Are Not Interrupted, Especially Where Coordinated Service Delivery Is Already In Place
- [Recommended Action #8 – ENSURE THAT NEW SECTION 5316 AND 5317 PROJECTS EXPAND CURRENT TRANSPORTATION SERVICES](#) Expands The Mobility Of People With Disabilities And People In Low Income Families
- [Recommended Action #9 - MONITOR PROGRESS AND PERSEVERE IN THE FACE OF OBSTACLES AND DISAPPOINTMENTS](#) To Give Mobility Management And Transportation Coordination Full Opportunity To Develop And Transform Community Transportation Services In the Toledo Region

**RECOMMENDED ACTION #1 - CREATE A REGIONAL MOBILITY MANAGEMENT SYSTEM** That Shifts The Central Focus Of Transportation Services From Operations To Meeting Customer Needs

**The focus of meeting the mobility needs of people in the Toledo region should shift from a system of decentralized transportation service providers to a centralized mobility management system of collaborating agencies focused on meeting the mobility needs of people.**

The mobility needs of people in the region should be met by a centralized mobility management system that focuses on the needs of customers first rather than the operation of individual transportation service providers.

- The Toledo region should shift the focus of transportation services from operating services to meeting customer needs.
- The culture and approach to transportation service delivery needs to change, from single agency to collaborative multi-agency delivery
- TARTA and TMACOG should be the key leaders in this movement; in fact, they should be the driving force.
- The region will look to TARTA, especially as the provider of public transportation services, for leadership, direction and change.

**A countywide leadership structure and organization should be created to implement the shift from transportation operations to mobility management.**

- The community needs leadership – from TARTA, TMACOG and other key human service agencies in the region
- TARTA is the single largest agency in the Toledo region whose mission is meeting mobility needs.
- The structure and organization can develop incrementally.
- Coordination actions can proceed at two levels
  - The broad organizational change and actions required
  - Incremental changes in service delivery by agencies beginning to collaborate on specific actions that are logically part of a larger whole

**Development of the leadership structure and organization will require incremental actions, time and resources to support its development. The incremental development, organizationally, should include**

- Creation of a Transportation Coordination Leadership Council of agencies with significant investments in transportation.
- Membership on the Transportation Coordination Leadership Council should be invited and require a Memorandum of Understanding among the members
- Formal recognition of TARTA as the lead organization for mobility management and transportation coordination in the Toledo region charged with responsibility of managing and coordinating the delivery of transportation services.
- The transition to mobility management should occur incrementally
  - To provide the central point of access to services, broker the trips among participating transportation providers and provide a trip reservation to the customer
  - To selectively consolidate the delivery of transportation services among fewer transportation providers, taking advantage of the desire of some agencies to get out of the business of transportation
  - To sustain a mobility management agency that integrates the diverse activities associated with the cost-effective and cost-efficient delivery of coordinated transportation services

**RECOMMENDED ACTION #2 – ORGANIZE AND SUSTAIN A PERMANENT MOBILITY MANAGEMENT ORGANIZATION** That Achieves Full Implementation Of Mobility Management And Transportation Coordination Capability And Potential

The mobility management organization should focus on the following functional activities, consistent with stakeholder consensus:

- **Coordinate Administrative and Operational Transportation Functions**
  - Selected functions in the delivery of transportation services would be improved by taking advantage of resources and capabilities that may be common among the providers.
  - These common functions could include vehicle fueling; vehicle maintenance; driver training; scheduling of trips and assignment of vehicles among participating transportation providers; tracking and reporting of operations; financial tracking, billing and payment.
  
- **Central Trip Planner and Trip Broker**
  - The delivery of transportation services would continue to be provided by separate transportation providers. However, a transportation broker would exist to coordinate the delivery of transportation services among participating providers and purchasers.
  - Providers would use the broker to provide selected client trips for other providers and/or use the broker to find providers that would provide a trip for one of their clients.
  
- **Central Information Source**
  - To improve access to diverse and separately-operated transportation services, people needing transportation services would be able to contact a single source, via telephone or computer, to find out how they may get a ride to meet a specific transportation need.
  - Information on transportation services that may be available to them would be provided so they could make contacts to see if they could get a ride.

Additional activities should be pursued as opportunities present themselves and resources are available. These would include:

- **Add New Services**
  - Transportation services that are not currently being offered would be introduced. These could include services that fill gaps in existing services; introduce a new type of service not currently available; services that would meet a need without providing transportation, such as package delivery.
  
- **Consolidation of All Transportation Services**
  - The delivery and management of all transportation services and associated functions would be organized within one organization or agency.
  - Agencies formerly providing direct services would contract with this agency for their transportation needs.



- Agencies that formerly purchased transportation services from one or more providers would purchase their transportation through this agency.

While consolidation of transportation services is an extremely low priority among stakeholders, opportunities may arise as some agencies with an investment in transportation services decide they would rather rely on a central mobility manager instead.

An organizational structure that includes the following areas is recommended:

- Customer Services – Information and registration, Trip reservations, Travel mobility planning and training
- Transportation Services – Trip brokering, Vehicle scheduling, Service management, tracking and monitoring
- Planning and development – Evaluation and reporting, Contracts
- Budget and finance – Budgets and finance, Fiscal management

As the central mobility manager, TARTA's management structure should grow and evolve as mobility management responsibilities are formalized and implemented.

**RECOMMENDED ACTION #3 - CENTRALIZE INFORMATION TO PROVIDE A SINGLE POINT OF ACCESS** For People With Mobility Needs To Access Transportation Services In The Region

**This system would centralize information on available transportation services and put people with needs in direct contact with the transportation provider(s) best able to meet a specific mobility need.**

**The system should integrate information and referral, trip reservations and trip scheduling so that when a person is done, they have their ride arranged.**

- Getting a ride to meet a travel need should be the same for everyone, via a single telephone call or through access to a single web site.
- Information and scheduling should be centralized logically with TARTA working in partnership with other stakeholders, resulting in enhancements and/or expansions of existing information and referral services.

- Anyone in the Toledo region should be able to make one contact (phone or computer) and know how and with whom they can make a trip, at what cost, and have the trip scheduled and confirmed before the contact is completed.
- TARTA should work collaboratively with the information and referral service in the Toledo region and other human service agencies to move toward the integration of information and referral functions with trip scheduling among multiple agencies and transportation providers.

Since mobility management is an eligible activity in the Sections 5310 – Elderly and Disabled, 5316 – Job Access and Reverse Commute and 5317 – New Freedom programs, TARTA should work collaboratively, including key human service agency partners in the implementation of mobility management, using multiple funding sources to achieve this.

An additional source of funding that should be considered seriously is the Ohio Department of Transportation’s Ohio Coordination Program. Financial resources from the human services community should be brought to the table as well, for two purposes at least: 1) for matching funds for federal and state funding and 2) to bring sufficient resources together to be effective in establishing and stabilizing the mobility management system.

Technology development should be closely coordinated with existing information and referral capabilities, so that there would be a seamless integration, migration and expansion of information and referral to a robust one-stop center for access to multi-agency delivery of transportation services.

## **RECOMMENDED ACTION #4 - INVEST IN TECHNOLOGICAL RESOURCES AND CAPABILITIES To Achieve Maximum Cost-Effectiveness Of Mobility Management Services**

The following technologies should form the core technologies that support the proper functioning of a coordinated system:

- Automatic Vehicle Location – accurate information about the specific location of vehicles at particular points in time
- Computer-Aided Dispatch – assistance in dispatching vehicles, integrated with AVL and other information management technologies, such as scheduling and routing software

- Mobile Data Terminals/Mobile Data Computers – small on-board computer and interface that links the driver to an agency's computer network through wireless communications
- Coordination and Integration Software – technology that supports agency scheduling, routing, billing and reporting in a multiple agency environment.

