

MEMORANDUM

April 24, 2013

TO: Planning, Housing, and Economic Development Committee  
Health and Human Services Committee

FROM: Linda McMillan, Senior Legislative Analyst   
Vivian Yao, Legislative Analyst 

SUBJECT: **FY14 Operating Budget: Senior Transportation**

***Those expected for this worksession:***

Uma Ahluwalia, Director, Department of Health and Human Services  
Gabe Albornoz, Director, Department of Recreation  
Pofen Salem, Office of Management and Budget  
Deborah Lambert, Office of Management and Budget

As a part of his FY14 recommendations for the Senior Initiative, the County Executive has made several changes and improvements to senior transportation which will be reviewed at this session.

This issue has been of importance to the Council which assigned this issue to Senior Fellow Elaine Binder. The HHS and T&E Committee's had a joint session on February 4<sup>th</sup> to hear Ms. Binder's findings and recommendations regarding current services and moving the county to a mobility management model. The packet from the February session is attached at © 6-33.

Ms. Binder has also compiled a table of FY13 transportation funding (from all sources) that either funds senior transportation programs or programs that serve seniors and other targeted populations (such as Call 'N Ride). The table is attached at © 1.

Attached at © 2 is a listing of the FY14 grant requests that are related to senior transportation. These items are handled through the grants process and are not before the joint Committee for decisions at this time.

Also attached at © 3-5 is the budget recommendation from the Commission on Aging which references several of these items.

***1. Add Mobility Management Administrator  
\$60,000 and 0.0FTEs***

The Executive's recommendation is to add \$60,000 for a contract for a Mobility Management Administrator. The budget says the resources will "develop a countywide Mobility Management System (MMS) that can leverage other resources and coordinate them to meet the transportation needs of low and middle-income older adults in Montgomery County. The funds will also result in the development of a strategic marketing communications plan to publicize transportation programs to seniors which will leverage existing county resources for implementation."

On February 4, 2013 the HHS and T&E Committees held a joint meeting on senior transportation where they reviewed the report from Senior Fellow Elaine Binder on Senior Transportation and Mobility Management System. Ms. Binder's report has several recommendations with the top two priorities being to: (1) Create a formal mobility management position capable of working collaboratively with all departments with senior transportation programs, as well as nonprofit and for profit transportation providers. One responsibility for this position would be to convene a network of providers to identify solutions; and 2) Develop a strategic communications and marketing plan with the outcome of increasing awareness of existing services.

The Commission on Aging has voiced its support for a Mobility Management System Coordinator as a county position, rather than a contractor and recommends an additional \$47,000 for funding for such a full-time position.

The Commission on People with Disabilities stated its support for the Executive's recommendation but asks that the position's duties also include transportation for people with disabilities.

The Grassroots Organization for the Well-being of Seniors (GROWS) supports full funding for a mobility management program, but does not specify an amount of funding.

**Council staff agrees with Senior Fellow Binder that the responsibilities of a Mobility Manager would be best accomplished with a position within County Government rather than a contractor.** The information included in the February packet notes that Mobility Managers are policy coordinators and a broker of transportation services. The person in this position needs to be able to convene county department staff as well as county contractors and community partners and should also help to develop and frame the outreach effort that would be coordinated with the Public Information Office. **If the joint Committee recommends a position, Council staff will work with Executive staff to clarify the type of position. However, the Commission on Aging recommends funding associated with a Manager III that would have a cost of \$107,064. Council staff recommends the joint Committee place \$47,064 on the reconciliation list to fund the Mobility Manager as a position in place of the \$60,000 contract.**

**2. Enhance The Escorted Transportation Pilot Project Contract for a Full-year  
\$55,000 and 0.0FTEs**

This is an annualization of the program that is funded in FY13. The funding is provided to the Jewish Council for the Aging of Greater Washington to provide a "Smooth Ride" escorted transportation pilot program. The FY13 effort is expected to fund 550 one-way escorted trips. An escorted trip provides the person with assistance in and out of the car and into the appointment. Often this kind of transportation is used to help seniors to medical appointments. This is different from the Connect-a-Ride program that is funded in the Department of Transportation (\$237,497 for FY14).

**Council staff recommends approval. Council staff also recommends that the Council receive a written update on this effort next January, after the program has been operation for a full year that would include the number of people served, the average length of the trip, the average cost, and any information on the incomes of those served.**

**3. Add Jewish Council for the Aging Senior Transportation Partnership Starting January 2014  
\$318,750 and 0.0FTE (Department of Recreation)**

***Shift Charges for Senior Transportation Services (previously DOT charged DHHS)  
-\$142,500 and 0.0FTE (Health and Human Services)***

The Executive's Recommended budget says (page 69-1), "Starting January 2014, initiate a Senior Transportation Project with the Jewish Council for the Aging (JCA) for senior transportation services to be provided to the Long Branch, Holiday Park, Margaret Schweinhaut, White Oak, and Damascus Senior Centers. This will be a flexible, fixed-route senior bus service in local neighborhoods with limited door-to-door pick-up and drop-off for most-in-need riders. Projected costs are based on six hours per day per center, Monday through Friday, 50 weeks per year beginning January 2014. The project will also provide centralized coordination of bus service that includes senior's direct telephone access to JCA during regular business hours."

