Coordinated Human Services Transportation Plan Kickoff Meeting
August 19, 2019

AGENDA

Welcome and Introductions
Project Goals and Expectations
Scope of Work and Timeline
Data Collection
Immediate Next Steps
WELCOME AND INTRODUCTIONS

PROJECT TEAM

- Nelson\Nygaard Consulting Associates
  - Bethany Whitaker – Project Manager
  - Bill Schwartz – Deputy Project Manager
  - Jeri Stroupe
    - Marvin Ranaldson
- Monahan Mobility Consulting – Patti Monahan
- E. Austell Associates – Elnora Austell
- Schweiger Consulting – Carol Schweiger
PROJECT GOALS AND EXPECTATIONS
UNDERSTANDING OF SHARED RESPONSIBILITIES

Nelson\Nygaard Team, CTAA, AAA-1B

<table>
<thead>
<tr>
<th>Nelson\Nygaard</th>
<th>CTAA/AAA-1B</th>
<th>Shared Responsibilities</th>
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<tbody>
<tr>
<td>• Technical Working Group</td>
<td>• Create overall engagement schedule and timeline</td>
<td>• Set goals and objectives</td>
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<td>• Stakeholder interviews</td>
<td>• Match goals and audiences with individual engagement phases</td>
<td>• Identify target audiences</td>
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<td>• Agency site visits</td>
<td>• Plan events and activities</td>
<td>• Develop content and materials</td>
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<tr>
<td>• Data collection</td>
<td>• Advertise and drive participation at events</td>
<td>• Staff activities and events</td>
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<td>• Use findings to inform plan and recommendations</td>
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<td>• Summarize findings</td>
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OVERALL PROJECT TASKS

• Project Initiation and Management
• 5310 Program Management
• Technical Working Group
• Existing Conditions Overview
• User Overview
• Funding Overview
• Engagement
• Final Plan
• Pilot Development and Management

SCHEDULE

<table>
<thead>
<tr>
<th>Task</th>
<th>2019</th>
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<tbody>
<tr>
<td>5310 Program Management</td>
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<tr>
<td>Existing Conditions</td>
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<td>User Profiles</td>
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<td>Funding Overview</td>
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<td>Stakeholder and Community Engagement</td>
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<td>Strategy Evaluation and Recommendations</td>
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<td>Final Plan</td>
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<tr>
<td>Pilot Development and Management</td>
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5310 PROGRAM DEVELOPMENT

- Inventory FTA Requirements and State Goals
- Inventory 5310 Program Management Plans and Coordinated Public Transit—Human Services Transportation Plans
- Recommendations
  - Division of funding: designated recipient(s)
  - Detroit and Ann Arbor UZAs
  - Non-urbanized areas in Macomb, Oakland, Wayne, and Washtenaw counties
  - Subrecipient application process and project selection criteria
  - Development of Program of Projects
  - Vehicle procurement
  - Ensuring 55% traditional/45% non-traditional projects in each apportionment area
  - Oversight of subrecipients for compliance with federal regulations; support and technical assistance
  - NTD and other reporting

EXISTING CONDITIONS

- Review Previous Studies and Plans
- Agency Site Visits and Stakeholder Interviews
- Transit Service Inventory
- Demographic Analysis: Focus on Individuals with Disabilities, Older Adults and Low-Income Populations
- Peer Review: Regional Coordination Efforts
- Identification of Needs and Gaps
- Existing Conditions Briefing Book
USER OVERVIEW

- Data Collection Methodology
- Data Analysis / Develop User Profiles
- Technical Memo: User Profiles

FUNDING OVERVIEW

- Funding Inventory
- Peer Review and Case Study Research
- Funding Gap Analysis and Opportunities
RECOMMENDATIONS

• Identify and Evaluate Strategies
• Strategy Development
• Prioritization of Strategies
• Recommendations: Strategies, Pilots, Cost, Funding and Performance Measures

FINAL PLAN AND PILOT

• Draft Coordinated Plan
• Final Coordinated Plan
• Pilot Development and Management
DATA COLLECTION

Methodology and Approach

• Two-part data collection
  1. Service Inventory
  2. User Profiles

• Clarify needs, goals and approach

• Develop effective data collection protocols and tools
USER OVERVIEW

• Understand existing riders – demographics, travel patterns and experiences
  o Trip manifests
  o Rider surveys

• Data will be organized by region and provider

• Designed to support “User Profiles”
  o Who is using the services
  o Where are they going (geography)
  o How they are using them (trip purpose)
  o Experiences
  o Technology

SERVICE INVENTORY

• Build from existing resources and partners
  o Previous plans
  o Budgets/financial documents
  o Existing databases / service inventories
    • 2015 database to start
    • Myride2 website and inventory
  o Site visits and stakeholder interviews

• Use web resources to verify and confirm

• Collect remaining pieces from providers and agencies
  o Telephone interviews
  o Agency site visits
WHEN DATA IS NOT READILY AVAILABLE

• Always risk associated with data collection
  - User profiles / survey data can be complicated

• Confidence stems from
  - Multiple ways to collect information
  - Ability to leverage stakeholder resources
  - Experience

• Evaluate importance of missing data
  - Adjust approach accordingly
OnHand: Maximizing Coordinated Human Services Transportation In Southeast Michigan

November - December 2019
WHAT IS ON HAND?

ONHAND IS AN INITIATIVE TO ..... 

• Maximize coordinated human services transportation in SEM by:
  o Studying and building upon the successes of the existing system
  o Building upon previous studies and best practices
  o Recommending strategies to help fill existing service gaps and ...
  o Making the best use of existing and future mobility-oriented technologies
**PROJECT TEAM ~ FUNDING SOURCE ~ PARTNERS**

- Nelson\Nygaard Consulting Associates
  - Bethany Whitaker – Project Manager
  - Bill Schwartz – Deputy Project Manager
  - Jeri Stroupe – Lead Planners
  - Marvin Ranaldson – Lead Planners
- Monahan Mobility Consulting – Patti Monahan
- E. Austell Associates – Elnora Austell
- Schweiger Consulting – Carol Schweiger
- Funded by a grant from the RTA
- Partnering with AAA1B and Community Transportation Association of America

**EXISTING CONDITIONS**

**Phase 1 – Research, Data Collection and Analysis**

- Review Existing Plans, Policies and Programs
- Stakeholder Interviews
- Site Visits
- Service Inventory
- Demographic Analysis
- Peer Review
- Needs Analysis/Gap Assessment

Completed by November / December 2019
DETAILED DATA COLLECTION

Phase 2 – Surveys, Funding and Documentation

- User Profiles
- Funding Inventory
  - Peer Review/Case Study Research
  - Funding Gap Analysis
- Existing Conditions Briefing Book

Completed by November / December 2019

RECOMMENDATIONS

Phase 3 – Engagement and Strategy Development

- Identify and develop strategies
  - Research / analysis
  - Peer reviews and case study
  - Stakeholder input
  - Technical Working Group
- Prioritize and recommend strategies
  - Evaluation criteria set by TWG
- Pilot project opportunities and recommendations

Draft strategies and recommendations by Spring 2020
WHO WE WANT TO REACH AND WHY

Who do we want to reach?
- Service providers
- Human services organizations
- Current and potential service users
- Advocacy organizations
- Urban, suburban and rural representation from across the region
- Others?

What do we want to learn?
- Service successes
- Service needs
- Opportunities
- Issues and challenges
TOOLS WE PLAN TO USE

Interviews
• One-on-ones with community providers
• Small group interviews/focus groups with service users at program sites and other locations

Surveys
• Service providers, users, others
• Email and intercept

Site Visits and Presentations
• LAC and other advisory group meetings
• Community and target audience meetings

WHERE WE’D LIKE TO GO

Meet People Where They Are
• Across the region
• Using community transit
• At senior centers
• At community events
• At human services agencies
• At existing community and group meetings
• Other?
Questions for You

- Does this outreach approach make sense for your area?
- If so, what specific sites, programs should we visit for interviews, meetings and/or surveys?
- If not, what approach do you suggest?
NEXT STEPS

• Identify and reach out for outreach opportunities
  o Information/ask letter with follow-up
  o Partner with providers, agencies, community organizations, etc.
  o LACs and advocacy groups

• Develop initial outreach schedule
  o Activities from January through March 2020
  o Continue to add as new opportunities are identified
**NEXT STEPS**

- Complete survey and other outreach tools
  - Ongoing through December 2019
- Launch engagement activities
  - January 2020

**THANK YOU!**

Bethany Whitaker  
Project Manager  
857-305-8003  
bwhitaker@nelsonnygaard.com
AGENDA

• Welcome and Introductions
• Update on Project Schedule / Status
• User Profiles / Survey Plan
• Stakeholder Interviews and Meetings
• 5310 Program Management
• Market Analysis
• Transportation Service Inventory
• Next Steps
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
  o Older adults
  o Persons with disabilities
  o Individuals with low incomes

• Develop a framework to strengthen existing coordination efforts

• Use process that is consistent with the federal requirements

How can the SE Michigan Transit Partners provide mobility options for seniors, people with disabilities, and people with low incomes that are also cost efficient for the region?
ONHAND PROJECT SCHEDULE

USER PROFILES / SURVEY PLAN
USER SURVEY

Survey and Survey Plan

• Survey Development
  o Review and comment with sub-committee
  o 15 total questions
    ▪ 7 questions about travel and experiences
    ▪ 7 about characteristics (age, occupation, mobile phone use, etc.)
    ▪ 1 open ended question
Change to ADA paratransit services
Specialized Service (i.e. SMART Connector or AATA Gold Ride Services)

2. What other services do you use? (Select all that apply)
   - Fixed route bus services offered by The Ride, SMART or DDOT
   - ADA paratransit service
   - SMART Connector Service
   - Agency transportation (i.e. service provided by nonprofit organization or other agency)
   - Drive myself
   - Use taxis, Uber, Lyft or other private service
   - Other (family, friends, etc.)

6. If yes, which types of trips are difficult to make?
   - School, classes or educational activities
   - Work
   - Shopping or personal errands
   - Doctor’s appointments or medical services
   - Physical therapy or exercise classes
   - Visit friends or family
   - Other:

7. What makes traveling difficult? (Select all that apply)
   - Find the trip origin or destination

USER SURVEY

Survey and Survey Plan

• Next Steps
  - Confirm final survey
  - Create web version of survey
  - Code, print and distribute hard copies
### USER SURVEY

**Distribution Plan**

- After Thanksgiving until January 2020
  - Track responses and categories, adjust distribution as needed

- Survey Distribution
  - Work with partners (and TWG) to distribute electronic and paper copies
  - Email link to contacts database
  - Post on RTA website (any OnHand partners?)