These technologies should be developed with cross-agency capabilities so that multiple agencies are able to benefit from technologies in a coordinated environment.

**RECOMMENDED ACTION #5 - IMPROVE SPECIFIC SEGMENTS OF TRANSPORTATION SERVICE ORGANIZATION, OPERATION AND DELIVERY** In A Timely Manner as Funding is Available and Mobility Management Partners are Able to put Agreements into Place

It is important to remember that the core transportation services provided by public transportation systems, namely DATA, should be at the center of mobility management and coordinated transportation service delivery. Strategies for specific actions to deliver coordinated transportation services should include:

- **Maintaining and improving public transportation services and access** to these services to maximize the responsiveness and value to older persons and persons with disabilities
- **Maintaining and improving public transportation services to maximize responsiveness and value** to persons with low income who need to reach employers that are located in areas not easily reachable with fixed route services
- **Trip sharing – Vehicle Sharing**
  - Make the best use of collaborative multi-agency transportation capabilities in the region, to increase trip-making, save money and reduce duplication
- **Maximizing Value of Non-Dedicated Vehicles**
  - Collaboration means finding ways that vehicles in service to a specific client group only can be used for other clients as well. Private sector resources such as taxi services can fill key gaps in services.
- **Service Delivery Functions – Administration – Operations – Maintenance – Trip Scheduling and Vehicle dispatching**
  - These are all functional areas where collaboration among agencies can achieve improvements in efficiency and effectiveness.

- **Volunteer Driver and Escort Programs**
  - It is important to find low-cost services that can make a difference.
- **Taxi Fare Subsidy Programs**
  - Taxi service in the Toledo region can play a key role in meeting mobility needs and provides a level of flexible capability that TARTA and human service agencies cannot easily provide.
- **Private Vehicle Programs**
  - Private vehicle programs may fill voids in transportation service coverage where transportation services would not be cost effective. Care must be taken that these programs include all elements of vehicle ownership, operation and maintenance.
- **Capital Development Programs**
  - Capital programs, especially the purchase of new or replacement vehicles, should be targeted to fill voids in transportation service coverage where transportation services would not be cost effective. Opportunities for multiple agency projects should be encouraged and accorded high priority.
  - Capital development programs that provide the infrastructure and equipment necessary to improve and strengthen coordinated public transportation and human services transportation programs

**Consistent with priorities established through community outreach, specific improvements should include:**

- Cooperative trip sharing across agencies providing transportation services
- Sharing of vehicle and service resources across agency programs
- Joint purchasing agreements for vehicles, fuel and other materials and supplies
- Training programs for customer service, vehicle operations and safety, administration of drug and alcohol programs
- Introduction of selected new services, especially to fulfill unmet needs and reduce gaps in current transportation services
- Consolidation of administrative and operational functions as agencies decide to purchase rather than operate transportation services
- Development and enhancement of existing travel and mobility training programs for customers with disabilities who may safely use fixed route public transportation services
- Mobility planning programs, especially for older persons, to ensure that people are able to take maximum advantage of community transportation services to maintain their mobility and quality of life

Stakeholders should focus attention on inter - agency projects that strengthen and expand mobility management and the coordination of transportation services, minimizing the overlap in services, reducing the duplication of services and focusing new or expanded services on filling gaps that public transportation services may not be able to address.

Use of the Federal Transit Administration's 5320, 5316 and 5317 programs should be maximized to fill gaps in services, reduce overlap and meet critical unmet transportation needs.

In the process of selecting projects for funding, priority should be given to those projects which offer the greatest impact in moving mobility management forward. Care should also be taken to fit project initiatives to addressing the most significant unmet transportation needs, gaps in services and overlaps in services that have been identified.

**RECOMMENDED ACTION #6 – MAINTAIN AND EXPAND THE LEVEL AND COVERAGE OF PUBLIC TRANSPORTATION SERVICES** To Ensure That The Region Has A Strong Network of Public Transportation Services That forms the Base Upon Which Coordinated Transportation Services are Built

- Maintain and increase the coverage of fixed route service as the Toledo region continues to develop and change
- .
- Maintain and increase demand-response services as the number of older persons and persons with disabilities continues to increase as the county develops and changes, especially with the aging of the population
- Address the need for a continuing, long-term local financial base for TARTA, including the option of a Lucas County sales tax that would replace current TARTA's property tax.

**RECOMMENDED ACTION #7 – ENSURE THAT THE CONTINUITY AND GROWTH OF EXISTING SECTION 5310 – ELDERLY AND INDIVIDUALS WITH DISABILITIES PROJECTS IS MAINTAINED** so that services and capital needs, consistent with the coordination plan, are not interrupted, especially where coordinated service delivery is already in place

- Section 5310 – High priority should be given to future projects that replace capital equipment and maintain and improve services supported with 5310 vehicles that fulfill unmet needs and fill gaps in transportation services.
- Section 5310 - Implementation of mobility management should receive high priority. In addition to mobility management, the following eligible projects should receive high priority:
  - Transit-related intelligent transportation system (ITS) improvements.
  - Capital expenses so that social service agencies can obtain vehicles to transport the elderly and disabled. Vehicle procurement for human/social service agencies has been the traditional criterion for this program. The vehicles are necessary to meet the unmet needs or gaps in service of the public transportation provider if there is one available in the area.

**RECOMMENDED ACTION #8 – *ENSURE THAT NEW SECTION 5316 AND 5317 PROJECTS SUPPORT AND EXPAND CURRENT TRANSPORTATION SERVICES* expands the mobility of people with disabilities and people in low income families**

- High priority should be given to projects that improve services and programs that support transportation services providing transportation access to jobs and job training services, through namely the competitive selection process managed through the Ohio Department of Transportation.
- High priority should be given to programs that serve people with disabilities beyond ADA minimum requirements where such services meet additional unmet needs.
- High priority should be given to capital projects that improve the physical environment that people with disabilities must navigate to effectively use fixed route bus services
- High priority should be given to projects that improve access to jobs in areas where there are gaps in transportation services.
- Implementation of mobility management should receive high priority.

**RECOMMENDED ACTION #9 - *MONITOR PROGRESS AND PERSEVERE IN THE FACE OF OBSTACLES AND DISAPPOINTMENTS* to give mobility management and transportation**



## coordination full opportunity to develop and transform community transportation services in the region

- Introducing mobility management and transportation coordination in a broad, regional manner will have its ups and downs and difficulties. Be prepared to respond proactively with an eye toward the long-term benefit of community transportation services rather letting difficulties stall or interrupt progress.
- For success long-term, the shorter-term obstacles, problems and unexpected setbacks should be accepted as the price of longer-term success.
- Progress and service delivery need to be monitored so that success and failure can be measured and evaluated and corrective actions can be taken. Clear measureable evaluation criteria needs to be developed across public transportation and human services transportation programs.

# IX

## PROGRAM PRIORITIES





### 5316 – JOB ACCESS AND REVERSE COMMUTE AND 5317 – NEW FREEDOM PROGRAMS

TARTA worked collaboratively with TMACOG’s Human Services Transportation Committee to review eligible project activities for both the 5316-Job Access and Reverse Commute and 5317 – New Freedom programs. Fact sheets for both the 5316 and 5317 programs are presented in Appendix III.

#### FOCUS OF THE ASSESSMENT

The priority setting was accomplished over a series of meetings using the United We Ride Framework for Action template.