The Executive branch has also provided the following information:

The current Department of Transportation services, providing no-charge transportation to four Senior Centers will be discontinued and replaced by a more flexible combined fixed-route and customer-request no-charge service to the five existing Senior Centers including Damascus, Holiday Park, Long Branch, Schweinhaut, & White Oak. This will be accomplished through a partnership with the existing transportation office of the JCA. Their operation currently has capacity to administer and transport a similar number, plus some growth factor, as the current system which is approximately 768 riderships/month based on DOT records. The Department of Recreation anticipates that ridership will increase w/ the addition of the 5<sup>th</sup> site and due to the greater flexibility of the smaller individual buses and elimination of time conflicts with the RideOn vehicles, previously used. At the current time, Senior Center programs are not planned to be altered based on this transportation upgrade, although additional attendance is expected.

This will be evaluated after the first year of the new effort. Funding for this initiative will be located in the Department of Recreation.

The JCA program will be serving the five senior centers. This is an overall improvement because currently there is not service to the White Oak Center. The DHHS will continue to transfer money to DOT to provide transportation service to the smaller neighborhood centers.

Council staff believes that the budget display is somewhat confusing because it appears there is a "reduced cost" to Health and Human Services which may imply that there is reduced funding for transportation to senior and neighborhood centers. Council staff understands that the total FY14 budget for transportation to senior and neighborhood centers is \$684,250.

\$365,000 for services provided by DOT  
\$318,750 for JCA Senior Transportation Project  
\$684,250 Total Funding

\$508,000 FY13 Funding (all service provided through DOT)  
\$176,250 Increase in funding for FY14

**Council staff recommends approval.**

**4. Add Senior Mini Trips Starting in January 2014  
\$25,120 and 0.12FTE**

The Executive is recommending funding to arrange quarterly mini-trips to activities and events in the metropolitan Washington and Baltimore areas that will originate from the five Senior Centers and the 55+ active adult recreation programs. Before the economic downturn, the Recreation Department provided this type of programming. There will be a fee for participants which the Recreation Department expects to keep in the \$8 to \$10 range. **Council staff recommends approval.**

**5. Increased Cost of Seniors Ride Free Program because of WMATA reported ridership increase  
\$49,020 and 0.0FTEs**

This item is not identified in the Senior Initiative. WMATA estimates the amount owed by the county and then periodically updates the charge to the County for lost revenue based on actual ridership. This item will be reviewed by T&E Committee as a part of Transit Services.

FY13

Sources of Funds for County Transportation Programs

Program	SOURCES OF FUNDING				
	Federal/State	County			
		HHS	DOT	Grant	
Connect-a-Ride			\$147,774		
Senior Connection		\$103,430			
Senior Connection/shopping (Federal)*	\$53,938				
Escorted-JCA**		\$55,000			
Escorted/Public Gardianship-JSSA		\$20,000			
Escorted/Public Gardianship - Wintergrowth		\$2,500			
Escorted/Public Guardianship - various		\$4,500			
Recreation Centers/ Ride On***		\$508,000			
Shopping***		\$65,000			
Federation Driver training****				\$25,000	
Call 'N Ride (State)****	\$379,000		\$4,071,228		
Medicaid (State)*****	\$3,526,720				
Minus cost of Free Ride On Transportation - Muslim Foundation		\$41,200	\$704,154		
<b>sub total/county Funds</b>		<b>\$799,630</b>	<b>\$4,923,156</b>	<b>\$25,000</b>	
Less income from Call 'N Ride User Fees			\$429,980		
<b>Final Total of County Funding</b>		<b>\$799,630</b>	<b>\$4,493,176</b>	<b>\$25,000</b>	<b>\$5,317,806</b>
<b>Total - Federal/State and County</b>	<b>\$3,959,658</b>				<b>5,317,786</b>
*Red Cross was orginally funded to provide this; however, they did not want to continue					
** 6-month contract; begun in January 2013					
*** County funding to HHS; funds transferred to DOT					
**** Community Grant Process					
***** have been unable to ascertain the number of seniors in either Call 'N ride or Medicaid programs					

1

# FY 14 Senior Transportation Requests

Organization	Project Description	Amount	Category	Program Area	Recommendation	Comments
Montgomery County Muslim Foundation, Inc.	driver, adm staff, and office expenses for transportation for low income elderly & frail Muslim residents	\$110,000	op./ ≥2005	older adults / people with disabilities	\$55,000	
Olney Home for Life	expenses for volunteer senior transportation and support services	\$20,732	op./ ≥2005	older adults / people with disabilities	\$15,000	
The Hebrew Home of Greater Washington, Inc. (dba Charles E. Smith Life Communities)	handicapped accessible van	\$46,000	sm. cap./ <2005	older adults / people with disabilities	\$46,000	
The Jewish Federation of Greater Washington, Inc.	expenses for Community Transportation Project	\$50,000	op./ <2005	older adults / people with disabilities	\$35,000	will serve non-seniors as well
The Muslim Community Center, Inc.	purchase and operate a handicap equipped shuttle van for the clinic	\$50,000	large cap.	health / behavioral health	\$50,000	will serve non-seniors as well
<b>Total</b>		<u>\$276,732</u>			<u>\$201,000</u>	

C.E.