### STAKEHOLDER INTERVIEWS AND MEETINGS
MEETINGS WITH LOCAL COORDINATING COUNCILS

• Meeting Goals
  o Create awareness for the OnHand project
  o Ask for help/input on survey distribution and other activities

• Meetings scheduled/held to date
  o SMART Onbuds (various dates)
  o AAATA LAC Meeting – November 5, 2019
  o DDOT ADA LAC Meeting – November 19, 2019
  o TCC (AAATA) – Friday, November 22, 2019
  o SAC (SMART’s Advisory Committee) - December 19, 2019

SECTION 5310 PROGRAM MANAGEMENT
SOUTHEAST MICHIGAN

Existing Conditions

• RTA is designated recipient, both UZAs
  o Allocates funding among providers in each UZA
  o Ensures 55% traditional/45% non-traditional split for each area

• Providers: SMART, DDOT, DTC, AAATA
  o Direct recipients for their own funds and those awarded to subrecipients

2019 FEDERAL 5310 FUNDING

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<td>SMART</td>
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<td>$1,650,288</td>
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<td>$3,880,948</td>
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**PROGRAM MANAGEMENT**

### Strengths

- Regional collaboration and cooperation
- Common elements in current administration
  - Program Management Plans
  - Project selection criteria
  - Oversight procedures
- Local knowledge
  - Needs of target populations
  - Providers and services

### Opportunities

- Reduce duplicative administrative efforts
  - Two local solicitations for subrecipient projects
    - Some subrecipients apply for funding in multiple areas
  - Three coordinated plans, program management plans, programs of projects
- Continue and expand on regional collaboration
  - Coordinated plan for region
  - Solicitations for projects
  - More formal, consistent subrecipient oversight procedures
- Streamline 5310 program
  - Increase understanding in the region of needs, efforts, and successes
  - Increase consistency of services across region
  - Ease burden on subrecipients
5310 PROGRAM MANAGEMENT PEER REVIEW

5310 PROGRAM ELEMENTS

Reviewed for peer areas

- Roles and responsibilities
  - Designated recipient
  - Coordinated Plan
  - Program Management Plan
  - Project solicitations
  - Program of Projects

- Application process
  - Selection criteria
  - Application format
  - Timing

- Subrecipient oversight

- Notable features

- Metro areas:
  - Atlanta
  - Chicago
  - Dallas-Fort Worth
  - New York City
  - San Francisco
  - Washington DC
# PEER REVIEW SUMMARY

**Key findings – Regional 5310 programs**

- Flexibility
- Lead agency is usually MPO or MPO + partner
- Regional coordinated plans include both regional and specific local strategies
- Direct recipients can maintain responsibility for local subrecipient management
- Comprehensive subrecipient oversight programs in some areas
- Some examples of specific performance measures
### COORDINATED PLAN

**One regional plan**
- Include both regional and specific local strategies and projects
- Involve local stakeholders in plan development
- Pros:
  - Reduced administrative time
  - Consistent methodology for assessment of needs across region
  - Regional coordination plus identification of specific local needs
- Cons:
  - Perceived loss of local control

### PROJECT SOLICITATION

**Unified process across region**
- Lead agency: RTA (or SEMCOG)
- One application, process; common selection criteria; oversight program; performance measures
- Ease transition for subrecipients with workshops, assistance with application prep
PROJECT SOLICITATION

Unified process across region

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
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<tbody>
<tr>
<td>• Reduced administrative time-PMP, POP, project solicitation, contracting</td>
<td>• Perceived loss of local control</td>
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<tr>
<td>• Easier process for subrecipients serving more than one area</td>
<td>• Initial adjustment needed by subrecipients</td>
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<tr>
<td>• More consistent services regionwide</td>
<td>• Administrative burden would fall on one entity</td>
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<tr>
<td>• Consistent subrecipient oversight</td>
<td>• Could move to a biennial solicitation schedule</td>
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<td>• SMART, The Ride, DDOT could be tasked with oversight in their areas</td>
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<td>• Increased opportunities for coordination across jurisdictions</td>
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<td>• Elimination of timing conflicts between current separate processes</td>
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SUBRECIPIENT OVERSIGHT

Develop common procedures

• Combine best practices of RTA, SMART, and AAATA

• Add best practices of peers
  o Reporting
  o Periodic desk reviews of data and records
  o Periodic site visits
DISCUSSION POINTS

Feedback on potential program management changes

• Combined project solicitation process
  o Application format
  o Selection criteria
  o Performance measures
  o Annual vs. biennial
  o Support for applicants

• More formal subrecipient oversight procedures

• Roles and responsibilities
  o Coordinated plan
  o Project solicitation
  o Subrecipient oversight

NEXT STEPS

Take feedback and draft program management elements

• Project solicitation process

• Subrecipient oversight program

• Annotated Program Management Plan outline
MARKET ANALYSIS

Change in Population
2010 to 2017
- Decrease of more than 5000
- Decrease of 500 to 1000
- Decrease of 0 to 499
- No Change
- Increased by 50 to 99
- Increased by 500 to 1499
- Increased by more than 1500

Source: U.S. Census Bureau, Economic Census 2007 and 2017. (C) 2017 ACCA Network.
MARKET ANALYSIS

Findings and Insights for On Hand

• Stable growth but continued sprawl
  o Loss in urban core to suburban and rural fringe
  o Harder to serve efficiently with demand response service

• Highest need community in Wayne County and City of Detroit
  o Followed by southern portions of Macomb and Oakland County

• Most vulnerable population also greatest in Wayne County
  o High needs in urbanized areas, but also in rural communities
SERVICE INVENTORY

Sources and Resources

- Transit agency published schedules and services
- SMART Community Funding Program
- 5310 Recipients
- AAA 1-B Myride database
SERVICE INVENTORY OVERVIEW

Hierarchy of Providers

Public Transit Service Providers – Fixed Route and ADA (5 providers)

SMART Community Network and 5310 (70+ providers)

Nonprofit agencies (100+ providers)

Public Transit Service Providers – Fixed Route and ADA (5 providers)

- Funded with federal, state and local grants
- Open to members of the public
- Designed to meet greatest demand
- Eligibility requirements
- Low fares
- Unrestricted trip purpose
SMART Community Network and 5310 Providers (70+)
- Funded with federal and local funds (primarily)
- Available to general public
- Local trips
- Developed with older adults and people with disabilities in mind
- Low fares

Requesting a list (spreadsheet) of 5310 sub-recipients in 4-county region for past 3 years

Nonprofit and Human Service Providers (100 providers)
- May use public grants, but also other sources
- Designed to meet needs of clients
- Restricted access and trip purpose
NEXT STEPS

• Service Inventory/Database
• Survey Outreach/Tracking
• 5310 Program Management
• Needs Assessment
• Next TWG Meeting Tuesday
  January 6 2020
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
Technical Working Group Meeting
Meeting #4
January 7, 2020

AGENDA

- Welcome and Introductions
- Update on Project Schedule / Status
- 5310 Program Management
- OnHand User Survey
- Transportation Service Inventory
- Next Steps
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
  o Older adults
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• Develop a framework to strengthen existing coordination efforts

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How can the SE Michigan Transit Partners provide mobility options for seniors, people with disabilities, and people with low incomes that are also cost efficient for the region?
ONHAND PROJECT SCHEDULE

5310 Program Management
Existing Conditions
User Profiles
Funding Overview
Stakeholder and Community Engagement
Strategy Evaluation and Recommendations
Final Plan
Pilot Development and Management

We are here.

5310 PROGRAM MANAGEMENT
USER SURVEY

Status Update

- Soft Launch in December 2019
- More active distribution in January 2019
- Updated with corrections/edits
  - PDF is fully accessible with screen readers
  - Online survey is accessible and interactive with screen readers
  - Available in English and Mandarin Chinese (per requests)
USER SURVEY – PRELIMINARY FINDINGS

Status Update

• 222 surveys collected to date (181 online)
  o 77% aged less than 64
  o 58% employed full time
  o 19% diagnosed with disability or impairment
  o 54% White or Caucasian, 20% Black or African American, 13% Asian and remaining 13% varied
Survey's collected by Cranbrook Towers, Ann Arbor

USER SURVEY – NEXT STEPS

Distribution Plan

• Start more active distribution of survey
  o Looking for older adults, especially people aged 75+
  o Contacts at disability networks
    - Warriors on Wheels
    - Detroit Disability Power

• Continued help from TWG and stakeholders
TRANSPORTATION SERVICE INVENTORY

TRANSPORTATION SERVICE PROVIDER INVENTORY

- DRAFT Technical Memo submitted to RTA over holidays
  - To TWG for comment next week
TRANSPORTATION SERVICE INVENTORY – KEY FINDINGS

FIXED ROUTE AND ADA PARATRANSIT - COVERAGE
PEAK NETWORK AND EVENING - COVERAGE
MUNICIPAL DEMAND RESPONSE SYSTEMS

Note: Only collaborations shown; see municipally sponsored demand response services for complete network.

MUNICIPAL DEMAND RESPONSE SYSTEMS - COLLABORATIONS
TRANSPORTATION SERVICE PROVIDER INVENTORY

Key Findings

• Excellent geographic and temporal coverage
  o Detroit’s coverage provided by ADA paratransit
  o Fixed route networks have coverage-based approach
  o Ann Arbor coverage includes after hours services

• Resources and technical assistance through SMART
  o Funding, vehicles and technical assistance
  o Results in a strong local network of service

• Local examples of regional coordination
  o Especially in Macomb and Oakland Counties

TRANSPORTATION SERVICE PROVIDER INVENTORY

Key Findings and Opportunities

• Potential to coordinate ADA and local demand response services

• Equities / Inequities: ADA and demand response
  o Geographic
  o Quality of Service
  o Fares / Cost

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<th>ADA Paratransit</th>
<th>Demand Response</th>
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<td>Geography</td>
<td>City of Detroit</td>
<td>Suburban / rural communities</td>
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<td>Quality of Service</td>
<td>Regulated</td>
<td>Set locally</td>
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<td>Extent of Service</td>
<td>Curb-to-curb</td>
<td>Varies</td>
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<tr>
<td>Fares</td>
<td>2x Fixed Route ($3.00 per one way)</td>
<td>Varies</td>
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<tr>
<td>Eligibility</td>
<td>Regulated – requires an application</td>
<td>Usually none</td>
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<td>Best for:</td>
<td>Persons with disabilities</td>
<td>Older adults</td>
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NEXT STEPS

• Service Inventory/Database
• Survey Outreach/Tracking
• 5310 Program Management
• Needs Assessment
• Next TWG Meeting Tuesday February 18, 2020
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
Technical Working Group Meeting
Meeting #5
February 18, 2020

AGENDA

• Welcome and Introductions
• Update on Project Schedule / Status
• 5310 Program Management
• Transportation Funding Inventory
• OnHand User Survey
• Prioritization Exercise
• Next Steps
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
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How can the SE Michigan Transit Partners provide mobility options for seniors, people with disabilities, and people with low incomes that are also cost efficient for the region?
ONHAND PROJECT SCHEDULE

5310 Program Management
Existing Conditions
User Profiles
Funding Overview
Stakeholder and Community Engagement
Strategy Evaluation and Recommendations
Final Plan
Pilot Development and Management

We are here.

5310 PROGRAM MANAGEMENT
PROPOSED 5310 PROGRAM MANAGEMENT

Overview

• Draft of plan based on input and comments from TWG members, including sample project application and scoring sheet
  o Circulated for review and comment
• Draft covers:
  o Goals and objectives
  o CHSTP
  o Project selection
  o Funding distribution
  o Development of POP
  o Management and administration

DISCUSSION POINTS

• Program goals and objectives
• Roles and responsibilities – RTA, direct recipients, stakeholders
• Project selection criteria and weights
• Performance measures
• Schedule
• Details
  o Regional call for projects
  o Availability of administrative funds
  o Pre-screening of applications
PROGRAM GOALS AND OBJECTIVES

- Align resources with highest regional priorities to improve mobility
- Continue and expand on regional collaboration
- Streamline project solicitation/selection process
  - Reduce duplicative administrative efforts
- Fair and equitable distribution of 5310 funds
- Maintain relationships between direct recipients and subrecipients
- Encourage coordination among providers
- Collect more information about performance
- Involve a variety of stakeholders in 5310 planning and project selection

ROLES AND RESPONSIBILITIES

RTA

- Lead agency for development of CHSTP
  - Updates every 4-5 years at a minimum
- Distribute single, regional call for projects
  - Assistance from direct recipients
- Determine 5310 funding targets: set-asides, 55%/45% split in each UZA
  - Administration – RTA and direct recipients only, or available to subrecipients?
  - Current regional priorities
  - Traditional vs. non-traditional projects
- Technical assistance to potential applicants
- Serve on project selection committee
- Approval of POP
- Develop PMP and MOUs with direct recipients
### ROLES AND RESPONSIBILITIES

#### Direct Recipients – SMART, AAATA, DDOT, DTC

- Participate in development of CHSTP
- Provide input on annual goals, objectives, and funding targets/set-asides
- Serve on project selection committee
  - Assist with advertisement of call for projects
  - Pre-screen applications?
- Administration of selected projects
  - Contracting
  - Reporting
  - Billing
  - Procurement (SMART)
- Subrecipient compliance oversight

#### Stakeholders

- Participate in development of CHSTP
- Comment on proposed POP
  - Broad, inclusive group
- Serve on project selection committee
  - Smaller, more targeted group
  - SEMCOG
  - AAA 1-8
  - MDOT
  - Organizations that serve older adults and people with disabilities
  - Provide input on annual goals, objectives, and funding targets/set-asides
  - Score project applications
- SEMCOG – public comment on proposed POP
PROJECT SELECTION

Process

• Initial screening by RTA staff
  o Eligibility of applicant and project
  o Technical and financial capacity
  o Project type: vehicles, equipment, and infrastructure (new and replacement); operations and mobility management

• Additional screening of capital applications by direct recipients?