The assessment provides a snapshot of the state of transportation coordination in the Toledo region at the time the assessment was completed. Each section of the assessment focuses on a different area of transportation coordination. Within each section, there are a number of factors that stakeholders are asked to rate according to the following scale:

<p><b><i>Progress Rating</i></b> (circle one rating that best describes your program)</p> <p> Needs to Begin    Needs Substantial Action    Needs Some Action    Done Well</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

#### Making Things Happen by Working Together

This section focuses on the manner and extent to which key individuals and organizations are catalysts for envisioning, organizing, and sustaining a coordinated transportation system that provides mobility and access to transportation for all. There are five factors that are rated.

#### Taking Stock of Community Needs and Moving Forward

This section focuses on the state of assessing the coordination of transportation services. This includes resources available, services provided, mobility needs of target populations, opportunities for improvement and the capacity of human service agencies to coordinate

transportation services. There are ten factors that are rated.

## Putting Customers First

This section focuses on customers, including people with disabilities, older adults, and low-income riders, the extent to which they have convenient and accessible means of accessing information about transportation services, and their involvement in the evaluation of services and identification of their mobility needs. There are five factors that are rated.

## Adapting Funding for Greater Mobility

This section focuses on the use of innovative procedures to support transportation services by combining various state, federal, and local funds, creating customer friendly payment systems while maintaining consistent reporting and accounting procedures across programs.

## Moving People Efficiently

This section focuses on the presence of multi-modal and multi-provider transportation networks that are seamless for the customer and also operationally and organizationally sound for the providers.

# RESULTS OF THE ASSESSMENT

## JOB ACCESS REVERSE COMMUTE PROGRAM

The results of the Framework for Action Community Assessment are presented below.

### Section 1 - Making Things Happen by Working Together

- Needs to Begin 20%
- Needs Significant Action 20%
- **Needs Action 40%**
- Done Well 20%

### Section 2 - Taking Stock of Community Needs and Moving Forward

- Needs to Begin 24%
- Needs Significant Action 25%
- **Needs Action 30%**
- Done Well 21%

### Section 3 - Putting Customers First

- Needs to Begin 8%
- **Needs Significant Action 37%**
- *Needs Action* 29%
- Done Well 26%

### Section 4 - Adapting Funding for Greater Mobility

- **Needs to Begin 79%**
- Needs Significant Action 0%
- Needs Action 14%
- Done Well 7%

### Section 5: Moving People Efficiently

- **Needs to Begin 50%**
- Needs Significant Action 7%
- Needs Action 25%
- Done Well 18%

The next step in the assessment was the consideration of priorities among eligible project activities with JARC funding.

Following a discussion of all project activities, HSTC members were asked to express their project priorities by voting on the alternatives. Of the eligible activities, the following were ranked in the top five:

1. Establishing regional mobility managers or transportation brokerage activities
2. Late-night and weekend service
3. Guaranteed ride home service
4. Expanding fixed-route public transit routes
5. Local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides

These five selected projects activities were discussed further in the "Action Planning for Priorities" phase of the Framework for Action. For JARC the priorities narrowed to the top 3 out of 15 eligible activities:

1. Late-night and weekend service
2. Guaranteed ride home service
3. Local car loan programs

## **NEW FREEDOM "Beyond the ADA" PROGRAM**

The results of the Framework for Action Community Assessment are presented below.

### Section 1 Making Things Happen by Working Together

- Needs to Begin 20%
- **Needs Significant Action 48%**
- Needs Action 25%
- Done Well 7%

### Section 2: Taking Stock of Community Needs and Moving Forward

- *Needs to Begin* 26%
- **Needs Significant Action 29%**
- *Needs Action* 25%
- Done Well 20%

### Section 3: Putting Customers First

- Needs to Begin 23%
- **Needs Significant Action 26%**
- **Needs Action 28%**
- Done Well 23%

### Section 4: Adapting Funding for Greater Mobility

- **Needs to Begin 69%**
- Needs Significant Action 6%
- Needs Action 19%
- Done Well 6%

### Section 5: Moving People Efficiently

- **Needs to Begin 66%**
- Needs Significant Action 16%
- Needs Action 12%
- Done Well 6%

The next step in the assessment was the consideration of priorities among eligible project activities with New Freedom funding.

Following a discussion of all project activities, HSTC members were asked to express their project priorities by voting on the alternatives. Of the eligible activities, the following were ranked in the top five:

1. Enhancing public transportation services beyond minimum requirements of the ADA
2. Feeder services
3. Travel training
4. Acquisition of intelligent transportation technologies

TARTA, TMACOG and the Human Service Transportation Committee will use these priorities in conducting the competitive selection of projects to be funded with the annual apportionment of funding for the

- 5316 – Job Access and Reverse Program
- 5317 – New Freedom Program

## **INTEGRATION OF UNMET NEEDS, GAPS AND OVERLAPS WITH STRATEGIES AND SOLUTIONS**

Figure 22 presents a chart that provides a picture of which strategies and solutions have general and specific impacts on the target populations of older persons, persons with disabilities and low income persons. The needs of the target populations are presented in the following categories:

- Unmet travel needs
- Gaps in transportation services
  - Days and hours
  - Service coverage
  - Other gaps
- Overlaps in transportation services

Strategies and solutions are organized in the following categories:

- First order mobility management actions
  - Public transportation services
    - Capacity increases
    - Increased days and hours of service
    - Extended service coverage
  - Second order mobility management actions
    - Trip sharing
    - Vehicle sharing
    - Non-dedicated vehicles
    - Service delivery functions
    - Volunteer driver and escort programs
    - Taxi subsidies
    - Private vehicle programs
    - Capital development

This matrix should be used to determine which actions may be responsive to needs, gaps and overlaps, how actions may be integrated together and which agencies and organizations should be collaborating on the implementation of certain actions.



Figure 16

UNMET NEEDS; GAPS IN SERVICE; OVERLAPS IN TRANSPORTATION SERVICES; AND STRATEGIES AND SOLUTIONS																
Transportation Coordination - Mobility Management Implementation Matrix																
UNMET NEEDS, GAPS IN SERVICE AND OVERLAPS IN SERVICE	STRATEGIES AND SOLUTIONS															
	First Order Mobility Management Actions				Public Transportation Services			Second Order Transportation Coordination Actions								
	Shift to Mobility Management	Mobility Management Agency	Information, Trip Brokering and Service Scheduling	Technology Development	Capacity Increase	Increase Days and Hours	Extended Coverage Area	Technology and Capital Development	Trip Sharing	Vehicle Sharing	Non-Dedicated Vehicles	Service Delivery Functions	Volunteer Driver/Escort Programs	Taxi Subsidies	Private Vehicle Programs	
<b>UNMET NEEDS</b>	X	X	X	X												
ED - Access to medical services					X	X	X		X	X	X		X	X	X	
ED - Basic mobility in support of quality of life					X	X	X		X	X	X		X	X	X	
LI - Access to medical care, including children					X	X			X		X		X	X	X	
LI - Job access generally, but especially to suburban areas beyond TARTA's service area					X	X	X		X		X			X	X	
LI - Mismatch of residence and location of jobs					X	X	X		X		X			X		
LI - Multiple stops on fixed route service, with childcare				X	X				X		X			X		
LI - ED - Access From Toledo to suburbs for medical care					X				X		X			X	X	
LI - ED - Access to jobs, especially with child care involved					X				X		X			X	X	
LI - ED - Travel assistance			X	X								X				
<b>GAPS IN TRANSPORTATION SERVICE</b>	X	X	X	X												
<b>Days and Hours of Service</b>	X	X	X	X												
LI - Weekend service levels, with fewer routes in service					X	X			X		X			X		
LI - Evening service - early evening and later evening, with TARTA's reduction in routes in service					X	X			X		X			X		
<b>Service Coverage</b>	X	X	X	X												
LI - Weekend service coverage, with fewer routes in service					X	X			X		X			X		
LI - ED - communities without senior transportation services, including Perrysburg							X	X	X		X		X	X		
LI - Evening service when TARTA reduces the number of routes in service							X	X	X		X		X	X		
<b>Other Gaps</b>	X	X	X	X												
Insufficient travel training capability			X									X				
Integration of information and referral services with trip planning and scheduling for access to transportation services			X					X								
Higher level of service in suburban and rural communities					X			X	X		X		X	X		
Integration of existing services with Medicaid/ MCP transportation services			X	X	X				X		X					
Access from rural communities and areas to county government services, including workforce development, especially in Mercer County					X	X			X		X		X	X		
<b>OVERLAPS IN TRANSPORTATION SERVICES</b>																
ED - TARTA TARPS service and Lucas County Mahoning MRDD transportation services	X	X	X	X				X	X		X					
ED - TARTA TARPS service and service funded by the Area Agency on Aging	X	X	X	X				X	X		X					
LI - ED - TARTA, human service agencies and private transportation services								X	X		X					
LI - ED - TARTA and Private Medicaid Managed Care Transportation services								X	X		X					