20



COMMISSION ON AGING

Montgomery County Commission on Aging

FY14 Budget Statement

1. The Commission on Aging thanks the Council for adopting a vision for seniors in its resolution for a “Community for a Lifetime: a Senior Agenda.” This framework now needs to be implemented, and the County Executive’s FY14 budget is a step in this direction.
2. The gap between needs and resources remains immense. By the year 2020 (less than 7 years away), and since 2000, the senior population of Montgomery County will increase by 74%, with approximately one-in-four residents age 60 or better. This tremendous demographic shift requires a new priority for senior issues in order for all our residents to age with dignity and vitality.
3. The additional funds proposed in the FY 14 Budget are positive steps:
  - Increased investment in affordable housing and continued funds for senior housing units in Silver Spring.
  - Seniors will welcome the enhancements in transportation, particularly the public-private partnership to expand senior transportation and also restore the senior mini-trip program to the 5 senior centers, as well as the addition of a position for a Mobility Management System coordinator.
  - Added funding for Home Delivered Meals will eliminate the waiting list.
  - Increased funding for the Library and Recreation budgets will help address the problem of senior isolation.
  - Funding for a senior citizen fire educator contractor will speak to the fire dangers faced by seniors.
4. To continue to close the gap between needs and resources, there are 4 particular enhancements that we urge the Council to pursue:
  - Funding a position for a “Village Coordinator” would help establish and strengthen neighbor to neighbor programs throughout the county, a cost effective way to meet a variety of needs by bringing together our citizens in helping one another, particularly our senior citizens. Representatives of local villages told the Commission that social isolation was one of the biggest challenges to providing services for individuals in need. A “Village Coordinator” could help bridge this gap and support coordinated outreach efforts, and the development of new “Villages” in low/moderate income areas of the County. (\$85,755)

**Department of Health and Human Services**

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401 Hungerford Drive, 4th Floor, Rockville, Maryland, 20850 240-777-1120, FAX 240-777-1436  
[www.montgomerycountymd.gov/hhs](http://www.montgomerycountymd.gov/hhs)

Program Manager II - job class 000832 -1.0 FTE	
Personnel Costs	77,735
Infrastructure	
OTO - Includes Computer, Furniture, Desk phone, smart phone	6,400
Ongoing OE - desk phone, smart phone	1,620
Operating Costs	8,020
Total Cost	85,755

- Funding is needed for printed materials on transportation, mental health, and safety. Many seniors lack computer access and depend on written material for information. Older adults who are unaware of county transportation options, or health and wellness programs, and how to access them, are isolated in their homes. Printed materials at libraries, grocery stores and places of worship would inform and assist older adults in diverse communities as they seek to access county services. The Commission also recommends multi-language publications and a one-time mailing to those turning age 65 providing information on resources. (\$30,000)
- **The mental health challenges of seniors need additional funds for the Senior Outreach Team (SORT) contract that aids homebound seniors with therapy and for care-giver support and respite care.** More than 25% of those 65+ live alone; isolation fuels depression. The burdens on families trying to cope with depression and anxiety or Alzheimer’s disease are formidable and the problem is growing. (respite care at \$15/hour \$90,000 to provide 6,000 hours of respite care and SORT contract to serve an additional 28 homebound seniors \$60,000).
- **The senior foster care program needs additional support as there has been no rate increase in 20 years.** This program takes care of seniors and younger adults with disabilities needing help and supervision and who have no family to turn to, and 60 percent of participants are seniors. Other County programs reimburse assisted living facilities at a higher rate for the same services. (\$310,000)

This funding would be phase one of a two-year commitment to increase Adult Foster Care subsidy rates by \$620,000. This will increase the average monthly subsidy by \$475 for 145 seniors to be equal to the rates provided in the Senior Assisted Living Group Home Subsidy Program. DHHS is having difficulty in placing individuals into assisted living group homes of 5-8 residents due to this subsidy difference.

- **Full funding for a Mobility Management System Coordinator.** While the current approach of budgeting for a contract is a very positive step in implementing a system of mobility management, we would like to see full funding of a County staff position. We believe that the stature of such a position would “have the authority” to foster closer collaboration between County-operated programs and private providers and ensure smoother coordination of all senior mobility and transportation services and programs. (an additional \$47,064).

The Mobility Management Coordinator will develop a county-wide Mobility Management System (MMS) that meets the transportation needs of low and middle-income older adults in Montgomery County. The MMS will –

- Meet individual customer needs through a wide range of transportation options and public and private transportation service providers
- Coordinate these services and providers in order to achieve a more efficient transportation service delivery.

The Administrator will be responsible for the coordination of services between 311, DOT/Transit Services, Recreation Department/Senior Programs, HHS, Regional Services Centers, nonprofit providers and taxi companies. The Administrator will convene a network of providers to identify solutions so that through collaborative efforts, innovative efforts to provide senior transportation will be developed.

Features of the County MMS will include -

- A centralized call center
- Individualized Guidance on Transportation options
- Individualized mobility training
- A Network of multiple services to serve a wide variety of needs
- A Network of diverse public and private sectors providers
- Service coordination
- Ongoing evaluation of service needs and provision

The incumbent will develop a strategic communications plan to intensify efforts to increase awareness of existing services using both print and electronic media and will expand outreach through presentations in venues where older residents live and/or gather. The Communication plan will also include an intensive volunteer driver outreach campaign, pedestrian safety, and continuing efforts to ensure safe driving by older adults.

Manager III - job class 000112	
1.0 FTE	
Personnel Costs	99,044
Infrastructure	
OTO - Includes Computer, Furniture, Desk phone, smart phone	6,400
Ongoing OE - desk phone, smart phone	1,620
Operating Costs	8,020
Total Cost	107,064

**M E M O R A N D U M**

January 31, 2013

TO: Transportation, Infrastructure, Energy & Environment Committee (T&E)  
Health and Human Services Committee (HHS)

FROM: Elaine Binder, Senior Fellow  
Linda McMillan, Senior Legislative Analyst *gone*

SUBJECT: **Senior Transportation**

***Expected for this session:***

Gabe Albornoz, Director, Recreation Department  
John Kenney, Ph.D., Chief of Aging and Disability Services, DHHS  
Carolyn Biggins, Chief, Division of Transit Services, DOT  
Judy Welles, Chair, Commission on Aging

At this session, the joint Committee will be briefed by Elaine Binder on the work she has completed to date as a Senior Fellow tasked with reviewing current senior transportation programs and making recommendations to improve senior transportation in the County. The presentation slides are attached at © 1-11. As background for the presentation, also attached are Ms. Binder's proposal for a Mobility Management System (© 12-16) and information about volunteer driver programs, bus transportation programs, and existing Mobility Management models in other jurisdictions (© 17-20). A definition of Mobility Management from *United We Ride\** is attached at © 21-23 and a discussion of Mobility Management Operations from *United We Ride* is attached at © 24-26.