• Scoring by project selection committee
  o Consider elements of applications by type of project
  o Points for each selection criterion
  o Discuss applications that receive a range of scores
  o Prepare recommendations for RTA

PROPOSED NEW SELECTION CRITERIA

Categories and Weights

• Need and Benefits – maximum 45 points
  o Consistency with CHSTP
  o Mobility improvements, elimination of transportation barriers
  o Vehicle life relative to replacement thresholds
  o Use of previous 5310 funding and vehicles/services

• Coordination and Partnerships – maximum 20 points
  o Involvement of other organizations
  o Coordination of current services
  o Contribution to regional coordination
  o Local support

• Project Readiness – maximum 35 points
  o Financial and implementation plans; sustainability
  o Experience of applicant

• Highly competitive project characteristics – 10 extra points
  o Incentive for projects that address funding priorities, such as:
    • Coordination among providers
    • New or innovative programs or services
    • Multiple needs/strategies included in CHSTP are addressed

Final criteria to be determined as coordinated plan develops, and discussed annually by project selection committee and revised as needed
ADMINISTRATION

Grants and Reporting

• Subrecipient grant agreements:
  o Detroit UZA subrecipients – SMART, DDOT, DTC
  o Ann Arbor UZA subrecipients – AAATA

• Reporting
  o FTA reports (FFRs, MPRs, Title VI, DBE, performance) – Direct recipients
  o Other data and performance measures – collected from subrecipients by direct recipients

ADMINISTRATION

Financial and Procurement

• Billing
  o Direct recipients and subrecipients

• Procurement - vehicles
  o SMART
ADMINISTRATION

Subrecipient Oversight

• Certifications to federal, state requirements
  o RTA, through federal 5310 application process

• Compliance with federal, state requirements
  o Direct recipients
  o Desk reviews
  o Site visits

PERFORMANCE MEASURES

Objectives and Measures

• Progress toward 5310 objectives
  o Improved mobility for older adults and people with disabilities
  o Specific regional and local objectives identified in coordinated plan

• Efficient and effective use of 5310 funds

• Useful federal measures already reported
  o Number of older adults, people with disabilities with mobility they would not have without traditional 5310 projects
  o Ridership, for traditional and non-traditional projects
  o Service improvements
  o Physical improvements

• Other measures
  o Cost per passenger trip
  o Cost per vehicle hour
  o Passenger trips per vehicle hour
  o Expenditures as a percentage of subrecipient’s total 5310 award for each funding cycle, if applicable

Final performance measures to be determined as coordinated plan develops
**SCHEDULE FOR DEVELOPMENT OF POP**

- Project selection committee meets two months in advance of call for project – late in calendar year
  - Discuss selection process, annual goals and funding priorities
- Regional call for projects – early in the next calendar year
- Project selection, draft POP – first quarter
- POP public comment – managed by SEMCOG; second quarter?
- Regional split of 5310 funds – spring or early summer
- Subrecipient awards – summer

---

**FUNDING INVENTORY**
FUNDING INVENTORY

Task Goals

• Inventory available funding
  o Amounts of funding
  o Distribution and use

• Evaluate funding models

• Consider performance measures

FUNDING INVENTORY

• Federal Transit Administration (FTA)
  o Transit funds (5311, 5307, 5339)
  o Older adults and people with disabilities (5310)

• Non-DOT Federal funds
  o Department of Health and Human Services

• Michigan DOT
  o Local bus operating and capital
  o Specialized services

• Regional funds / Property Tax

• Local funds
  o General revenue contributions
  o Municipal credits

• Other (fares, partnerships, etc.)
FUNDING INVENTORY

- Funding distribution varies:
  - Agency type
    - Urban vs. rural
  - Target population
    - General public
    - Older adults
    - People with disabilities
  - Capital vs. operating
  - Geography

Key Findings

- Local and regional funding is a differentiator
  - Dedicated property taxes provide more stability and growth
    - Fixed route service providers
    - Municipal based systems
  - SMART Community Partnership Program provides similar level of stability
    - Without SMART, municipalities rely on general funds
FUNDING INVENTORY

Key Findings

• All providers rely on multiple funding sources to operate
  o Loss of one source, could end service
  o Assembling multiple grants is complicated
  o Different coordination models
    ▪ Coordinated operations
    ▪ Coordinated service delivery and operations
    ▪ Differences reflect funding programs, relationships between communities, and provider organizational models.

Key Findings:

• Funding streams designed with similar goals in mind

• Grant requirements, controls or reporting limited and not well coordinated

• Performance data and service “value” not consistently captured, especially for municipal programs

Transit Funding Programs

• 5310
• MDOT Specialized Transportation
• SMART Community Transportation
• General Fund revenues
• Municipal credits
FUNDING INVENTORY

![Graph showing funding inventory over years]

USER PROFILES / SURVEY PLAN
USER SURVEY

Status Update

• Soft Launch in December 2019
• Active distribution in January 2020
• End distribution in February 2020

USER SURVEY – STATUS UPDATE

• 795 surveys collected to date (645 online, 155 paper)
  o 50% White or Caucasian
  o 30% Black or African American
  o 13% Asian and remaining 7% varied
**USER SURVEY – NEXT STEPS**

**Distribution Plan**

- Ongoing distribution and outreach
  - Looking for older adults, especially people aged 75+
  - Ending on February 29
- Develop draft survey analysis plan
- Draft results at March 31 TWG meeting
# REGIONAL PRIORITIES FOR HUMAN SERVICE / COMMUNITY TRANSPORTATION

- **Red Circle**: Highest priority - this is an area we are struggling
- **Yellow Circle**: Needs help and important but not highest priority
- **Blue Circle**: Not a priority right now

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## NEXT STEPS
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| • Comment on 5310 Program Management Plan  
  o Due March 6 |
| • Comments on Market Analysis and Provider Inventory |
| • Draft Technical Memo: Funding Analysis |
| • Needs, gaps and strategies |
| • Next TWG Meeting is Tuesday, March 31 |

THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
AGENDA

- Welcome and Introductions
- Share Best Practices
- Update on Project Schedule / Status
- OnHand User Survey
- Prioritization Exercise
- Regional Needs and Gaps
- Next Steps
INTRODUCTIONS & BEST PRACTICES/LESSONS FROM THE FIELD

INTRODUCTIONS

• Offer any lessons from the field / impact of COVID-19 on operations
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
  • Older adults
  • Persons with disabilities
  • Individuals with low incomes

• Develop a framework to strengthen existing coordination efforts

• Use process that is consistent with the federal requirements

How can the SE Michigan Transit Partners provide mobility options for seniors, people with disabilities, and people with low incomes that are also cost efficient for the region?
ONHAND PROJECT SCHEDULE

- Pilot Development and Management
- Final Plan
- Stakeholder and Community Engagement
- Strategy Evaluation and Recommendations
- Funding Overview
- User Profiles
- Existing Conditions
- 5310 Program Management

TECHNICAL MEMOS

Tech Memos Submitted

- Drafts Reports
  - Existing Conditions
  - Transportation Provider Inventory
  - Funding Inventory
- 5310 Program Management Plan
  - Updated late February/early March
- Draft final memos ready this week
  - Post on RTA website
  - Invite comment from wider audience
USER SURVEY

Methodology and Schedule

User surveys collect needs and aspirations directly from riders

December 2019  January 2020  February 2020

Soft Launch  Active Distribution  End Distribution

Online Survey
- Link forwarded to partners
- RTA’s social media
- Users filled the survey online

Written Survey
- PDF file emailed to partners
- Printed copies mailed to partners
- Survey circulated amongst users
- Scanned responses emailed back
- Survey responses mailed back
USER SURVEY – STATUS UPDATE

Survey Responses

- 1,233 surveys collected (655 online, 578 paper)

Race

- Preferred not to answer, 5%
- White or Caucasian, 41%
- Black or African American, 38%
- Other, 17%

Age-Gender Pyramid with Disability Status

- Male, 38%
- Female, 60%
- Preferred not to answer, 2%
- Transgendered, 0%

- 21% 23% 34%
- 31% 28% 20%

Gender

Age

- ≤ 34 years
- 35 – 54 years
- 55 – 64 years
- 65 – 84 years
- ≥ 85 years

- 31% 20% 20% 25% 3%

Zipcodes by Survey Respondents as of 05.23.2020

- 0 responses
- 1 to 5 responses
- 6 to 10 responses
- 11 to 25 responses
- More than 25 responses

- Oakland County
- Macomb County
- Wayne County

[Map of zipcodes with data on responses]
USER SURVEY – ANALYSIS

Targeted populations within survey sample

- Total Vulnerable Population**: 64%
- Older Population (65+): 34%
- Unemployed* Population: 40%
- People with Disability: 40%

**Unemployment for this purpose is defined as people who are unable to work due to a disability, unpaid work at home (caregiver), and retired.

"This includes people: above the age of 65, below the age of 65 who are unemployed* or with some disability.

USER SURVEY – ANALYSIS PLAN

- DRAFT Findings and Preliminary Analysis
- Coordination plan looking for input on the following key questions:
  - How well is the transit and HST network serving riders?
    - Travel patterns and behavior
    - Understand travel challenges and needs
    - Explore how users understand services
  - Does the effectiveness of the network change for different groups?
    - Age, Ability, Geography, Income and Employment Status
    - Computer literacy/access to computers and mobile phones
Respondents’ Primary Mode of Travel

- Drive myself, 41%
- Fixed route bus or rail services, 39%
- ADA paratransit service, 2%
- Agency transportation, 4%
- Specialized services, 3%
- Use taxis, Uber/Lyft, etc., 3%
- Other (family, friends, etc.), 8%

Unemployment for this purpose is defined as people who are unable to work due to a disability, unpaid work at home (caregiver), and retired

Respondents’ satisfaction with available transportation options

- Pleased
- Usually pleased
- Don’t like

- Other (family, friends, etc.): 27% 48% 25%
- Use taxis, Uber/Lyft, etc.: 37% 40% 23%
- Drive myself: 29% 41% 31%
- Agency transportation: 35% 40% 25%
- Specialized services: 42% 39% 19%
- ADA paratransit service: 38% 57% 6%
- Fixed route bus or rail services: 25% 57% 18%

Key Findings

- Satisfaction rates are higher among people using transportation services (ADA and fixed routes)
- People using agency transportation have a higher rate of dissatisfaction as compared with other groups
USER SURVEY – ANALYSIS

Respondents’ access to technology (computer or smart phone/tablet)

Key Findings

- Most people had access to a computer or a mobile phone
  - 12% don’t have access to web-based materials
- Groups with lowest rate of web-access are aged 65-84 and 85+
  - Roughly half of the respondents aged 85+ had a computer or smart phone

Access to Mobile

- Yes – both a personal computer and mobile device, 45%
- Yes – personal computer only, 4%
- Yes – mobile device only, 19%
- Neither, 12%

34 years old or younger: 34%
35 – 54 years old: 20%
55 – 64 years old: 19%
65 – 84 years old: 21%
85 years old or older: 9%

USER SURVEY – ALL RESPONSES

What are the challenges that make traveling difficult for people in SE Michigan?