## **TIMELINE FOR MOVING MOBILITY MANAGEMENT FORWARD**

The timeline for implementing the Recommended Actions are presented in Figure 23. Key activities that are necessary under each Recommended Action are presented. The timeline is presented on a quarterly basis for 2008 and 2009 and annually for subsequent years. This timeline should be considered to be a flexible guide for moving forward. However, it is important for the timely progress in coordinating transportation services and managing mobility that work begin at the earliest convenience of strategic partners.

Figure 17

IMPLEMENTATION TIMELINE

TMACOG - TARTA COORDINATED PUBLIC TRANSIT - HUMAN SERVICES TRANSPORTATION PLAN

Implementation Activity	CALENDAR YEAR 2008				CALENDAR YEAR 2009				CALENDAR YEAR 2010	CALENDAR YEAR 2011	CALENDAR YEAR 2012
	First	Second	Third	Fourth	First	Second	Third	Fourth			
<b>Recommended Action #1 - CREATE A REGIONAL MOBILITY MANAGEMENT SYSTEM</b> That Shifts The Central Focus Of Transportation Services From Operations To Meeting Customer Needs											
Call meeting of potential public transit and human service agency partners		>>>>>>	>>>>>>	>>>>>>				>>>>>>	>>>>>>	>>>>>>	>>>>>>
Conduct sufficient meetings of Transportation Coordination Leadership Council to establish vision, mission, focus and leadership			>>>>>>	>>>>>>				>>>>>>	>>>>>>	>>>>>>	>>>>>>
Develop and execute memoranda of understanding among participating partners and communicate progress in moving forward with key stakeholders, community leaders and elected officials			>>>>>>	>>>>>>				>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #2 - ORGANIZE AND SUSTAIN A PERMANENT MOBILITY MANAGEMENT ORGANIZATION</b> That Achieves Full Implementation Of Mobility Management And Transportation Coordination Capability And Potential											
Conduct monthly meetings of Transportation Coordination Advisory Councils to maintain close communication with all potential coordination partners				>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Develop and execute memoranda of understanding among participating partners and communicate Based on memoranda of understanding, determine specific form of not-for-profit organization as independent or under the umbrella of a lead agency				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Conduct monthly meetings of Transportation Coordination Advisory Councils to maintain close communication with all potential coordination partners							>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Create mobility management agency, recruit and appoint board of directors							>>>>>>	>>>>>>	>>>>>>		
Confirm vision, mission and focus of new organization							>>>>>>	>>>>>>	>>>>>>		
Provide funding and staffing; legal services; etc.							>>>>>>	>>>>>>	>>>>>>		
Establish form and content for specific coordination services agreements for mobility management							>>>>>>	>>>>>>	>>>>>>		
Execute specific service agreements among participating agencies of interest											
<b>Recommended Action #3 - CENTRALIZE INFORMATION TO PROVIDE A SINGLE POINT OF ACCESS</b> For People With Mobility Needs To Access Transportation Services In The Region											
Determine and meet with agencies that have provide transportation information services				>>>>>>	>>>>>>						
Explore county-level and regional approaches							>>>>>>	>>>>>>			
Explore alternative approaches to centralization				>>>>>>	>>>>>>						
Implement and manage on an on-going basis							>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Determine potential sources of funding for implementation				>>>>>>	>>>>>>						
<b>Recommended Action #4 - INVEST IN TECHNOLOGICAL RESOURCES AND CAPABILITIES</b> To Achieve Maximum Cost-Effectiveness Of Mobility Management Services											
Review and determine key technologies that must be in place for effective mobility management among multiple partners				>>>>>>	>>>>>>						
Determine potential sources of funding for implementation							>>>>>>	>>>>>>			
Implement and manage on an on-going basis							>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #5 - IMPROVE SPECIFIC SEGMENTS OF TRANSPORTATION SERVICE ORGANIZATION, OPERATION AND DELIVERY</b> In A Timely Manner as Funding is Available and Mobility Management Partners are Able to put Agreements in Place											
Review and confirm specific implementation actions and priorities				>>>>>>	>>>>>>						
emerge					>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Develop and encourage implementation of high priority services							>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Execute implementation service agreements as required							>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #6 - MAINTAIN AND EXPAND THE LEVEL AND COVERAGE OF PUBLIC TRANSPORTATION SERVICES</b> To Ensure That The Region Has A Strong Network of Public Transportation Services That forms the Base Upon Which Coordinated Transportation Services are Built											
Use all available funding programs among public transit and human service agency partners to take maximum advantage of existing public transportation services, especially fixed-route services				>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Modify and expand fixed route public transportation services to the maximum extent feasible to address unmet needs and reduce gaps in transportation services	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #7 - ENSURE THAT THE CONTINUITY OF EXISTING SECTION 5310 ELDERLY AND DISABLED INDIVIDUALS AND 5316 JOB ACCESS AND REVERSE COMMUTE PROGRAM PROJECTS IS MAINTAINED</b> so that services and capital needs, consistent with the coordination plan, are not interrupted, especially where coordinated service delivery is already in place											
Assess all existing projects for consistency with vision, mission of and priorities for mobility management				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Invite collaborative implementation strategies and projects				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Support projects that strengthen and further mobility management				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #8 - ENSURE THAT NEW SECTION 5316 JOB ACCESS AND REVERSE COMMUTE AND SECTION 5317 NEW FREEDOM PROJECTS SUPPORT AND EXPAND CURRENT TRANSPORTATION SERVICES</b> , already in place, subject to consistency with the coordination plan, unmet needs and gaps in transportation services											
Assess all existing projects for consistency with vision, mission of and priorities for mobility management				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Invite collaborative implementation strategies and projects				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
Support projects that strengthen and further mobility management				>>>>>>	>>>>>>		>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>
<b>Recommended Action #9 - MONITOR PROGRESS AND PERSEVERE IN THE FACE OF OBSTACLES AND DISAPPOINTMENTS</b> To Give Mobility Management And Transportation Coordination Full Opportunity To Develop And Transform Community Transportation Services In the Toledo Region											
Establish evaluation standards and measurement criteria				>>>>>>	>>>>>>						
Develop and implement the mobility management evaluation program				>>>>>>	>>>>>>						
Report to mobility management partners and the community on a regular basis				>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>	>>>>>>

# APPENDICES

## **APPENDIX I**

### **Demographic Characteristics of the Older Adult Populations of Lucas, Wood and Ottawa Counties**

# FAST FACTS

ABOUT

## Lucas County and its 60+ Population



[WWW.SCRIPPS.MUOHIO.EDU](http://WWW.SCRIPPS.MUOHIO.EDU)

- Almost 17% of Lucas County's population is age 60+ (or 76,180 individuals)
- By 2020, there will be 97,000 individuals age 60+ in Lucas County (This is a 27% increase in the 60+ population)
- Nearly 3 in 4 individuals age 85+ are female
- Disability increases with age: Only 3% of 60-69 year olds have a severe disability, compared to 44% of those 90+
- Over one third of individuals age 60+ have at least one disability
- By 2020, almost 8,000 individuals age 60+ with a severe disability will reside in Lucas County
- Almost 13% of the age 60+ population live in poverty
- Almost 15% of individuals age 60+ are racial or ethnic minorities
- Of men age 60+, 71% are married, compared to only 41% of women
- Nearly 7 in 10 individuals age 60+ have 12 or fewer years of education
- Of women age 60+, 45% live alone, compared to 25% of men



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MIAMI  
UNIVERSITY  
OXFORD OHIO

Source: Scripps Gerontology Center, Miami University, Ohio.