Following the presentation, staff has asked Recreation Director Albornoz and Ms. Welles, Chair of the Commission on Aging, to provide comments to the joint Committee on the information, proposal, and recommendations.

The two priority recommendations are to (1) create a mobility management administrator position, and (2) develop a strategic communications and marketing plan. As noted on ©22,

\*United We Ride is a federal interagency initiative aimed at improving the availability, quality, and efficient delivery of transportation services for older adults, people with disabilities, and individuals with lower incomes.

mobility management differs from the traditional approach to transit services by (1) disaggregating service planning and markets in order to better serve individuals and the community, (2) focusing on service diversity and a “family of transportation services” matched to demographics and needs in order to reach a wide range of customers, (3) using multiple transportation providers to offer the most efficient and effective service to all individuals, and (4) underscoring the importance of service advocacy and service coordination for the individual’s needs. The information provided at © 3-4 says that while County transportation services have many strengths, including high quality services and relatively low or no costs to users, they are also fragmented, lack true cross-departmental coordination, and do not involve all possible providers or take into account geographic differences within the County.

In addition to the priority recommendations for a mobility management administrator and strategic communications and marketing plan, other recommendations include using Regional Service Centers as part of the planning and implementation process, expanding information and referral services and including options counseling as a part of these services, and exploring innovative approaches to providing transportation to senior centers and shopping.

**Council staff recommends that the joint Committee forward its comments and recommendations regarding this proposal to the County Executive so that he may consider them as a part of his FY14 Recommended Operating Budget.**

# Montgomery County

## Senior Transportation and Mobility Management System

### Our Aging Population

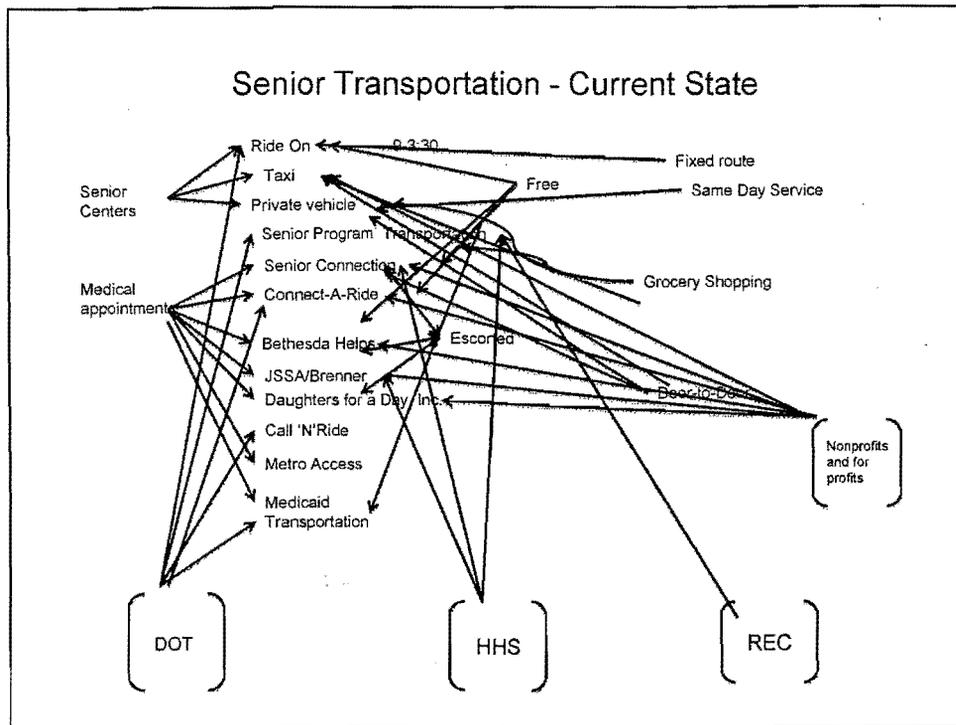
- Nearly 120,000 adults 65+ currently reside in Montgomery County, and in 2020 this population is expected to be 156,400.
- Older adults want to “age in place” – i.e., in the community.
- This is a very car-dependent community.
- There is no single age when people should stop driving.
- A lack of transportation has been described by older adults themselves as the most important barrier in their lives.

## Lack of Transportation Impacts Health and Well Being

- Isolation may lead to depression and decline.
- Infrequent grocery trips may result in unhealthy diet.
- Lack of preventive care may lead to more illness.
- Routine illnesses may become emergencies.
- Post hospitalization follow-up visits may be hard to schedule and keep.
- Chronic diseases may be harder to manage.
- Some older adults may leave the community prematurely for assisted living or nursing home care.
- The economic and psychological cost of lack of transportation is prohibitively high.