Challenges making travel difficult:

- Evenings and weekends
- Information - figuring out what is available
- Walking to / from bus stops

Communicating with the driver: 5%
Calling and scheduling a ride: 8%
Knowing where to wait for a ride: 8%
The cost of the ride: 8%
Scheduling trips in advance: 8%
Understanding when vehicle is arriving or leaving: 9%
Transferring between services: 10%
Walking to/from bus stops: 12%
Finding a service/figuring out what is available: 15%
Finding rides in the evening and on weekends: 17%
USER SURVEY – ANALYSIS

What are the challenges that make traveling difficult for people with disability in SE Michigan?

People with disabilities have similar challenges as population overall:
- Evenings and weekends
- Information - figuring out what is available
- Walking to/from bus stops

What are the challenges that make traveling difficult for older adults (65 years and older) in SE Michigan?

Slightly different challenges for older adults:
- Evenings and weekends
- Information
- Calling and scheduling rides
**USER SURVEY – ALL RESPONSES**

What trips are most difficult to make for people in SE Michigan?

- Physical therapy or exercise classes: 8%
- School, classes or educational activities: 10%
- Work: 13%
- Visit friends or family: 19%
- Doctor’s appointments or medical services: 23%
- Shopping or personal errands: 27%

**Most difficult trip types:**
- Shopping, personal errands (quality of life trips)
- Doctor’s appointments or medical services
- Visiting friends or family

**USER SURVEY – ANALYSIS**

What trips are most difficult to make for people with disability in SE Michigan?

- Physical therapy or exercise classes: 9%
- School, classes or educational activities: 11%
- Work: 9%
- Visit friends or family: 18%
- Doctor’s appointments or medical services: 24%
- Shopping or personal errands: 26%

People with disabilities have trouble making the same types of trips as population overall:
- Shopping/personal errands
- Doctor appointments or medical services
- Visiting friends or family
USER SURVEY – ANALYSIS

What trips are most difficult to make for older adults (65 years and older) in SE Michigan?

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Difficulty Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical therapy or exercise classes</td>
<td>12%</td>
</tr>
<tr>
<td>School, classes or educational activities</td>
<td>5%</td>
</tr>
<tr>
<td>Work</td>
<td>3%</td>
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Slightly different trip needs for older adults:

- Doctor’s appointments or medical services
- Shopping, personal errands (quality of life trips)
- Visiting friends or family
- Physical therapy or exercise classes

SURVEY ANALYSIS PLAN

DRAFT Findings

- Data is indicative and provides insights into needs
- More analysis will be conducted in April
  - Mode choice
  - Trip needs / service gaps
  - Issues making travel difficult
- Analysis of sub-populations
  - Age, employment status, ability, and access to technology
- Deeper dive into sub-groups (for example)
  - Older adults without access to technology vs. older adults using technology
  - Persons with disabilities using fixed route buses vs. people with disabilities not using fixed route service
  - Older adults driving alone vs. older adults who don’t drive

Will explore as sample size permits and findings require
NEEDS AND GAPS

Focus on Defining Problem

- Interactive exercise
- Previously identified gaps and needs
- OnHand team’s initial ideas
- Discussion
NEEDS AND GAPS

Exercise

• Introduction to discussion of needs and gaps
• Next slide contains a matrix of potential needs
• Rate potential needs and gaps according to scale provided
  o Use numbers, letters or other scale to replace dots
  o Not constrained – can all be high or can be all low
  o Be prepared to discuss 1 or 2 topics where need is highest and lowest
    ▪ If needed, explain your interpretation/definition of need or gap

REGIONAL PRIORITIES FOR HUMAN SERVICE / COMMUNITY TRANSPORTATION

- Highest priority - this is an area we are struggling
- Needs help and important but not highest priority
- Doing okay, needs improvement but basically working
- Not a priority right now

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NEEDS, GAPS AND OPPORTUNITIES

Southeast Michigan

SOUTHEAST MICHIGAN – HST NEEDS AND GAPS

Considered Previous Plans for Consistent Themes

HST Service Needs and Gaps
- Regional access
  - Countywide connections
  - Connections across county lines
- Access to employment
  - Especially second and third shift employment outside of core areas
- Same day reservations
- Lower fares / more affordable options

HST Systems and Operations
- More/better information that is easier to find and use
  - Includes travel training
- Consistent systems
  - Passengers: eligibility criteria and service requirements
  - Operations: driver training, drug testing, etc.
  - Agency communication: facilitate ride sharing
SOUTHEAST MICHIGAN – HST NEEDS AND GAPS

Considered Previous Plans for Consistent Themes

- Summaries of needs identified in previous plans
  - See also slides 55-60

NEEDS, GAPS AND OPPORTUNITIES

Preliminary ideas and findings

### Needs and Gaps

<table>
<thead>
<tr>
<th>Available Service/Service Delivery Models</th>
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<tbody>
<tr>
<td>- Fragmented service delivery</td>
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<tr>
<td>- Mismatch between service areas and travel needs</td>
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<tr>
<td>- Limited demand response services in City of Detroit</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Information and Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Under-utilization of Mobility Management Strategies and Systems</td>
</tr>
<tr>
<td>- Complicated system for users</td>
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<table>
<thead>
<tr>
<th>Funding</th>
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</thead>
<tbody>
<tr>
<td>- Duplicative/fragmented funding streams</td>
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<tr>
<td>- Cost/funding transparency</td>
</tr>
<tr>
<td>- Service costs/cost-effectiveness</td>
</tr>
</tbody>
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<table>
<thead>
<tr>
<th>Physical infrastructure</th>
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</thead>
<tbody>
<tr>
<td>- High need/low density operating environment</td>
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<tr>
<td>- Sidewalks, bike lanes, crosswalks</td>
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### Preliminary Opportunities

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<th>Available Service/Service Delivery Models</th>
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<tr>
<td>- Strengthen consistency between services</td>
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<tr>
<td>- Scheduling platforms</td>
</tr>
<tr>
<td>- Eligibility requirements, policies and guidelines</td>
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<tr>
<td>- Reporting requirements</td>
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<tbody>
<tr>
<td>- User/customer focus</td>
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<tr>
<td>- Improve regional database (searchable, maps, timelines)</td>
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<tr>
<td>- Create funding packages</td>
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<td>- Strategies to share costs and revenues</td>
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<tr>
<td>- Identify cost sharing strategies for capital and technology</td>
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<table>
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<tr>
<th>Physical infrastructure</th>
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<tbody>
<tr>
<td>- Safe routes for seniors</td>
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<tr>
<td>- Pedestrian infrastructure, safety and security</td>
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**NEEDS, GAPS AND OPPORTUNITIES**

Preliminary ideas and findings

- **Available Service/ Service Delivery Models**
  - Fragmented service delivery
  - Mismatch between service areas and travel needs
  - Some geographies have limited demand response services

**SERVICE AND SERVICE DELIVERY**

Good coverage but lacks service quality and connections

- Most communities have some local service, but connections between communities are limited
- Services vary by community
  - Eligibility
  - Prioritized riders
  - Fares
  - Technologies
- Barriers, duplication and inefficiencies gaps
SERVICE AND SERVICE DELIVERY

Good coverage but service coordination varies

SERVICE AND SERVICE DELIVERY

Some areas with high needs lack service
SERVICE AND SERVICE DELIVERY

Some areas with high needs lack service

Mismatch between Services, Needs and Travel Patterns
SERVICE AND SERVICE DELIVERY

Mismatch between Services, Needs and Travel Patterns

DISCUSSION – SERVICE NEEDS

• What did we miss? Mis-characterize?
• Does anything need to be taken away?
• Does anything need to be added
NEEDS, GAPS AND OPPORTUNITIES

Preliminary ideas and findings

• Information and Access
  o Under-utilization of mobility management strategies and systems
  o System complexities present challenges

UNDERUTILIZED MOBILITY MANAGEMENT SYSTEMS

Challenges and Problems

• Many services operating independently
  o Inefficient trip paths
  o Duplicative services
  o Lack of regional connections
  o Difficult to understand services

• Inconsistency between and among service providers
  o Limited published policy and programs
  o Limited coordination between services

• Mobility management system comprehensive but static
  o Opportunities to better integrate information and systems
  o Lacks user orientation
  o Limited mapping/ geographic context
DISCUSSION – INFORMATION AND MOBILITY MANAGEMENT

• What did we miss? Mis-characterize?
• Does anything need to be taken away?
• Does anything need to be added

NEEDS, GAPS AND OPPORTUNITIES

Preliminary ideas and findings

• Funding
  o Duplicative/fragmented funding streams
  o Limited performance tracking / Understanding of service costs/cost-effectiveness
FRAGMENTED AND INSUFFICIENT FUNDING

Lots of funding sources but not a lot of money

• Multitude of funding complicates service administration and management

• But reporting and tracking is limited
  o Difficult to know who’s doing well and who needs help
  o Hard to act on anecdotal information

• Handful of exceptions
  o ADA paratransit (all providers)
  o SMART operated demand response systems

Lack of Performance Tracking

Cost per Trip by Community Service Provider
DISCUSSION

• What did we miss? Mis-characterize?
• Does anything need to be taken away?
• Does anything need to be added

NEEDS, GAPS AND OPPORTUNITIES

Preliminary ideas and findings

Physical infrastructure
  • Walking to bus stops cited as major challenge
  • Region has many high need/low density operating environment
    ▪ Urban and rural areas
  • Increased importance during COVID-19 pandemic
NEEDS, GAPS AND OPPORTUNITIES

Physical Infrastructure

• Lots of high-need people living in low-density areas with limited infrastructure
  o Potential for investments using 5310 funding

DISCUSSION

• What did we miss? Mis-characterize?
• Does anything need to be taken away?
• Does anything need to be added
NEXT STEPS

• Post Technical Memos to Website
• Draft Memo on Survey Results
• Summary of Needs and Opportunities
• Start identifying strategies and solutions

• Next TWG Meeting is Tuesday, May 5
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
AGENDA

- Welcome and Introductions
- Update on Project Schedule / Status
- 5310 Program Management
- OnHand User Survey
- Regional Priorities Update
- Needs, Gaps and Goals
- Next Steps
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
  o Older adults
  o Persons with disabilities
  o Individuals with low incomes

• Develop a framework to strengthen existing coordination efforts

• Use process that is consistent with the federal requirements

How can the SE Michigan Transit Partners provide mobility options for seniors, people with disabilities, and people with low incomes that are also cost efficient for the region?
ONHAND PROJECT SCHEDULE

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TECHNICAL MEMOS

Tech Memos Submitted

- Draft Reports
  - Existing Conditions (being posted)
  - Transportation Provider Inventory (being posted)
  - Funding Inventory (being posted)
  - User Survey Analysis (in review)
- 5310 Program Management Plan
ONHAND SURVEY ANALYSIS

Survey Goals
- Evaluate effectiveness of human services transportation (HST) network
  - Travel patterns and behavior
  - Travel challenges and needs
  - Service quality and availability
- Gauge effectiveness by different groups
  - Age, ability, geography, income and/or employment status, computer literacy/access to computers and mobile phones
Definitions and Assumptions

- **Target Populations**
  - People above the age 65
  - People who are unemployed*
  - People with a disability

- **Unemployed**
  - People who are unable to work due to a disability
  - People who perform unpaid work at home (e.g., caregivers)
  - People who are out of work and looking for work
  - People who are retired

- **Sample Size Within All Target Groups** (n=749)
  - People above the age of 65
  - People below the age of 65 who have a disability
  - People below the age of 65 who are not disabled but unemployed

- **Most Vulnerable Population** (n=125)
  - People who meet all the target population criteria

### Demographic Characteristics

- Overrepresentation among Wayne County respondents
- Slightly more female respondents (~60%), non-white respondents
- Roughly a third of respondents represented each target group
OnHand Target Populations

Two-thirds of respondents (65%) represent target populations:
- People above the age 65
- People who are unemployed
- People with a disability

How Target Populations Travel in Southeast Michigan

- They are primarily dependent upon fixed route services and driving themselves (73%)
- They rely more on low cost options (e.g. friends/family) before opting for for-hire/private services
- Two-thirds (65%) take more than 5 trips per week
- They travel less often than the overall sample—the most vulnerable respondents travel the least frequently
Traveler Satisfaction in Southeast Michigan