# FAST FACTS

ABOUT  
Wood County  
and its 60+ Population



WWW.SCRIPPS.MUOHIO.EDU

- More than 14% of Wood County's population is age 60+ (or 17,463 individuals)
- By 2020, there will be 28,500 individuals age 60+ in Wood County (This is a 63% increase in the 60+ population)
- Nearly 3 in 4 individuals age 85+ are female
- Disability increases with age: Only 3% of 60-69 year olds have a severe disability, compared to 44% of those 90+
- Nearly one third of individuals age 60+ have at least one disability
- By 2020, almost 2,300 individuals age 60+ with a severe disability will reside in Wood County
- Over 10% of the age 60+ population live in poverty
- Less than 3% of individuals age 60+ are racial or ethnic minorities
- Of men age 60+, 80% are married, compared to only 51% of women
- More than 6 in 10 individuals age 60+ have 12 or fewer years of education
- Of women age 60+, 39% live alone, compared to 15% of men



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MIAMI  
UNIVERSITY  
OXFORD OHIO

Source: Scripps Gerontology Center, Miami University, Ohio.



# FAST FACTS

ABOUT

## Ottawa County and its 60+ Population



[WWW.SCRIPPS.MUOHIO.EDU](http://WWW.SCRIPPS.MUOHIO.EDU)

- Over 21% of Ottawa County's population is age 60+ (or 8,838 individuals)
- By 2020, there will be 13,300 individuals age 60+ in Ottawa County (This is a 50% increase in the 60+ population)
- Seven in 10 individuals age 85+ are female
- Disability increases with age: Only 3% of 60-69 year olds have a severe disability, compared to 44% of those 90+
- Over one third of individuals age 60+ have at least one disability
- By 2020, nearly 1,000 individuals age 60+ with a severe disability will reside in Ottawa County
- Over 11% of the age 60+ population live in poverty
- Only 3% of individuals age 60+ are racial or ethnic minorities
- Of men age 60+, 76% are married, compared to only 48% of women
- Nearly 3 in 4 individuals age 60+ have 12 or fewer years of education
- Of women age 60+, 40% live alone, compared to 20% of men



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Source: Scripps Gerontology Center, Miami University, Ohio.

## **APPENDIX II**

### **Force Field Analysis Charts**

**Results from the April 10, 2008 Workshop**

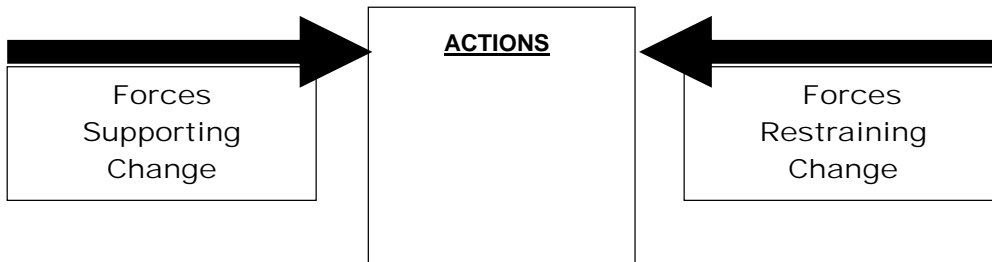
CONSIDERATION OF FORCES RELATED TO  
CHANGES AND ACTIONS FOR  
TRANSPORTATION COORDINATION STRATEGIES

# Force Field Analysis

Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>▪ What important problems does this solve?</li> <li>▪ What doesn't it solve?</li> <li>▪ What other existing processes and structures support this action?</li> <li>▪ Who could lead this exercise?</li> <li>▪ What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>▪ What would we give up or lose?</li> <li>▪ What forces, processes, structures could make it difficult?</li> <li>▪ What are the barriers that need to be resolved?</li> <li>▪ Who or what groups would we need to get on board to be successful?</li> </ul>

1. List all forces supporting change in the column to the left, and all forces restraining change in the column to the right.
2. Assign a score to each force, from 1 (weak) to 5 (strong).
3. What actions are necessary to deal with the supporting and restraining forces?
4. What actions are the top priorities for first steps?



This chart presents the format that was used to develop each of the alternative transportation coordination strategies for the Toledo region presented below.