## Current Senior Transportation Services

- Connect-a-Ride: a free information and referral service run by the Jewish Council on the Aging (JCA).
- Call 'N' Ride: taxi discount coupon programs for low-income seniors and people with disabilities.
- Free Ride On and Metrobus: 9:30 – 3:00 am daily, and discounted fares on other hours.
- Senior Center Transportation Program: provides transportation to senior centers, nutrition sites and shopping.
- Senior Connection: provides free volunteer driver service, primarily for medical appointments; nonprofit organization funded by the County and contributions.
- Multiple private providers: curb to curb; door to door; door through door services.
- Escorted transportation: provided by JCA and Brenner Escort Service under contract with HHS.
- Metro Access: para transit for frail seniors and people with disabilities.
- Travel Training: provided by JCA through grants.
- Pedestrian and Older Driver Safety Programs.



- ### Strengths of Current System
- Provides high quality services
  - Makes an effort to address needs of older adults
  - Mix of public and private providers
  - Relatively low or no cost to users
  - Contains many of the elements needed to form a continuum of services

## Weaknesses of Current System

- Fragmented
- Cross-departmental without true coordination
- Services are not widely publicized
- The needs of many seniors are not being met
- Does not take into consideration geographic differences within the County
- Does not involve all possible providers
- Does not have a sliding fee scale to enable consumer participation in supporting services
- Does not include the wide range of possible additional programs and services

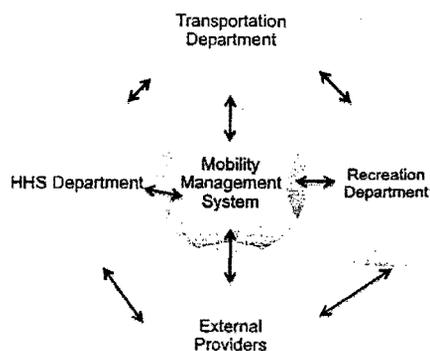
## What is Needed?

A Mobility Management System that meets the transportation needs of low and middle-income older adults in Montgomery County

## Mobility Management

- Meets individual customer needs through a wide range of transportation options and service providers.
- Focuses on coordinating these services and providers in order to achieve a more efficient transportation service delivery

## Senior Transportation - Proposed



## Mobility Management Systems

- Available when needed
- Accessible to various riders
- Acceptable standards of service
- Affordable for rider
- Adaptable to diverse needs of riders

## Mobility Management Includes

- One-click call center
- Options Counseling
- Network of multiple services to serve a wide variety of needs
- Network of diverse providers
- Service coordination
- Ongoing evaluation of service needs and provision

Our current services are the nucleus  
of a Transportation and Mobility  
Management System

## Recommendations

- Establish a mechanism within County Government to ensure smooth coordination of all senior transportation services and programs
  - Budget for a Mobility Management Position capable of working collaboratively with all public and private providers
  - Use Regional Service Centers as part of the planning and implementation process to reflect regional differences

## Recommendations

- Re-brand and market existing services.
  - Develop a strategic communications plan.
  - Intensify efforts to increase awareness of existing services using both print and electronic media.
  - Expand outreach through presentations in venues where older residents live and/or gather .

## Recommendations

- Expand information and referral services to include options counseling.
  - Ensure that both technology and resources are available to respond to increased volume.
- Expand volunteer driver programs.
  - Convene all volunteer driver program providers to explore ways to collaborate and coordinate services.
  - Develop and intensive volunteer driver outreach campaign.

## Recommendations

- Explore innovative approaches to providing transportation services to senior centers and shopping
  - Consider decentralizing the administration of these services
- Market the use of public transit and ensure its high quality
  - Expand free Ride On and Metrobus service to weekends.
  - Evaluate all aspects of the County's transportation efforts, including bus routes and maintenance of bus stops to ensure high quality service.

## Recommendations

- Develop a neighborhood shuttle program.
  - Convene providers of bus/van transportation to explore ways to collaborate and coordinate services.
  - Explore the feasibility of changing fixed route systems in areas with high senior populations to provide "shuttle services" during non-work-related hours.
- Expand escorted transportation programs and assist in developing affordable, sustainable business plans.

## Recommendations

- Identify additional efforts critical to an effective mobility management system including:
  - Convening a network of transportation providers to identify issues of concern and propose solutions.
  - Maintaining a priority on pedestrian safety.
  - Continuing efforts to ensure safe driving and transitions from driving to alternative transportation services.

## Recommendations

- Explore fee-based solutions using private providers
- Examine and develop creative ways to support services through user fees, donations, business support and partnerships.
  - Create opportunities for financial contributions by both service users and others in the community.

## Priorities

- Create mobility management administrative position
  - Primary responsibilities would include convening a network of providers to identify solutions.
- Develop strategic communications and marketing plan
  - Outcome would be increased awareness of existing services.

# *The Montgomery County Senior Transportation and Mobility Management System*

## Proposal

**Outcome: A Mobility Management System that meets the transportation needs of low and middle-income older adults in Montgomery County.**

### **Transportation Vision**

*Montgomery County will have public and private transportation and mobility systems that enable older adults to go where they want to go, when they want to go and how they want to get there.<sup>1</sup>*

The “Gold Standard” for a transportation system is what is known as “Mobility Management” – a strategic approach to service coordination and customer service that enhances the ease of use and accessibility of the transportation network. According to the Beverly Foundation, the following characteristics are the hallmark of a high quality transportation system.

- Service is **available** when it is needed: it is reliable, on time, and it meets the scheduling needs of riders; there is stability and dependability in the provision of services regardless of trip purpose.
- Service is **accessible** to the various riders: transportation options vary to accommodate need, and assistance is available as needed; bus schedules and signs are accurate and readable; vehicles come to the door; escorts are available for those with mental or physical limitations.
- Service has **acceptable** standards of service: riders understand what, when and how services are available and know how to use them; riders feel comfortable calling for rides and feel safe and secure using the service; rider training may be available to facilitate use of services; vehicles are clear; drivers are courteous and dependable.