- Most are pleased or usually pleased with their transportation options (76%)
- ADA paratransit service riders report the highest levels of satisfaction compared with other services
- For each target group, Wayne County respondents are least satisfied across all services
- People that travel more often experience lower levels of satisfaction

Transportation Challenges and Barriers

- >Half of all respondents (56%) have difficulty with trips; two-thirds among target groups (66%)
- Medical and shopping trips represent the greatest need
- Finding rides on weekends and evenings, and identifying available services are the most common barriers among all groups
- Riders struggle with walking to/from bus stops and calling and scheduling rides—especially among the most vulnerable
ONHAND SURVEY EXECUTIVE SUMMARY

Technology Access and Use

• Majority have access to a computer and/or a mobile phone (82%)
• Roughly half use a personal computer or mobile device to purchase goods and services
• Less than half of target groups have reliable access to a personal vehicle
• Among those without access to a vehicle, use of technology for purchases decreases with age

ONHAND SURVEY ANALYSIS

Potential Strategies to Address Identified Needs

• Leverage technology and/or apps to improve the rider experience in finding services, scheduling, and paying for service.
• Provide real-time information and extended service hours to simplify services and schedules.
• Broaden eligibility for certain trip types to accommodate more travel throughout the region.
• Travel training could help with scheduling rides and increasing awareness about available services.
REGIONAL PRIORITIES – EXERCISES

NEEDS AND GAPS EXERCISES

Goals

• Obtain input from providers and others on needs
• Determine which areas are less critical
• Establish priorities for strategy development
• New: COVID-19 discussions
NEEDS AND GAPS EXERCISES

Progress

• TWG: March 31 meeting
  o 14 participated in prioritization

• WATS Transportation Coordinating Committee (TCC): April 17
  o 13 participated in prioritization

• Detroit Local Advisory Council (LAC): May 19

• SMART Advisory Council: June 19 (tentative)

NEEDS AND GAPS - TOPICS

TWG Exercise Results

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### Priorities and Concerns

- Funding was the most common top concern
- Other top-ranked concerns: improving coordination among providers, expanding service, and improving infrastructure
- Improving technology for trip planning and strengthening regional connections were most common 2nd ranked priorities

### Comments

- Our population is aging, and many are in areas without good service
- Older adults’ children have moved away, increasing the need for door-through-door service
- We need to ease the scheduling process
- Our current fare structure is upside down
### NEEDS AND GAPS - TOPICS

#### WATS LAC Exercise Results

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#### WATS TRANSPORTATION COORDINATING COMMITTEE

**Priorities and Concerns**

- Funding was the most common top concern, with year-to-year fluctuations an ongoing challenge.
- Other top-ranked concerns: improving regional connections and the need for more service, particularly to fill gaps.
- Improving technology and increasing coordination among providers were most common 2nd ranked priorities.
Comments

• With COVID-19, the need to retrofit vehicles to protect drivers and riders is seen as paramount
  o Can we join forces to collectively purchase protective equipment?

• There’s always uncertainty about losing funding, but there’s more confusion now [during pandemic], particularly about 5310 funding

• Dual county service is a struggle

• Our technology needs don’t align well with what’s out there
SOUTHEAST MICHIGAN – NEEDS, GAPS AND GOALS

Sources of information

- Previous HST plans
- Technical analyses
- User survey
- Prioritization exercises
- Other input from TWG and interviews

NEEDS, GAPS AND GOALS

Inventory of Needs

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INCREASE REGIONAL AND LOCAL MOBILITY

Macomb, Oakland and Wayne

128 communities in 3 counties

No Service, 12

Operating Locally Funded Programs, 40

Participating In SMART CPP, 76

48 HST Service Providers
- 31 participate in CPP
- 17 locally supported

Most use MDOT and FTA funds

In addition to ADA Paratransit and SMART Connector Services
(Shuttles & Dial-a-Ride programs)

INCREASE REGIONAL AND LOCAL MOBILITY

Washtenaw County

- Smaller HST network overall with fewer providers
  - Gold Ride, FlexRide, NightRide
  - WAVE Bus
  - People’s Express
- Less service coverage
- Less fragmented, but opportunities for coordination exist
- Few connections to rest of Southeast Michigan
  - Especially HST network
INCREASE REGIONAL AND LOCAL MOBILITY

• Equity and spatial gaps – inconsistent across Southeast Michigan
  o Employment and population is concentrated in Wayne and Oakland Counties
  o HST service gaps most pronounced in City of Detroit, where need is high
  o Connections between Washtenaw, Oakland and Wayne counties (and Macomb)
  o Rural Southeast Michigan also faces service gaps (Western Oakland and parts of Washtenaw)

• Service gaps
  o Weekend and evening services
  o Access to health care
  o Information and access (calling and scheduling)

• Good coverage, but service is “thin”
  o Services limited by operating hours and/or vehicles

• HST Service coordination is mixed
  o Some collaboration, but still a lot of independent operations
  o Complicated system - difficult to use, operate and fund
  o Likely inefficient
  o Limited connections between networks

• Increased opportunities/importance in wake of COVID-19 pandemic
  o Public health restrictions and requirements
  o Economic recovery
ADDRESSING GAPS AND NEEDS

Strategies and Options

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers

INCREASE REGIONAL AND LOCAL MOBILITY

Opportunities

• Move towards regional community transportation network

• Adjust services so they are better aligned with needs
  o Weekends, evenings
  o Geographic gaps
  o Support employment and economic recovery

• Ensure system is easy to understand, use and operate

• Reduce overall cost of service, reduce inefficiencies and redundancies

• Serve more riders and strengthen community support
POTENTIAL STRATEGIES – MOBILITY AND COORDINATION

1. Tie network together with “core” operating practices and definitions
   - Common eligibility
   - Set core service days and hours
   - Consistent fare policies and structures (including transfers, payment media)
   - Rules for transfers between services, including fixed routes

2. Tie ADA Paratransit services with common practices and definitions
   - Consistent eligibility and rider policies
   - Fare payment methods (in progress)

3. Integrate local demand response services with SMART ADA Paratransit
   - Use Community Transportation Network to provide ADA paratransit trips

4. Create performance measurement framework
   - Shared performance measures, definitions and reporting
   - Tie to funding (SMART CPP, MDOT Specialized Funding and 5310)
   - Benchmark to regional standards or national peers

5. Develop regional branding and marketing information / systems
   - Retain local branding, but use consistent colors, fonts and symbols
   - Tie to mobility management / information systems

6. Establish “centers of excellence” for service delivery functions
   - Branding/marketing
   - Technology
   - Service delivery models
   - Volunteer driver programs
## POTENTIAL STRATEGIES – MOBILITY AND COORDINATION

7. **Address temporal needs (evenings and weekends)**  
   - Create regional program for low demand times  
     - Rotating “on call” service  
     - Meet need with vouchers and flexible services (or potentially volunteer driver program)

8. **Address geographic inequities**  
   - Expand non-ADA demand response services in Detroit  
   - Deploy different service delivery models (vouchers, free fare programs, travel training)

9. **Develop regional capital plan for HST services**  
   - Vehicles  
   - Fare media  
   - Passenger information systems

## Comments and Discussion

- Best, worst, indifferent?  
- Additional strategies
### NEEDS, GOALS AND STRATEGIES

#### Next Steps

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Address Infrastructure Needs

Detail strategy recommendations

---

### STRATEGY FRAMEWORKS
STRATEGY FRAMEWORKS

1-2-page summaries

• Overview of need

• Implementation elements
  o Description
  o Timeframe
  o Level of difficulty
  o Investment needed

• Example best practice

• Considerations due to COVID-19

Sample Strategy Sheet Dashboard

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Sample Strategy Sheet

A brief overview of the strategy and target market

Narrative description of what problem or need exists, how this need was identified

More detail about strategy components (e.g., where, how, who, when)
**STRATEGY FRAMEWORKS**

**Sample Strategy Sheet**

Summary of where this strategy was successfully implemented elsewhere and key outcomes

Call out box with provider considerations given COVID-19 impacts

Dashboard to summarize level of difficulty, scope, timeframe, and champion(s)

---

**NEXT STEPS**
NEXT STEPS

• Identify strategies in line with needs
  o Information
  o Funding
  o Infrastructure

• Create strategy profiles for mobility and coordination

• Moving towards draft plan

• Next TWG Meeting is Tuesday June 16

THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
AGENDA

• Welcome and Introductions
• Update on Project Schedule / Status
  o 5310 Program Management
  o Stakeholder Engagement
• Plan Goals and Strategies
• Pilot Project
• Next Steps
COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Project Objectives

• Understand specific needs associated with target populations
  o Older adults
  o Persons with disabilities
  o Individuals with low incomes

• Develop a framework to strengthen existing coordination efforts

• Use process that is consistent with the federal requirements
5310 PROGRAM MANAGEMENT

Status and Next Steps

- Based on comments from three direct recipients, team is preparing draft subrecipient oversight and monitoring plan using tiered approach
  - Sort subrecipients into peer groups
  - Monitoring for those less at risk for compliance issues will be streamlined
- Circulate for review and comment among direct recipients
- Present to TWG in July
- Update PMP
- Prepare supporting materials to be used in next call for projects

COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN

Upcoming Project Meetings

<table>
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<th>Meeting Schedule</th>
<th>Planned Agenda Items</th>
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| August 4         | Draft 5310 Program Management Plan Coordinated Strategies  
                  • Present additional strategies  
                  • Ranking and rating  
                  Pilot Project – draft Recommendations |
| September 8      | Final 5310 Program Management Plan Draft Final Coordinated Plan  
                  • Prioritize strategies  
                  • Review/discuss final plan  
                  Pilot Project – next steps |
| October 20       | Final Coordinated Plan  
                  Pilot Project |
TECHNICAL MEMOS

RTA Website

• https://rtamichigan.org/regional-coordinated-human-services-plan-aka-onhand/

• Available Materials
  o TWG Meeting Presentations
  o Existing Conditions
  o Transportation Provider Inventory
  o Funding Inventory
  o User Survey Analysis

ONHAND PRIORITIES AND GOALS
## RECENT OUTREACH ACTIVITIES

### Prioritization and Presentation Meetings

- **WATS Transportation Coordinating Committee (TCC):** April 17
  - 13 participated in prioritization
- **Detroit Local Advisory Council (LAC):** May 19
  - Very well attended zoom meeting
- **SMART Advisory Council:** June 19
  - Zoom webinar presentation of project status
- Follow-up sessions this Fall

### Frequent and Common Sentiments

- Funding fluctuations
- Regional connections (cross-county)
  - Eastern Washtenaw to western Wayne
- Need for more service coverage
- Improving technology for some smaller carriers
- Increasing coordination

### COVID-19

- Needs to retrofit vehicles to protect drivers and riders
- Service is coming back with enhanced protective measures
- Opportunity (need) for coordination on standards, equipment, methods
- Uncertainty about losing funding
NEEDS, GOALS AND STRATEGIES

OnHand Goals

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Develop Partnerships for Supportive Physical Infrastructure

Rank the Plan Goals

Go to www.menti.com and use the code 42 59 9

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Develop Partnerships for Supportive Physical Infrastructure
Q1. Rank the Plan Goals (1 - Highest to 5- Lowest priority)

1st: Increase Local and Regional Mobility
2nd: Improve Coordination Among Providers
3rd: Streamline Funding, Reporting and Performance Measures
4th: Increase Awareness of Existing Services
5th: Develop Partnerships for Supportive Physical Infrastructure
NEEDS, GOALS AND STRATEGIES

Proposed Goals

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Develop Partnerships for Supportive Physical Infrastructure
NEEDS, GOALS AND STRATEGIES

Proposed Goals

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Develop Partnerships for Supportive Physical Infrastructure

INCREASE AWARENESS
INCREASE AWARENESS

Strategy Goals

Community members understand travel choices
  - What’s available
  - Differences between services
  - How to use them (plan, book and pay)