2000/01/27 10:17:25 AM



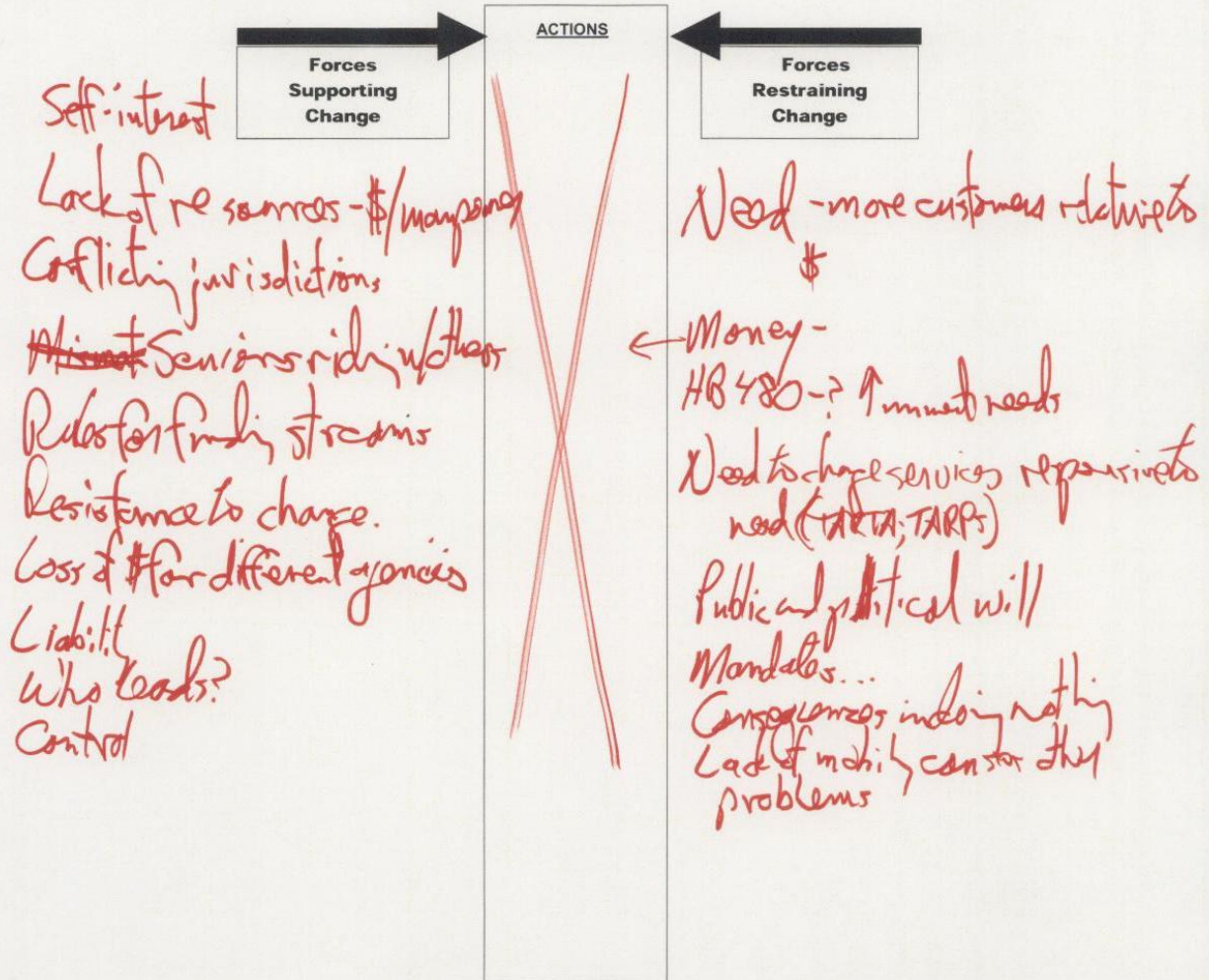
# Do Nothing Force Field Analysis



Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>What important problems does this solve?</li> <li>What doesn't it solve?</li> <li>What other existing processes and structures support this action?</li> <li>Who could lead this exercise?</li> <li>What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>What would we give up or lose?</li> <li>What forces, processes, structures could make it difficult?</li> <li>What are the barriers that need to be resolved?</li> <li>Who or what groups would we need to get on board to be successful?</li> </ul>

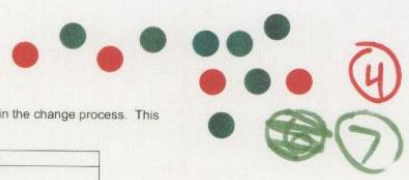
- List all forces supporting change in the column to the left, and all forces restraining change in the column to the right.
- Assign a score to each force, from 1 (weak) to 5 (strong).
- What actions are necessary to deal with the supporting and restraining forces?
- What actions are the top priorities for first steps?





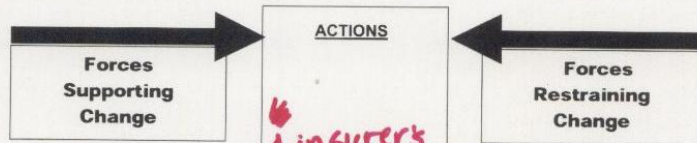
# Central Information Source Force Field Analysis

Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.



Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>What important problems does this solve?</li> <li>What doesn't it solve?</li> <li>What other existing processes and structures this action?</li> <li>Who could lead this exercise?</li> <li>What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>What would we give up or lose?</li> <li>What forces, processes, structures could make it difficult?</li> <li>What are the barriers that need to be resolved?</li> <li>Who or what groups would we need to get on board to be successful?</li> </ul>

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- Assign a score to each force, from 1 (weak) to 5 (strong).
- What actions are necessary to deal with the supporting and restraining forces?
- What actions are the top priorities for first steps?



- lack of money
- wonderful idea
- regional concept
- desire to serve populations & meeting needs
- technology - more savvy consumers + availability of new technology
- politicians
- increasing fuel costs
- more elderly/disabled
- environmental concerns
- easy access - guaranteed rides if making own arrangements
- better handle on services/needs/capacity

↓  
 Δ insurers hearts to allow coord.  
 agreements between agencies

- lack of \$
- politicians turfism
- privatization
- liability issues
- Control
- unwillingness to Δ / afraid to try
- compatible technology
- heavy demand on vehicles at peak times

# CENTRAL TRIP PLANNER + TRIP BROKER

## Force Field Analysis

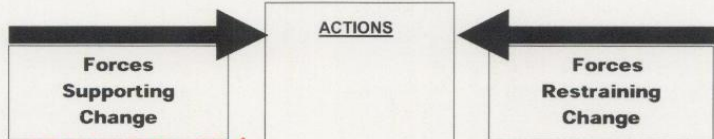
②

②

Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>What important problems does this solve?</li> <li>What doesn't it solve?</li> <li>What other existing processes and structures this action?</li> <li>Who could lead this exercise?</li> <li>What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>What would we give up or lose?</li> <li>What forces, processes, structures could make it difficult?</li> <li>What are the barriers that need to be resolved?</li> <li>Who or what groups would we need to get on board to be successful?</li> </ul>

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- What actions are necessary to deal with the supporting and restraining forces?
- What actions are the top priorities for first steps?



EASIER TO CALL IN OR USE COMPUTER SOFTWARE  
 FLEXIBILITY  
 AVAILABILITY  
 BROKER TO TAKE RESPONSIBILITY TO FIGURE TRIP \* FUNDING

SOME AGENCIES WANT CONTROL.  
 LIABILITY ISSUES.  
 \* Visually impaired miss van - different vans don't know person's needs  
 \* Vans pull up a cross street - some drivers/dispatchers don't call - some do  
 \* Call a ride 9-4  
 M-F → Waterville  
 call a ride  
 how will this work with BROKER