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<sup>1</sup> From the Senior Agenda adopted by the Commission on Aging in September 2011, endorsed by the County Executive in March 2012, and by the County Council in December 2012

- Service is **affordable** for the rider: services are no cost or low-cost for those with limited incomes; there are vouchers or coupons to assist with out-of-pocket expenses; “senior days” exist to promote use of public transit.
- Service is **adaptable** to the diverse needs of riders: the system evolves to meet the changing needs of its passengers; partnerships are sought to maximize flexibility of the system; routes change as demographics change.

The current services provided by Montgomery County can be viewed as the nucleus of a Mobility Management System. Furthermore, many of the characteristics described by the Beverly Foundation exist in some form in the County’s service profile - Connect-a-Ride, which provides specific information about transportation options; the Call ‘N’ Ride program; free Ride On and Metrobus from 9:30 – 3:00 Monday through Friday and discounted rides at other times; a transportation program coordinated through the Departments of Transportation, Recreation and Health and Human Services to take seniors to senior programs, nutrition programs and shopping; Senior Connection whose volunteer drivers provide rides primarily to medical appointments; Brenner Escort Services whose drivers provide escorted trips to medical appointments; a contract with the Jewish Council on the Aging to provide escorted transportation for low-income residents; Metro Access for frail seniors and people with disabilities; and travel training conducted by Connect-a-Ride. However, there continue to be major gaps in both the continuum and characteristics of service delivery.

This paper presents a preliminary proposal that is designed to reframe current services as *The Montgomery County Mobility Management System*. It contains a series of recommendations that will lead to a comprehensive Transportation and Mobility Plan for low and middle-income older adults who live in Montgomery County. Incorporated into this must be an understanding of the needs and concerns of older adults from diverse communities and people with disabilities. To move from today’s transportation efforts to a comprehensive program will involve the commitment of key public and private players in the County in the development of a collaborative community transportation system.

## Recommendations

- Establish a mechanism within the County government to ensure smooth coordination of all senior transportation services and programs.
  1. Put in place a formal Mobility Management position capable of working collaboratively with all departments with senior transportation programs, as well as nonprofit and for profit transportation providers.
  2. Utilize the existing regional service centers as part of the planning and implementing process since there are considerable variations in needs in different parts of the County.
  
- Rebrand existing services as the nucleus of a Senior Mobility Management System.
  1. Develop a strategic communication plan to rebrand current senior transportation services as a ***Senior Transportation and Mobility Program*** (under some catchy name)
  2. Intensify marketing efforts to increase awareness of existing services.
    - a. Create a simple one-page description of key transportation services to be posted in libraries and buildings where older adults live.
    - b. Explore the feasibility of developing kiosks that contain easily accessible information about County services to be placed in shopping malls, libraries and community centers, etc.
    - c. Ensure that the County website contains up-to-date information about senior transportation.
  3. Expand outreach efforts through presentations at senior centers, housing facilities with significant numbers of older residents and other venues where older adults gather.
  
- Expand the capability of all transportation information and referral.
  1. Develop a detailed plan to expand services to include 'options counseling' (more in-depth counseling of callers) and direct assistance to help callers meet their needs.

2. Provide resources simultaneously for both the marketing effort and expanded capacity to handle the anticipated increased volume of calls.
  3. Ensure that technology is available to efficiently and effectively provide information to callers.
- Expand volunteer driver programs throughout the County.
    1. Identify strategies for an intense volunteer driver outreach program to expand the number of volunteer drivers, thereby increasing the capability of volunteer driver programs including volunteer bus drivers if appropriate.
    2. Ensure that technology is used to expand services.
    3. Convene all groups currently providing transportation using volunteer drivers to explore ways to collaborate and coordinate services.
  - Evaluate current transportation services to senior centers and shopping, and explore innovative approaches to expand this service.
    1. Develop a competitive process to determine the most effective way to both provide and expand existing services.
    2. Explore the feasibility of decentralizing the management of these services using technology that streamlines the matching process.
  - Market the use of public transit and ensure its high quality.
    1. Expand free Ride On and Metrobus service to weekends.
    2. Offer travel training throughout the County to increase public transit use.
    3. Evaluate all aspects of the County's transportation efforts, including bus routes and maintenance of bus stops to ensure high quality service.
  - Develop neighborhood shuttle programs, either charging a modest fee or requesting contributions, to take older adults to shopping centers and recreation facilities.
    1. Convene providers of bus/van transportation to explore ways to collaborate and coordinate services.
    2. Explore the feasibility of changing fixed route systems in areas with high senior populations to provide "shuttle services" during non-work-related hours.

- Expand escorted transportation programs and expect them to develop business plans that are both affordable to users and sustainable to operators.
  1. Analyze programs such as TRIP (where older adults recruit their own driver(s) and “reimburse” them a modest amount for gas through the TRIP Program) to determine the viability of such programs to support/complement existing efforts.
  2. Identify strategies to increase fiscal viability of escorted transportation.
  
- Identify additional efforts critical to an effective mobility management system. Included among these are:
  1. Convening on a regular basis a network of transportation providers to identify issues of concern and propose solutions.
  2. Maintaining a priority on pedestrian safety
  3. Continuing efforts to ensure safe driving and transitions from driving to alternative transportation services.
  
- Explore a range of fee-based solutions using private providers.
  
- Examine creative ways to support all existing services through user fees, donations, business support and partnerships.
  1. Create opportunities for financial contributions by both service users and others in the community in order to support this effort.