Community members know how to learn more (about travel options)
  - Where to go to ask questions (local and regional resources)
  - Simple, easy and accessible
  - Multiple formats for different user types

How We Know

- Southeast Michigan has a large and complicated network of providers
  - Some 50 providers in Oakland, Macomb and Wayne Counties
  - An additional 3-4 existing in Washtenaw
    - Doesn’t include non-profit organizations

- Providers have unique eligibility requirements, schedules and scheduling/reservation methods

- AAA 1-B (myride2) provides consolidated information and assistance, but challenges remain

- Users said “identifying available services” as top concern
INCREASE AWARENESS

Why it is Important

• Mismatch between services and needs
  o Services exist to provide ride, but
  o Under funding/lack of resources mean many services don’t advertise

• Make sure people can get where they want to go
  o Easier to learn about service
  o Easier to use the services

INCREASE AWARENESS

Strategies and Solutions

1. Regional branding and marketing
2. Mobility management and travel training
3. MyRide2 provider database enhancements
4. Improved trip planning tools

Key Considerations: Technology

• Information improvements are associated with technology, specifically app-based solutions
• Increased effectiveness, especially for individuals with disabilities
• Existing SMART branding on some vehicles
• Mobility management focuses on teaching users about technology
• Less effective for most vulnerable populations (aged 85+, low income and disabled)
INCREASE AWARENESS

Regional Branding and Marketing

• Creates “umbrella” brand to link services
  o Share some, but not all, brand elements for example
    ▪ Consistent schedule formats
    ▪ Local service name
    ▪ Regional logo and color scheme

Mobility Management and Travel Training

• Simplify/streamline myride2
  o Consistent description of service characteristics that can be easily updated
  o Specific portals for clients and human service professionals

• Ongoing train the trainer program
  o Designed with human service professionals in mind
  o Fixed route services
  o Local human service transportation
  o Technology (plan, book, and pay)
INCREASE AWARENESS

**MyRide2 Provider Database Enhancements**

- Current design
  - Zip code-based search
  - Can filter on door-to-door, accessible, etc.
  - Click for more details and contact provider (or MyRide)

- Enhancements improve quality of results

- Integrate scheduling capabilities
  - Technically possible today, but not done

**Improved Trip Planning Tools**

- Goal: enhanced trip discovery – being able to see and understand available choices
  - Show full menu of available transit services (fixed route and demand response)
  - Serve specific trip needs (destinations, time of travel vs. service hours)

- Platform: Open Trip Planner
  - Use available open source software
  - Integrate into myride2
INCREASE AWARENESS

Rate the Strategies

Go to www.menti.com and use the code 42 59 9

1. Create regional branding and marketing
2. Improve mobility management and travel training
3. MyRide2 provider database enhancements
4. Improved trip planning tools
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Strategy Goals

• Communities have safe and accessible ways to get around on foot.
• Specific focus on safe and accessible paths to bus stops and local destinations.
• Older adults, people with disabilities and people with low income know about safe paths and comfortable bus stops.
  o Sidewalks
  o Crosswalks (and curb cuts)
  o Bike paths
  o Benches and Shelters
• Information about walking paths must be accessible.
• 5310 funding is not sufficiently to support most projects and strategies.
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

How We Know

• Transportation providers:
  o Must provide “driveway to driveway” service because people can’t wait outside house
• In survey riders said they struggle with:
  o Walking to/from bus stops
  o Making first mile/last mile connections
• Riders also said they like fixed-route transit, but can’t always use it or would use it more if they were more comfortable

Why it is important

• Critical to fixed route transit services
• Fixed route services are lowest cost, highest efficiency service. They also maximize flexibility for rider
• In June 2020 (COVID-19) – from public health perspective – walking is safest mode for many riders
• Benefits local and regional mobility
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Strategies and Solutions

- Home ramp subsidy program
- Safe routes for seniors
- Bus stop and station accessibility
- Key destination mapping
- Mobility hubs

Key Considerations: Emphasis on Partnerships

- Outside of direct influence of transportation providers
- Projects have different (i.e. non-transit) funding programs
- Partnerships strengthen all partners

PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Home Ramp Subsidy Program

- Provides funding for people to build accessibility ramps at their homes
  - Access ramp facilities transportation
  - Expands options for many riders

Potential Partners

- Some insurance providers sometimes, including Medicaid and Medicare
- U.S. Department of Housing and Urban Development
- Area nonprofits
- Job corps/America corps
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Safe Routes for Seniors

- Make changes to physical environment to include seniors and people with disabilities

Potential Partners
- Senior housing facilities
- Senior centers
- Community based organizations
- Local municipalities

PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Bus Stop and Station Accessibility

- Identify bus stops that are inaccessible and remove barriers
- Encourage use of fixed route transit, reduce use of ADA paratransit

Potential Partners
- Transit agencies
- Local municipalities
- Disability rights organizations
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Key Destination Mapping

- Crowd source information to create accessible paths
  - People with disabilities and seniors report travel experiences
  - Highlight quality and consistency
  - Provide up-to-date information on accessibility of key pathways

Potential Partners
- Disability rights organizations
- People with disabilities (and seniors)
- Local municipalities

PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Mobility Hubs

- Hub for transportation resources
  - Fixed route transit
  - Bikes/bike share
  - Scooters
  - Car share
  - Uber/Lyft pick up/drop off

Potential Partners
- Local and regional municipalities
- Transit agencies
- Private sector partners
PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Rate the Strategies

Go to www.menti.com and use the code 42 59 9

- Home ramp subsidy program
- Safe routes for seniors
- Bus stop and station accessibility
- Key destination mapping
- Mobility hubs

Q3. Rate the Strategies

- Home Ramp Subsidy: 3.6
- Safe Routes to Seniors: 3.9
- Bus Stop and Station Accessibility: 4.3
- Map Key Destinations: 2.9
- Mobility Hubs: 3.9
PILOT PROGRAM

PILOT PROJECT

Opportunity

• Coordinated Plan process includes funding for pilot
  o Pilot should reflect needs identified in OnHand project
    ▪ Regional in nature
    ▪ Focused on older adults, persons with disabilities and persons with low incomes
    ▪ Led by RTA
  o Implementation/development in 2020 – launch 2020 or 2021
  o Funding suggests capital or technology, not service
PILOT PROJECT

Next Step

• Develop framework for selecting pilot
**NEXT STEPS**

- Complete strategy “booklets”
  - Increase Local and Regional Mobility
  - Improve Coordination Among providers
  - Streamline Funding, Reporting and Performance Measures
- Share draft ideas with wider group of stakeholders
- Develop framework for selection pilot
- Moving towards draft plan

- *Next TWG Meeting is Tuesday August 4*

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**COORDINATED HUMAN SERVICE PUBLIC TRANSIT PLAN**

**Upcoming Project Meetings**

<table>
<thead>
<tr>
<th>Meeting Schedule</th>
<th>Planned Agenda Items</th>
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</thead>
<tbody>
<tr>
<td>August 4</td>
<td>Draft Final 5310 Program Management Plan</td>
</tr>
<tr>
<td></td>
<td>Coordinated Strategies</td>
</tr>
<tr>
<td></td>
<td>• Present additional strategies</td>
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<tr>
<td></td>
<td>• Ranking and rating</td>
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<tr>
<td></td>
<td>Pilot Project – draft Recommendations</td>
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<tr>
<td>September 8</td>
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<td>Pilot Project</td>
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</table>
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
AGENDA

• Welcome and Introductions
• Update on Project Schedule / Status
• 5310 Program Management
• Transportation Equity and OnHand Coordinated Planning Process
• On Hand Coordination Strategies
• Pilot Project
• Next Steps
Project Objectives

• Understand specific needs associated with target populations
  o Older adults
  o Persons with disabilities
  o Individuals with low incomes

• Develop a framework to strengthen existing coordination efforts

• Use process that is consistent with the federal requirements
## Upcoming Project Meetings

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5310 PROGRAM MANAGEMENT

Draft plan for subrecipient oversight/monitoring and technical assistance

• Procedures include comments on draft PMP from direct recipients and call with theRide in May

• Risk-based, tiered approach based on theRide’s monitoring practices
  o Assess subrecipients’ risk of noncompliance with federal, state requirements
  o Sort into Low, Medium, High risk categories
  o A streamlined level of oversight for Low, Medium risk organizations

5310 SUBRECIPIENT OVERSIGHT

Risk-Based Approach

• Determine subrecipient’s risk of noncompliance
  o At time of 5310 award
  o RTA and direct recipients

• Rating on 10 factors:
  o Experience with federal/state grants, experience with 5310 grants
  o Experience of management staff, turnover, business environment complexity
  o Timeliness of document submission, response to questions
  o Financial and asset management procedures and controls
  o Ability to contribute matching funds
  o Legal issues
5310 PROGRAM MANAGEMENT

Monitoring

• Low/Medium risk subrecipients
  o One in-depth compliance review during term of 5310 agreement
    ▪ Desk review followed by site visit
  o Annual desk reviews of policies, procedures and documents
    ▪ Information gathered via questionnaire

• High risk subrecipients
  o Annual desk review (questionnaire) and site visit

• Subrecipients monitored by direct recipients

• Regional subrecipients monitored by RTA

• Monthly, quarterly, and annual reporting by subrecipients

• Annual summary report of oversight highlights to RTA

Site Visits

• Discuss policies and procedures
• Inspect vehicles
• Review records
  ▪ Driver training
  ▪ Drug/alcohol testing
  ▪ Insurance
  ▪ Vehicle maintenance

5310 PROGRAM MANAGEMENT

Technical Assistance

• Pre-application workshops, online meetings, one-on-one application review (RTA)

• Assistance during project implementation for new subrecipients or address noncompliance issues (Direct recipients, RTA)

• Mentoring of new subrecipients by more experienced providers
5310 PROGRAM MANAGEMENT

Next Steps

• Compile comments on oversight plan
• Define reporting requirements
• Update draft PMP to reflect all comments to date
• Prepare materials to assist with 2021 call for projects

TRANSPORTATION EQUITY
DEFINING TRANSPORTATION EQUITY

The fair distribution of transportation costs, resources, and benefits.

Horizontal Equity
Between individuals and groups with equal abilities and needs

Vertical Equity
Favoring economically, socially, or physically disadvantaged groups.

Coordinated HST focuses on vulnerable populations and examines the root causes of transportation needs and available services.

APPLYING AN EQUITY LENS IN COORDINATED PLANNING

Equity can be applied at all stages of the coordinated planning process:

Technical analysis and service inventory
- Examine demographic trends, location of employment centers relative to communities of color and identify the root causes of mobility needs.
- Use data collected by communities (if possible).