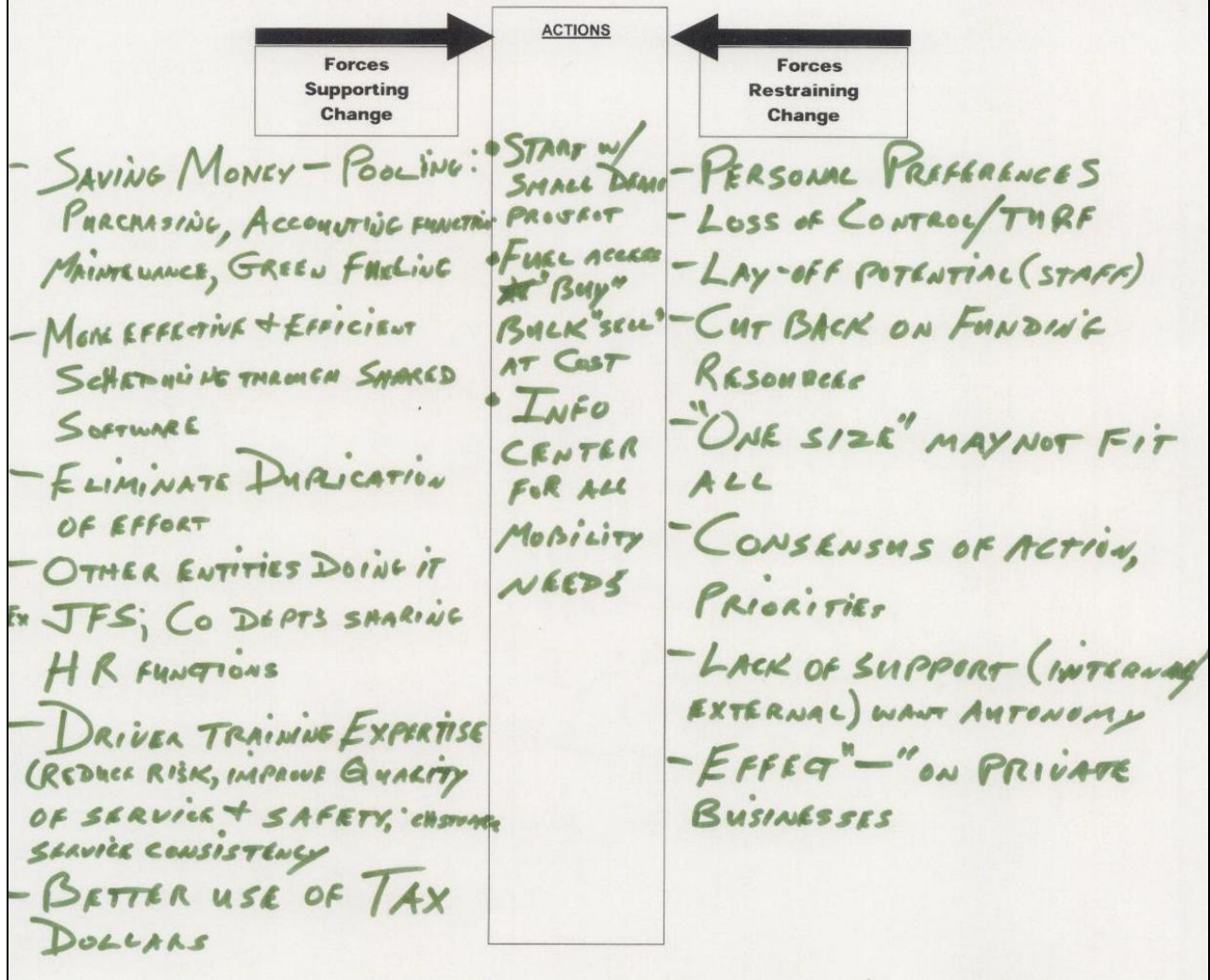
# COORD ADMIN + OPS TRANS. FUNCTIONS

## Force Field Analysis

Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>• What important problems does this solve?</li> <li>• What doesn't it solve?</li> <li>• What other existing processes and structures hinder this action?</li> <li>• Who could lead this exercise?</li> <li>• What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>• What would we give up or lose?</li> <li>• What forces, processes, structures could make it difficult?</li> <li>• What are the barriers that need to be resolved?</li> <li>• Who or what groups would we need to get on board to be successful?</li> </ul>

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2. Assign a score to each force, from 1 (weak) to 5 (strong).
3. What actions are necessary to deal with the supporting and restraining forces?
4. What actions are the top priorities for first steps?





# ADD NEW SERVICES

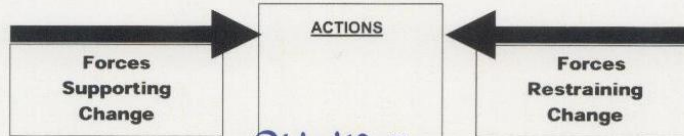
## Force Field Analysis



Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>• What important problems does this solve?</li> <li>• What doesn't it solve?</li> <li>• What other existing processes and structures does this action?</li> <li>• Who could lead this exercise?</li> <li>• What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>• What would we give up or lose?</li> <li>• What forces, processes, structures could make it difficult?</li> <li>• What are the barriers that need to be resolved?</li> <li>• Who or what groups would we need to get on board to be successful?</li> </ul>

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3. What actions are necessary to deal with the supporting and restraining forces?
4. What actions are the top priorities for first steps?



- Unmet needs in current system
- Will of the people
- Changing population
- Existing services are overburdened
- Economy → cost to consumers
- New ideas
- Different funding sources "new \$"
- More options

- ACTIONS**
- 1 Identify the needs
  - 2 Identify funding sources and review funding sources.
  - 3 Public relations (who to serve + who will support the service)
  - 4 Allocation of funds
  - 5 with whom to collaborate

- Funding - limited resources
- Process of developing + implementing new services is overwhelming
- Disagreement over what new services are truly needed. How do you decide?
- Perception of "Status Quo" is OK
- Overcoming rules + regulations
- Fear of losing funds (Agencies)

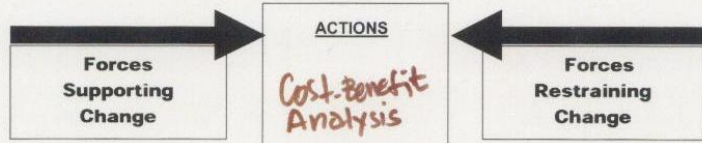
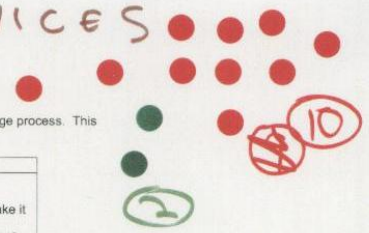
# CONSOLIDATION OF ALL SERVICES

## Force Field Analysis

Force Field analysis is a method for identifying, discussing, and evaluating forces that support and restrain the change process. This analysis can assist in developing strategies for change that are successful.

Supporting Forces	Restraining Forces
<ul style="list-style-type: none"> <li>What important problems does this solve?</li> <li>What doesn't it solve?</li> <li>What other existing processes and structures this action?</li> <li>Who could lead this exercise?</li> <li>What forces create or encourage opportunities?</li> </ul>	<ul style="list-style-type: none"> <li>What would we give up or lose?</li> <li>What forces, processes, structures could make it difficult?</li> <li>What are the barriers that need to be resolved?</li> <li>Who or what groups would we need to get on board to be successful?</li> </ul>

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- What actions are necessary to deal with the supporting and restraining forces?
- What actions are the top priorities for first steps?



Users of Trans. Serv.  
 Human Service Agencies  
 Financial/funding Issues  
 High Fuel Costs  
 Joint-Purchasing of Transportation Serv.  
 Reduce Duplication of Services/  
 Eliminate Redundant  
 Simplify System of Trans. Service

**ACTIONS**  
 Cost-Benefit Analysis  
 One-Stop Shop  
 Regionalism  
 Consensus-Building  
 Diverse Mobility Options  
 Develop a Funding Plan

Parochialism  
 New Taxes  
 Resistance to Change  
 Loss of Power/Control!  
 Self Interest/Preservation  
 Territorial  
 Sharing Funds/Vehicles  
 Cultural/Social Issues  
 More Bureaucracy

## **APPENDIX III**

### **Fact Sheets**

**5316 – Job Access and Reverse Commute Program**

**5317 – New Freedom Program**

## **FACT SHEET**

### **Formula Program for Elderly Persons and Persons with Disabilities Section 5310 - Federal Transit Administration, US DOT**

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Section 5310, the Formula Program for Elderly Persons and Persons with Disabilities program, provides formula funding to States for the purpose of assisting private nonprofit groups and certain public bodies in meeting the special transportation needs of seniors and persons with disabilities. Funds are apportioned based on each State's share of population for these groups of people and are primarily to be used for capital expenses but may include purchase-of-service agreements. This program requires coordination with other federally assisted programs and services in order to provide the most effective use of federal resources. Not-for-profit, public transit, and/or specialized human service providers are awarded funds, by States, to purchase buses, vans, and related capital items, and to engage in the purchase of transportation service contracts.

Funds are obligated based on the annual program of projects included in a statewide grant application. The State agency ensures that local applicants and project activities are eligible and in compliance with Federal requirements, that private not-for-profit transportation providers have an opportunity to participate as feasible. The program requires a coordinated planning process with other Federally-assisted programs and services. Once FTA approves the application, funds are available for state administration of its program and for allocation to individual subrecipients within the state.

There are three categories of eligible subrecipients of Section 5310 funds:

1. Private non-profit organizations;
2. Governmental authorities that certify to the chief executive officer of a State that no non-profit corporations or associations are readily available in an area to provide the service; and
3. Governmental authorities approved by the State to coordinate services for elderly individuals and individuals with disabilities.

Local governmental authorities eligible to apply for Section 5310 funds as coordinators of services for elderly persons and persons with disabilities are those designated by the State to coordinate human service activities in a particular area. Examples of such eligible governmental authorities are a county agency on aging or a public transit provider which that State has identified as the lead agency to coordinate transportation services funded by multiple Federal or State human service programs.