# Volunteer Driver Programs

- Senior Connection
  - 244 drivers serve 675 riders annually with 6000 one-way escorted trip at estimated cost \$24.97/rider. No fee for rider; contribution suggested.
- Neighbor Ride – Howard County
  - 340 drivers serve 420 riders annually with 12,000 one-way trips at estimated cost of \$14.86/rider. Rider fee ranges from \$5-33/trip.
- Olney at Home
  - 45 drivers provided 700 rides in 9 months. No fee.
- TRIP – Riverside, CA
  - Riders recruit their own volunteers and TRIP reimburses at \$.32/mile.
  - Served 864 people, providing 101,000 one-way rides at average cost/trip of \$6.90.

24  
17

# Bus Transportation Programs

- Montgomery County Senior Transportation Programs
  - Using Ride On buses, provides about 19,350 trips annually to senior centers/programs and shopping at average estimated cost of \$30/rider.
- Rockville Senior Center
  - With 5 buses provides 26,000 rides to Senior Center and 5000 grocery shopping rides at average cost of \$5.91/rider (fuel, parts, salary and benefits).
- Gaithersburg Senior Center
  - With 2 city buses, provide 6760 rides to the Senior Center at estimated average cost of \$3.65/rider (staff and gasoline, not maintenance).

25

26

# Mobility Management Models

- Dallas – One Stop Mobility Source
  - Mobility Manager coordinates Network of 90 providers (public transit; volunteer driver programs; private pay; consumers)
  - “My Ride” – one-on-one phone options counseling
- Fairfax County – operate on regional basis – 4 Regions
  - FASTRAN, now called Human Services Transportation Program: door-to-door to senior centers. \$1.50/day; Volunteer Program – escorted transportation (driver reimbursement \$.14/mile); Dial-a-Ride; “Seniors on the Go”- taxi voucher program
- Arlington County – “One Call-One Click” Call Center
  - Multiple services (shopping, medical appointments, senior centers) provided for low and moderate income residents
- King County, WA (Seattle)
  - Mobility Manager coordinates key programs
  - Community Van Shuttle – network of community partners; 500 volunteer drivers; 4000 rides annually/300 escorted rides/week to medical appointments; reimbursed at \$.45/mile
  - Hyde Shuttles – Transit Authority has 35 vans transporting seniors to senior centers; 1/3 are nutrition vans; remainder go through neighborhoods

# Mobility Management Models

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  - Hyde Shuttles – Transit Authority has 35 vans transporting seniors to senior centers; 1/3 are nutrition vans; remainder go through neighborhoods.
- E-Z Ride Community Cars – Bergen, Hudson & Monmouth Counties, NJ
  - Volunteer drivers provided 3000 rides in 2011. Riders pay \$15 membership plus ride fee (\$2.50 plus mileage fee). Fills gap between fixed-route, fixed schedule public transit and private services.
- Lima, Ohio
  - Mobility Manager coordinates coalition of transportation providers; Information and Referral; “Find-a-Ride” brokering services; Human Service Transportation providing rides to senior centers; Volunteer driver program through community partners.
- Wisconsin – Mobility Managers throughout the State
  - Primary responsibility is partnership building.
  - 75-90% of services charge a fee

## **Mobility Management - Defined** From *United We Ride*<sup>1</sup>

Mobility management is an innovative approach for managing and delivering coordinated transportation services to customers, including older adults, people with disabilities and individuals with lower incomes. Changes in demographics, shifts in land use patterns, and the creation of new and different job markets require new approaches for providing transportation services, particularly for customers with special needs. Mobility management focuses on meeting individual customer needs through a wide range of transportation options and service providers. It also focuses on coordinating these services and providers in order to achieve a more efficient transportation service delivery system for public policy makers and taxpayers who underwrite the cost of service delivery.

Mobility managers serve as policy coordinators, operations service brokers and customer travel navigators.

- As policy coordinators, mobility managers help communities develop coordination plans, programs and policies, and build local partnerships. They also work to promote land-use policies that favor transit-oriented development, public transportation and pedestrian access.
- As brokers, they coordinate transportation services among all customer groups, service providers and funding agencies.
- As travel navigators, they work with human service agencies and/or workforce centers that coordinate the travel and trip planning needs of individuals who receive human service program assistance.

Mobility management activities are eligible to receive funding under SAFETEA-LU (Safe, Accountable, Flexible and Efficient Transportation Equity Act: A Legacy for Users). Mobility management is an eligible capital expense under most U.S. Department of Transportation (USDOT) Federal Transit Administration (FTA) programs (5307, 5310, 5316, 5317, and 5318). This means FTA can fund 80 percent of mobility management expenses. SAFETEA-LU also affords a new option to use non-DOT transportation funding or service contracts to meet matching requirements. The law defines mobility management as “short-range planning and management activities and projects for improving coordination among public transportation and other transportation service providers.”

Mobility management activities eligible for SAFETEA-LU funding include:

- Operating transportation brokerages to coordinate service providers, funding resources, and customer needs;
- Coordinating transportation services for older adults, individuals with disabilities, and individuals with low incomes;

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<sup>1</sup> **United We Ride (UWR)** is a federal interagency initiative aimed at improving the availability, quality, and efficient delivery of transportation services for older adults, people with disabilities, and individuals with lower incomes. The United We Ride initiative was started by the **Coordinating Council on Access and Mobility (CCAM)**, a federal interagency council established by President George W. Bush by Executive Order in 2004

- Supporting local partnerships that coordinate transportation services;
- Staffing for the development and implementation of coordination plans;
- Providing travel training and trip planning activities for customers;
- Developing and operating traveler call centers to coordinate travel information, manage eligibility requirements, and arrange customer travel; and
- Planning and implementing the acquisition and purchase of intelligent transportation technologies to operate a coordinated system.