Planning and strategy development
- Target engagement, strategy, equity analysis, and funding decisions to people that depend on or use human service transportation

Implementation
- Ensure target populations are in decision-making seats of power to advise/provide oversight to strategy implementation; if not, reconsider different ways to engage

Outcomes and performance indicators
- Eliminate gaps among low-income communities, communities of color, and provide transportation operating subsidies that support improved mobility
ADVANCING EQUITY

A mix of programmatic and structural solutions:

- Match resources to the greatest needs
  - Regionwide fare-capping for low-income riders

- Address service deserts
  - Flexible vouchers/subsidies

- Increase access to opportunities
  - Shared on-call service delivery for evenings and weekends, and reverse commute rideshare program

- Support and incentives for 5310 recipients
  - Technical assistance, preferential scoring for projects that serve disadvantaged communities, demographic data collection

UPDATE ON STRATEGIES AND GOALS
ONHAND COORDINATED PLAN STRATEGIES

5 Goals

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding, Reporting and Performance Measures
5. Develop Partnerships for Supportive Physical Infrastructure

Developing Strategies

• Document is a DRAFT
• Total of 29 strategies organized around goals
  o About 14 reviewed at last TWG meeting
• Updated and expanded based on comments and stakeholder discussions
  o RTA
  o SMART
  o PEAC (Programs to Educate all Cyclists)
  o Foenix Rising
ONHAND COORDINATED PLAN STRATEGIES

What’s Changed
• Clearer language
• Increased focus on transportation equity
• Increased focus on persons with disabilities, including cognitive disabilities
• Better / more integration of ADA Paratransit Pilot Project

ONHAND COORDINATED PLAN STRATEGIES

What’s New
• Make Cross Border Travel Easier
• Additional Commuter Programs
• Transit Fare Capping
• Alternative ADA Service Delivery Models
• Safe Routes for Seniors/Safe Routes for All
• Create Funding Packages for Community Transportation Services
• Regional Eligibility Assessment and Travel Training Center
• Common ADA definitions and terms (plus communication, i.e., conditional eligibility)
ONHAND COORDINATED PLAN STRATEGIES

Next Steps

• TWG Member Review
  o DRAFT strategy report distributed 7/30
  o Comments requested by August 14
    ▪ If easier, contact us in person
  o Update strategies based on comments

• TWG prioritization exercise September 8th

PILOT PROGRAM
PILOT PROJECT

Opportunity

• On Hand includes opportunity for pilot
  o Pilot should reflect needs identified in OnHand project
    ▪ Regional in nature
    ▪ Focused on older adults, persons with disabilities and persons with low incomes
  o Implementation/development in 2020 – launch late 2020 or 2021
  o Estimated funding pot ~$400,000

PILOT PROJECT

Approach

• Identified a handful of potential options
• TWG indicate priorities
• Conduct additional research / definition
  o Scope/Scale
  o Partnerships
  o Costs
### POTENTIAL PILOT PROJECTS

<table>
<thead>
<tr>
<th>Technology / Software</th>
<th>Services</th>
<th>Planning</th>
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<tbody>
<tr>
<td>• Purchase scheduling software for Community Transportation Providers (SMART CPP + independent and nonprofit)</td>
<td>• Pilot Flexible Voucher Program – offer subsidy to older adults and persons with disabilities</td>
<td>• Initiate planning for Regional Paratransit Eligibility Assessment and Travel Training Center</td>
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<tr>
<td>• Update/expand functionality of MyRide2 webpage (Mobility as a Service)</td>
<td>• Pilot Flexible Voucher Program – offer subsidies to support Job Access and Reverse Commute trips</td>
<td>• Other</td>
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<td>• Expand Mobility as a Service pilot to City of Detroit (1-year project)</td>
<td>• Expand travel training program (potential focus on technology)</td>
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### PILOT PROJECT

**Rank the Pilot Project Categories**

Go to [www.menti.com](http://www.menti.com) and use the code 92 84 95

1. Technology/Software
2. Services
3. Planning
What type of project do you think is most important?

1st | Technology/software
2nd | Services
3rd | Planning

Results from the Menti Poll (August 4)
PILOT PROJECT

Prioritize the Pilot Project Concepts

Go to [www.menti.com](http://www.menti.com) and use the code 92 84 95

1. Technology/Software
   - Purchase scheduling software for CPPs and independent/non-profit providers
   - Expand myride2 website functionality (MaaS)
   - Expand MaaS to the City of Detroit for 1-year

2. Services
   - Pilot flexible voucher program for older adults/persons with disabilities
   - Pilot flexible voucher program for job access/reverse commute
   - Expand travel training program (e.g., focus on technology)

3. Planning
   - Initiate planning for a Regional Paratransit Eligibility Assessment and Travel Training Center

---

Go to [www.menti.com](http://www.menti.com) and use the code 92 84 95

Which three (3) pilot projects would you prioritize?

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<th>Top Pilot Priorities</th>
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Which three (3) pilot projects would you prioritize?

Results from the Menti Poll (August 4, 2020)

NEXT STEPS
ONHAND CHSTP

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Hold handful of scheduled virtual workshops  
• Present study findings  
• Share access to study files  
• Recommendations and next step (pilot) |
| TWG Meeting October 20 | Final Coordinated Plan  
Pilot Project |

NEXT STEPS

• Finalize OnHand Strategies  
  o TWG comments  
  o Extend Equity Lens  
  o Polish/refine  
  o Prepare for prioritization exercise  
• Recommendations for pilot projects  
• Outreach/Share Draft findings  
  o TWG member ideas for engaging community groups  
  
  • Next TWG Meeting is Tuesday September 8
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonygaard.com
AGENDA

• Update on Project Schedule / Status
• 5310 Program Management
• On Hand Coordination Strategies
  o Engagement and Sharing Draft Recommendations
• Pilot Project
• Next Steps
Project Objectives

- Understand specific needs associated with target populations
  - Older adults
  - Persons with disabilities
  - Individuals with low incomes

- Develop a framework to strengthen existing coordination efforts

- Use process that is consistent with the federal requirements
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# 5310 PROGRAM MANAGEMENT PLAN

## Project Development and Selection

- Regional CHSTP – RTA
  - Evaluate needs of target populations, identify strategies/projects and priorities
  - Direct recipients
  - Stakeholders

- Regional call for projects – RTA
  - Technical assistance prior to submission – RTA and/or direct recipients
  - Selection committee – RTA, direct recipients, other key stakeholders
  - Selection criteria – need and benefits, coordination and partnerships, project readiness
  - Highly competitive projects – extra points for projects advancing regional priorities

## MANAGEMENT AND ADMINISTRATION

- Regional PMP – RTA
- Contracting with subrecipients and coordinating payments – direct recipients
- Subrecipient compliance oversight – direct recipients
  - Risk assessment of each successful applicant
  - Combination of assurances obtained from grant applications, desk reviews, regular reporting by subrecipients, and site visits
    - Notes in each subrecipient’s file
  - Annual summary of oversight activities – direct recipients to RTA
**SCHEDULE FOR DEVELOPMENT OF POP**

- Project selection committee meets two months in advance of call for project – late in calendar year
  - Discuss selection process, annual goals and funding priorities
- Regional call for projects – early in the next calendar year
- Project selection, draft POP – first quarter
- POP public comment – managed by SEMCOG; second quarter?
- Regional split of 5310 funds – spring or early summer
- Subrecipient awards – summer

**5310 PROGRAM MANAGEMENT**

**Next Steps**

- Finalize oversight plan
- Finalize PMP document to reflect all comments to date
- Prepare materials to assist with 2021 call for projects
ONHAND STRATEGY DEVELOPMENT AND PRIORITIZATION

ONHAND COORDINATED PLAN STRATEGIES

5 Goals

1. Increase Local and Regional Mobility
2. Improve Coordination Among Providers
3. Increase Awareness of Existing Services
4. Streamline Funding and Reporting
5. Develop Partnerships for Supportive Physical Infrastructure
ONHAND COORDINATED PLAN STRATEGIES

Strategy Prioritization Survey

Top-Scoring Strategies

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<tbody>
<tr>
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<td>• Bus Stop and Station Accessibility</td>
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<td>• Regional Coordinating councils Service Standards for Community Transportation Providers</td>
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<td>• Regional Capital Plan</td>
<td>• Mobility Hubs</td>
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Goal 1. Increase Local and Regional Mobility

Strong support for:
• Improved Cross Border Travel,
• Maintain Existing Services, and
• Transit Fare Capping

Answered: 13  Skipped: 0
ONHAND COORDINATED PLAN STRATEGIES

Strategy Prioritization Survey

Goal 2. Improve Coordination Among Providers

- Support spread more broadly among strategies.
- Many strategies in this category are dependent upon one another.

ONHAND COORDINATED PLAN STRATEGIES

Strategy Prioritization Survey

Goal 3. Increase Awareness of Existing Services

- Strongest support for MyRide2 Provider Call Center and Database Improvements
- Followed by Mobility Management and Travel Training Enhancements
ONHAND COORDINATED PLAN STRATEGIES

Strategy Prioritization Survey

Goal 4. Streamline Funding and Reporting

• Strongest support for Regional Fare Integration

• Followed by Regional Capital Plan

Goal 5. Develop Partnerships for Supportive Physical Infrastructure

• Strongest support for Bus Stop and Station Accessibility

• Followed by Mobility Hubs

• Safe Routes for Seniors/Safe Routes for All was also highly ranked
### Strategy Prioritization Survey

#### Pairing Strategies
- **Regional Coordinating Councils** (2.1) is a pre-requisite for many strategies:
  - Service Standards for CTP (2.2),
  - Shared Regional Tech Investments (2.4),
  - Shared Scheduling and Traveler Information Technologies (2.5),
  - Regional Branding and Marketing (3.1),
  - Demand Response Transportation Integration with Trip Planning Tools (3.4),
  - MyRide2 Provider Call Center and Database Improvements (3.5),
  - Performance Measurement System (4.1))

| 2.4 | Shared Regional Tech Investments | Related: Aligned ADA Policies and Practices (2.3) |
| 2.5 | Shared Scheduling and Traveler Information Technologies |
| 1.1 | Make Cross Border Travel Easier | Related: Flexible Voucher/Subsidy Program (1.2) |
| 5.2 | Safe Routes for All | School-Based Travel Training (3.3) |
| 3.2 | Mobility Management and Travel Training Enhancements | Regional Eligibility Assessment and Travel Training Center (5.6) |
| 2.7 | Regional Capital Plan (4.2) | Vehicle Pooling Among Providers |
ONHAND COORDINATED PLAN STRATEGIES

Next Steps

- Share Recommendations with wider audience
  - TCCs/LCCs and other stakeholder groups
  - 15-20 minutes on existing agenda
  - Schedule 2 “Virtual Town Halls”
    - Late September (September 29 and 30?)
      - Hour long, late afternoon meeting
      - Invite stakeholders and people contacted
      - Advertise on RTA webpage and through social media
      - Help from TWG members
<table>
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<tr>
<td>• Findings from Meetings and Town Hall</td>
</tr>
<tr>
<td>• Additional comments from TWG</td>
</tr>
</tbody>
</table>

| PILOT PROGRAM                      |
## PILOT PROJECT

### Opportunity

On Hand includes pilot/demonstration project

- TWG providing input on the opportunities
- Key criteria for evaluation
  1. Focused on older adults, persons with disabilities and persons with low incomes
  2. Regional in nature
  3. Consider equity
  4. Ease of implementation

### Opportunities

1. Regional Eligibility Assessment and Travel Training Center Stage 1: Mobile Unit
2. Regional Eligibility Assessment and Travel Training Center Stage 2: Facility Planning
3. Flexible Voucher/Subsidy Program
4. Mobility Management and Travel Training Enhancements
5. Shared Scheduling Technology
6. Myride2 Enhancements: Project Support
REGIONAL ELIGIBILITY ASSESSMENT 
AND TRAVEL TRAINING CENTER

Opportunity

- Near term: a mobile assessment and outreach unit
- Medium term: establish a regional eligibility assessment and travel training center for Southeast Michigan

MOBILE ASSESSMENT AND OUTREACH UNIT

Pilot Program Goals and Costs

Conduct ADA paratransit eligibility assessments and offer travel training with mobile unit

Estimated cost: $155,000 – 225,000

- Vehicle: $140,000-200,000
- Equipment: $15-25,000
- Use existing staff: 2-4 trainers/assessors
REGIONAL ELIGIBILITY ASSESSMENT AND TRAVEL TRAINING CENTER

Facility for transit agencies, demand response providers, and their customers to conduct interviews and assessments for ADA paratransit eligibility

Estimated cost: $150,000
  - Feasibility/planning study: $150,000
  - Build facility: $8-9 Million

RTC of Southern Nevada Mobility Training Center (MTC)

GOAL 5: DEVELOP PARTNERSHIPS FOR SUPPORTIVE PHYSICAL INFRASTRUCTURE

Pilot Program Goals and Costs

FLEXIBLE VOUCHER / SUBSIDY PROGRAM

<table>
<thead>
<tr>
<th>Level of Effort</th>
<th>Scope</th>
<th>Cost</th>
<th>Timeframe</th>
<th>Champion</th>
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<tbody>
<tr>
<td>High</td>
<td>Agency</td>
<td>$$$</td>
<td>Medium</td>
<td>DDOT</td>
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<td></td>
<td></td>
<td>Long-term</td>
<td>SMART</td>
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<td>TheTale</td>
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</tbody>
</table>