Funds for the Section 5310 program are available for capital expenses as defined in Section 5302(a)(1) to support the provision of transportation services to meet the special needs of elderly persons and persons with disabilities. Examples of capital expenses include, but are not limited to:

- buses;
- vans;

- radios and communication equipment;
- vehicle shelters;
- wheelchair lifts and restraints;
- vehicle rehabilitation; manufacture, or overhaul;
- preventive maintenance, as defined in the National Transit Database (NTD);
- extended warranties which do not exceed the industry standard;
- computer hardware and software;
- initial component installation costs;
- vehicle procurement, testing, inspection, and acceptance costs;
- lease of equipment when lease is more cost effective than purchase. ;
- acquisition of transportation services under a contract, lease, or other arrangement.  
Both capital and operating costs associated with contracted service are eligible capital expenses. User-side subsidies are considered one form of eligible arrangement. ;
- the introduction of new technology, through innovative and improved products, into public transportation;
- transit related intelligent transportation systems (ITSs); and
- supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management activities may include:
  - The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low income individuals;
  - Support for short term management activities to plan and implement coordinated services;
  - The support of State and local coordination policy bodies and councils;
  - The operation of transportation brokerages to coordinate providers, funding agencies and customers;
  - The provision of coordination services, including employer-oriented Transportation Management Organizations' and Human Service Organizations' customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
  - The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
  - Operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems. (Acquisition of technology is also eligible as a stand alone capital expense).



**FACT SHEET**  
**Job Access and Reverse Commute Program (JARC)**  
**Section 5316 - Federal Transit Administration, US DOT**

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The goal of the JARC program is to improve access to transportation services to employment and employment related activities for welfare recipients and eligible low-income individuals and to transport residents of urbanized areas and nonurbanized areas to suburban employment opportunities. Toward this goal, the Federal Transit Administration (FTA) provides financial assistance for transportation services planned, designed, and carried out to meet the transportation needs of eligible low-income individuals, and of reverse commuters regardless of income.

Job Access grants are intended to develop transportation services to assist welfare recipients and other low-income individuals get to and from jobs and training. Reverse Commute grants are designed to develop transit services to transport workers living in urban centers to suburban and rural job sites. Grants may finance a wide variety of capital projects and operating costs of equipment, facilities, and associated capital maintenance items related to providing access to jobs (including the purchase of transportation services); promote the use of transit by workers with nontraditional work schedules; promote the use by appropriate agencies of transit vouchers for welfare recipients and eligible low income individuals; and promote the use of employer-provided transportation including the transit pass benefit program.

Program activities include information sharing, interagency coordination, technical assistance, best practice documentation, and demonstrations of innovative services and coordination planning. Emphasis is placed on projects that use mass transportation services.

The two measures established for the JARC Program to assess success are:

1. Actual or estimated number of jobs that can be accessed as a result of geographic or temporal coverage of JARC projects implemented in the current reporting year.
2. Actual or estimated number of rides (as measured by one-way trips) provided as a result of the JARC projects implemented in the current reporting year.

Funds from the JARC program are available for capital, planning, and operating expenses that support the development and maintenance of transportation services designed to transport low-income individuals to and from jobs and activities related to their employment and to support reverse commute projects.

Eligible Projects may include, but are not limited to, capital, planning, and operating assistance to support activities such as:

- a. Late-night and weekend service;
- b. Guaranteed ride home service;
- c. Shuttle service;

- d. Expanding fixed-route public transit routes;
- e. Demand-responsive van service;
- f. Ridesharing and carpooling activities;
- g. Transit-related aspects of bicycling
- h. Local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides;
- i. Promotion, through marketing efforts, of the:
  - (1) use of transit by workers with non-traditional work schedules;
  - (2) use of transit voucher programs by appropriate agencies for welfare recipients and other low-income individuals;
  - (3) development of employer-provided transportation such as shuttles, ridesharing, carpooling; or
  - (4) use of transit pass programs and benefits under Section 132 of the Internal Revenue Code of 1986;
- j. Supporting the administration and expenses related to voucher programs. This activity is intended to supplement existing transportation services by expanding the number of providers available or the number of passengers receiving transportation services.
- k. Acquiring Geographic Information System (GIS) tools;
- l. Implementing Intelligent Transportation Systems (ITS), including customer trip information technology;
- m. Integrating automated regional public transit and human service transportation information, scheduling and dispatch functions;
- n. Deploying vehicle position-monitoring systems;
- o. Subsidizing the costs associated with adding reverse commute bus, train, carpool van routes or service from urbanized areas and nonurbanized areas to suburban work places;
- p. Subsidizing the purchase or lease by a non-profit organization or public agency of a van or bus dedicated to shuttling employees from their residences to a suburban workplace;
- q. Otherwise facilitating the provision of public transportation services to suburban employment opportunities;
- r. Supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management techniques may enhance transportation access for populations beyond those served by one agency or organization within a community.



**FACT SHEET**  
**New Freedom Program**  
**Section 5317 - Federal Transit Administration, US DOT**

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DOT may make grants under this section to a recipient for new public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act of 1990 that assist individuals with disabilities with transportation, including transportation to and from jobs and employment support services. Federal funds for capital projects under this section may not exceed 80 percent of the net capital costs of the project; Federal funds for operating assistance may not exceed 50 percent of the net operating costs of the project. Expenditures such as funding wheelchair accessible taxis and purchase of transportation services are allowable under this program.

New Freedom projects must be coordinated with activities Section 5310, 5316, and with related activities under programs of other Federal departments and agencies. Beginning in fiscal year 2007, 5317 recipients need to certify that the projects selected were derived from a locally developed, coordinated public transit-human services transportation plan; and the plan was developed through a process that included representatives of public, private, and nonprofit transportation and human services providers and participation by the public.

The New Freedom formula grant program aims to provide additional tools to overcome existing barriers facing Americans with disabilities seeking integration into the work force and full participation in society. Lack of adequate transportation is a primary barrier to work for individuals with disabilities. The 2000 Census showed that only 60 percent of people between the ages of 16 and 64 with disabilities are employed. The New Freedom formula grant program seeks to reduce barriers to transportation services and expand the transportation mobility options available to people with disabilities beyond the requirements of the ADA of 1990.

The three measures established for the New Freedom Program are:

1. Increases or enhancements related to geographic coverage, service quality and/or service times that impact availability of transportation services for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year.
2. Additions or changes to environmental infrastructure (e.g., transportation facilities, side walks, etc), technology, and vehicles that impact availability of transportation services as a result of the New Freedom projects implemented in the current reporting year.
3. Actual or estimated number of rides (as measured by one-way trips) provided for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year.

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

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

- New Public Transportation Services Beyond the ADA. The following activities are examples of eligible projects meeting the definition of new public transportation.
  - (1) Enhancing paratransit beyond minimum requirements of the ADA.
  - (2) Feeder services. New “feeder” service (transit service that provides access) to commuter rail, commuter bus, intercity rail, and intercity bus stations, for which complementary paratransit service is not required under the ADA.
  - (3) Making accessibility improvements to transit and intermodal stations not designated as key stations.
  - (4) Travel training. New training programs for individual users on awareness, knowledge, and skills of public and alternative transportation options available in their communities. This includes travel instruction and travel training services.
  
- New Public Transportation Alternatives Beyond the ADA. The following activities are examples of projects that are eligible as new public transportation alternatives beyond the ADA under the New Freedom Program:
  - (1) Purchasing vehicles to support new accessible taxi, ride sharing, and/or vanpooling programs.
  - (2) Supporting the administration and expenses related to new voucher programs for transportation services offered by human service providers.
  - (3) Supporting new volunteer driver and aide programs. Supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management is an eligible capital cost. Mobility management techniques may enhance transportation access for populations beyond those served by one agency or organization within a community.