The mobility management approach differs from traditional transit services in several ways:

- Mobility management disaggregates service planning and markets in order to better serve individuals and the community. Traditional transit service planning aggregates demand on centralized, highly traveled routes of a transit system.
- Mobility management focuses on service diversity and a “family of transportation services” to reach a wide range of customers versus traditional transit systems that are built on the principle of unified regional service coverage.
- A “family of transportation services” is a wide range of travel options, services and modes that are matched to community demographics and needs.
- Mobility management uses multiple transportation providers to offer the most efficient and effective service to all individuals. Traditional transit agencies typically use a single operator to deliver all services.
- Mobility management underscores the importance of service advocacy as a way to improve public transportation management and delivery. A mobility manager acts as a travel agent/service coordinator to seek the most effective means for meeting an individual’s transportation needs. Transit agencies generally focus on the direct provision of services.

### **Getting Started and Measuring Progress**

Meeting the transportation needs of the community is no easy task, but it can be done if transportation providers, human services and workforce investment agencies, and the community work together to plan and implement services. Mobility management involves these key steps:

- Developing an inventory of available services;
- Identifying customer needs;
- Developing strategies to meet needs;
- Coordinating financial and other resources;
- Improving coordination through transportation brokerage systems;
- Training staff and volunteers;

- Promoting the use of innovative technologies, services, and other methods to improve customer service and coordination; and
- Developing customer information and trip planning systems.

## **Mobility Management Operations** *From United We Ride*

This section discusses two areas within the subject of human services transportation operations. These include Mobility Managers and Service Configurations. Mobility management is an approach for managing and delivering a network of coordinated transportation services. Service configurations are various mechanisms or means by which transit services are provided. Information about these two subjects is presented below. At the end of the section on operations are links to documents, organizations, and other resources that provide additional information on mobility managers and transit service configurations.

### **Mobility Managers**

Mobility management is an approach to service development and management that focuses on individualized customer markets and involves establishing a variety of services tailored to meet the needs of those markets. It also entails a responsibility for establishing a coordinated service delivery network to achieve connectivity for customers and efficiency for taxpayers. Finally mobility management encompasses the design and management of the transportation infrastructure so that the services developed can perform effectively and efficiently. Mobility management has the following characteristics that distinguishes it from traditional transit service development

- Disaggregated rather than aggregated service planning. Traditional transit service planning involves traffic flow analyses, origin and destination studies, travel corridor planning, especially high capital intensive investment planning. It involves aggregating demand on centralized, highly travel routes which are interconnected into a transit system. Under the mobility management concept, the transit agency disaggregates markets, seeks to understand the individualized needs of those markets and designs service strategies to effectively meet those needs.
- Service diversity rather than service uniformity. Most transit systems are built on a principle of unified regional service coverage. A grid of interconnected fixed routes covers the region. The transit system provides no service choices - only one service offering. Mobility management involves the development a network of multiple services to serve a wide variety needs.
- Multiple rather than a single provider. Most transit systems have a single transit operator that directly delivers all service. Under the mobility management arrangement, the agency looks to broker service to the most efficient and effective provider. The result is a transit network of diverse providers rather than a single transit system.
- Service advocate rather service provider. Transit agencies generally focus on the direct provision of service delivery. Under mobility management, the agency views

itself as a travel agent seeking the most effective strategy for meeting service needs and as a service coordinator seeking to the most effective and efficient conditions for service delivery. This means the mobility managers may be advocates for improved traffic management practices, transportation regulatory reform, more responsive infrastructure design and complementary land use policies that support effective public transportation delivery and public mobility.

There are several levels of mobility management, which are the following:

- Level 1. Internal Mobility Management - The transit agency seeks to diversify its own in-house line of transit service products.
- Level 2. External Mobility Management - The transportation agency works to coordinate the services of multiple agencies or seeks to establish new institutional coordination arrangements (e.g., brokers and coordinates social service agencies; creates transportation management associations (TMAs) or develops business shuttles).
- Level 3. Institutional Advocacy – The agency works to improve institutional arrangements favorable to the delivery of better public transportation (e.g., regulatory changes, traffic management, and land use controls).
- Level 4. Infrastructure Design and Management – The agency participates with those involved with the development and management of the civil infrastructure network to ensure that the infrastructure developed to permit efficient and effective delivery of the customer-based services.

While the traditional transit service will continue to be the backbone of our public transportation systems, demographics shifts, changing job markets, and suburban and exurban land use patterns all mean that new approaches are called for if transit is to remain a vital part of solving the nation's passenger transportation needs. Sole reliance on the traditional radial suburban to downtown transit systems limits transit patronage and results in a falling market share of passenger trips.

New paradigms are called for in responding to new markets. The adoption of mobility management institutional arrangements, the application of disaggregated, market-based service planning approaches and the use of new technologies like intelligent transportation systems (ITS) that make individualized services possible are all combining to make such a customer-based transit paradigm shift possible.

### **Service Configurations**

Public transportation service configurations are the various transportation service types, or mechanisms or ways by which public transportation and special transportation services are provided, including human services transportation. Some service configurations may have a subset of configurations (e.g., fixed-route service). Examples of public

transportation service configurations include, but are not limited to, fixed-route service (local, express, feeder, circulator, etc.), paratransit or demand response service, flex-routes, volunteer drivers / private vehicles, and accessible taxis.