Opportunity
- Subsidize trips for older adults and people with disabilities
- Can be used with taxis and ride hailing companies
- Reduce cost for ad hoc, unscheduled trips

GOAL 1: INCREASE LOCAL AND REGIONAL MOBILITY
FLEXIBLE VOUCHER / SUBSIDY PROGRAM

Pilot Program Goals and Costs

• Improve access to medical and shopping
• Reduce transportation barriers for high need riders
• Guide future investments in public transit

Estimated cost: $400,000
  o $350,000 in trip subsidies
  o $50,000 for program management
  o Subsidy of $12/trip yields roughly 29,000 trips

GOAL 1: INCREASE LOCAL AND REGIONAL MOBILITY

MOBILITY MANAGEMENT AND ENHANCED TRAVEL TRAINING PILOT

Opportunity
• Develop, provide, and maintain consistent information and training resources
• Helps people with disabilities and older adults use fixed route and demand response transportation

GOAL 3: INCREASE AWARENESS OF EXISTING SERVICES
MOBILITY MANAGEMENT AND ENHANCED TRAVEL TRAINING PILOT

Pilot Program Goals and Costs

- Create regional mobility management program
- Regionwide travel training and “Train the Trainer” program
- Fund mobility manager for every OnHand county and the City of Detroit
- Findings shape further investments

Estimated Cost: $300,000-400,000
  - Funding for mobility manager costs

GOAL 3: INCREASE AWARENESS OF EXISTING SERVICES

SHARED SCHEDULING TECHNOLOGY

Opportunity

- Identify and adopt an open source scheduling platform
- Increases operational efficiency
- Shared technology will make it easier to share information and book trips

GOAL 2: IMPROVE COORDINATION AMONG PROVIDERS
SHARED SCHEDULING TECHNOLOGY

Pilot Program Goals and Costs

- Develop pilot with up to four initial agencies
  - Purchase system and provide training
  - 5-Year cost: $185,000 (4 providers)
- Join existing contract to test concept
  - Partner with existing agency (Utah Transit Authority (UTA))
  - Lower cost way to test concept
  - 5-Year costs $90,000

GOAL 3: INCREASE AWARENESS OF EXISTING SERVICES

MYRIDE2 IMPROVEMENTS

Pilot description

- Expand and improve MyRide2 with ability to plan, book and pay for trips
- Make MyRide2 easier to use and more accessible
### MYRIDE2 IMPROVEMENTS

**Pilot Program Goals and Costs**

- Simplify process to plan, book and pay for trips
- Adds reporting and account management functions
- Estimated cost for project: $290,000
  - $90,000 fr
  - Plus an additional $200,000 for software development cost would in addition

### GOAL 3: INCREASE AWARENESS OF EXISTING SERVICES

### SUMMARY OF PILOT OPTIONS

<table>
<thead>
<tr>
<th>Option</th>
<th>Cost Estimate (Range)</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional eligibility assessment and travel training center: mobile unit</td>
<td>$155,000-$225,000</td>
<td>Phase 1 of Regional Approach</td>
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<tr>
<td></td>
<td></td>
<td>Assumes use of current staff</td>
</tr>
<tr>
<td>Regional eligibility assessment and travel training center: facility planning</td>
<td>$150,000</td>
<td>Phase 2 of Regional Approach</td>
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<tr>
<td></td>
<td></td>
<td>Feasibility Assessment for longer-term investment</td>
</tr>
<tr>
<td>Flexible voucher/subsidy program</td>
<td>Up to $400,000</td>
<td>Would support up to 29,000 trips at $12/trip</td>
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<tr>
<td>Mobility management and travel training enhancements</td>
<td>$300,000-$400,000</td>
<td>Hire 5 full-time mobility managers</td>
</tr>
<tr>
<td>Shared scheduling technology</td>
<td>$90,000-$185,000</td>
<td>Option to piggyback on existing provider license</td>
</tr>
<tr>
<td>MyRide2 enhancements: project support</td>
<td>$290,000</td>
<td>Includes software and project management</td>
</tr>
</tbody>
</table>
NEXT STEPS

• Pilot Projects
  o Send out project descriptions for feedback
  o Accept comments until 9/30

• OnHand Strategies and Draft Recommendations
  o Share findings and recommendations
    ▪ LCCs/TCC meetings
    ▪ Virtual Town Halls
  o Update draft recommendations

• Prepare Coordinated Plan

• Next TWG Meeting TBD
THANK YOU!

Bethany Whitaker
857.305.8003
bwhitaker@nelsonnygaard.com
AGENDA

• Update on Project Schedule / Status
• 5310 Program Management
• Draft and Final Report
• Next Steps
Project Objectives

- Understand specific needs associated with target populations
  - Older adults
  - Persons with disabilities
  - Individuals with low incomes
- Develop a framework to strengthen existing coordination efforts
- Use process that is consistent with the federal requirements
5310 PROGRAM MANAGEMENT

5310 PROGRAM MANAGEMENT PLAN

Project Development and Selection

- Regional CHSTP – RTA
  - Evaluate needs of target populations, identify strategies/projects and priorities
  - Direct recipients
  - Stakeholders

- Regional call for projects – RTA
  - Technical assistance prior to submission – RTA and/or direct recipients
  - Selection committee – RTA, direct recipients, other key stakeholders, including representatives of disadvantaged communities or organizations that serve them
  - Selection criteria – need and benefits, coordination and partnerships, project readiness
    - Additional criteria to address transportation inequity
  - Highly competitive projects – extra points for projects advancing regional priorities
    - Priorities could include addressing transportation inequity or serving disadvantaged communities

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ONHAND
MANAGEMENT AND ADMINISTRATION

• Regional PMP – RTA
• Contracting with subrecipients and coordinating payments – direct recipients
• Subrecipient compliance oversight – direct recipients
  o Risk assessment of each successful applicant
  o Combination of assurances obtained from grant applications, desk reviews, regular reporting by subrecipients, and site visits
    ▪ Notes in each subrecipient’s file
  o Annual summary of oversight activities – direct recipients to RTA

SCHEDULE FOR DEVELOPMENT OF POP

• Project selection committee meets two months in advance of call for projects – late summer 2021 (August)
  o Discuss selection process, annual goals and funding priorities
• Regional call for projects – late in the calendar year (October; applications due November/December)
• Project selection, draft POP – first quarter 2022
• POP public comment – managed by SEMCOG and WATS; second quarter 2022?
• Regional split of 5310 funds – spring or early summer 2022
• Subrecipient awards – summer 2022
5310 PROGRAM MANAGEMENT

Next Steps

• Finalize details of PMP with RTA and direct recipients
• Prepare materials to assist with 2021 regional call for projects
ONHAND COORDINATED PLAN – DRAFT FINAL REPORT

- Review Federal Requirements
- Overview of Draft Final Report
- Focus on Executive Summary and Updates/Changes

Federal Direction

- Projects selected for funding under FTA Section 5310 funding must be included in “a locally developed, coordinated public transit-human services transportation plan”
- Must include participation from:
  - Seniors
  - Individuals with disabilities
  - Representatives of public, private and nonprofit transportation and human service providers
  - Other members of the public.
- Analysis must include:
  - Transportation needs of individuals with disabilities, older adults and people with low incomes
  - Provide strategies to meet these needs
  - Prioritize transportation strategies for funding and implementation
- Plan is updated every 4 – 5 years
## Federal Direction: Stakeholder and Community Participation

<table>
<thead>
<tr>
<th>Stakeholder and Community Participation</th>
<th>TWG Meetings</th>
<th>Stakeholder Interviews</th>
<th>Surveys</th>
<th>Presentations/Meetings</th>
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<tr>
<td>Seniors</td>
<td>X</td>
<td>X</td>
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<td>X</td>
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<tr>
<td>Individuals with disabilities</td>
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<tr>
<td>Representatives of public, private and nonprofit transportation and human service providers</td>
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<td>X</td>
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<tr>
<td>Other members of the public</td>
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</table>

## Federal Direction: Planning Process

<table>
<thead>
<tr>
<th>Transportation needs of individuals with disabilities, older adults and people with low incomes</th>
<th>Market Analysis</th>
<th>User Survey</th>
<th>Funding Inventory</th>
<th>Service Inventory</th>
<th>Strategy Development</th>
<th>TWG Meetings</th>
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</table>


Federal Direction: Overview

Projects selected for funding under FTA Section 5310 funding must be included in “a locally developed, coordinated public transit-human services transportation plan”

• Broad set of strategies – allows for existing efforts to continue
  o Maintain Existing Services
  o Regional Capital Plan

• Also creates opportunities for new ideas and innovation
  o Fare capping
  o Shared Scheduling and Traveler Information Technology
  o Mobility hubs
  o Several strategies around increased collaboration and coordination

Report Outline

1. Introduction
2. Market Analysis
3. Transportation Services Inventory
4. Transportation Funding Inventory
5. Gaps Analysis and Unmet Needs
6. Strategies and Recommendations

• Appendices
  o 4 Tech Memos (Market Analysis, Service Analysis, Funding Inventory, Strategy Booklet)
  o Rider Surveys: Findings and Analysis
  o TWG Meeting Materials
  o Summary of Outreach Activities
ONHAND COORDINATED PLAN – DRAFT FINAL REPORT

Executive Summary

• Summary of Approach, Findings and Recommendations
  o Project Goals
  o Overview of Coordinated Planning Process
  o COVID-19 and Transportation Equity
  o Mobility Challenges
  o Strategies (Table)
  o Action Plan

Transportation Equity

Updates since DRAFT Report was sent

• Expanded section to include “Advancing Equity” from previous memos – highlight ways to specifically address inequities:
  • Conduct coordinated planning at a regional level
  • Increase funding in service poor areas
  • Track impact of services on racial minorities and low-income individuals
  • Target marketing and outreach efforts to most disadvantaged members of target population especially Black and other people of color
  • Fare capping
ONHAND COORDINATED PLAN – DRAFT FINAL REPORT

Transportation Equity

Proposed updates for 5310 Project Applications

- Request information about racial, ethnic and economic characteristics of their community
- Projects that serve disadvantaged communities or address issues of transportation inequity are deemed "highly competitive projects" and receive additional points during 5310 scoring

ONHAND COORDINATED PLAN – DRAFT FINAL REPORT

Action Plan

1. Regionalize management and administration of Section 5310 Program
2. Increase coordination among sub-regional and municipal based providers. Open to how this happens, but highlights potential to:
   - Use existing efforts including regional fare coordination, passenger information systems, paratransit booking app, and schedule software updates
   - Advance regional equity by measuring outcomes
3. Align existing ADA programs and policies – potential ideas
   - Consistent definitions and correspondence
   - Work towards consistent eligibility standards
   - Shared regional eligibility and travel training program
NEXT STEPS

PILOT PROJECT

Potential projects

• Regional eligibility assessment and travel training center
  o Starting with a mobile unit
  o Planning for a regional facility

• Flexible voucher/subsidy program

• Mobility management and travel training enhancements

• Shared scheduling technology

• Myride2 enhancements
PILOT PROJECT

• Lots of Ongoing Regional Initiatives
  o Regional Paratransit Booking App
  o Washtenaw County Ride@50+
  o SMART ADA Paratransit Software Procurement
  o Regional Fare Work

• Regional initiatives will impact pilot priorities
• Hold off for results to identify critical needs

FINAL REPORT

• Draft Materials
  o Comments on Draft Final Report by 11/20 – after report is updated, it will be final
  o 5310 Draft Program Management Plan will be sent to direct recipients shortly for comment

• Final Report by 12/4
• Plan Update every 4-5 years
  o Consistent with Long Range Transportation Plan/Metropolitan Transportation Plans
  o 2024 review/update, not full planning process
THANK YOU!

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857.305.8003
bwhitaker@nelsonnygaard.com