



Plumas County Transportation Commission

Mobility Management Feasibility Study

FINAL REPORT

June 2011



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This project was funded to Plumas County by the California Department of Housing and Community Development. The project is administered by the Plumas County Community Development Commission and uses Community Development Block Grant (CDBG) funds appropriated through the U.S. Department of Housing and Urban Development.

Chapter 1. Executive Summary

Previous planning efforts have identified Mobility Management as a potential strategy for addressing unmet public transportation needs in Plumas County. This report summarizes the key elements of Mobility Management as they relate to community transportation services in Plumas County, identifies the service needs and opportunities for a future Mobility Management Center (MMC), and presents strategies and implementation actions to initiate MMC development.

Agency Assessment Findings

The project team conducted an agency assessment survey and held a Transportation Provider Workshop in order to recognize potential partner organizations, identify availability of administrative and technological capacity and overlapping services, and pinpoint specific opportunities and barriers to better coordinate transportation services. The network of providers in Plumas County can be characterized as having:

- A widespread interest in mobility management;
- Strong but informal inter-organizational relationships;
- Limited technology deployment;
- Low administrative and capital capacity; and
- Limited financial resources.

Recommendations

Plumas County public transportation providers are in a position to address public transportation needs by implementing a variety of mobility coordination tactics. At the same time, a number of proven mobility management strategies are available to take advantage of the organizational opportunities and strengths identified among the Plumas County providers. While local partners currently lack the funding and a structural framework to develop and operate a full-service MMC, they possess the skills and desire to start implementing elements of a robust Mobility Management program that will evolve toward full MMC functionality over time.

This report introduces a set of mobility management strategies that Plumas County partners can implement over the next few years to phase in mobility management elements and move toward a formal MMC. In the short term, the partners should formally establish a Mobility Council (MC) to oversee any mobility management programs. This body should be an evolution of the County's Social Service Transportation Advisory Council (SSTAC) building on the structure and relationships of that entity. At the same time, the partners should implement a volunteer driver program to provide additional services using existing resources. These two efforts will help build a sound infrastructure to facilitate the mobility coordination efforts in the county. They will rely on the use of limited duration, part-time temporary staff to support program activities – possibly relying on existing partner staffing.

In the long term, the MC should phase in additional mobility management strategies when appropriate. The report highlights a resource sharing pilot project and establishment of a formal MMC as potential steps. However, these additional steps require additional financial resources to support capital and labor resource needs. Until such resources are available, full implementation of a MMC may not be possible. The following table highlights aspects of both the short- and long-term strategies.

Figure 1-1 Summary of Mobility Management Strategies

Strategy	Timeframe	Functions/Activities	Resource Requirements
Establish Mobility Council	Immediate	<ul style="list-style-type: none"> Oversee mobility management programs and projects 	<ul style="list-style-type: none"> Support from limited duration, temporary staff
Formalize volunteer driver program	Immediate	<ul style="list-style-type: none"> Match volunteer drivers using personal or partner vehicles with trip requests 	<ul style="list-style-type: none"> Support from limited duration, temporary staff Simple ridematching system
Ride-sharing pilot project	Long-term	<ul style="list-style-type: none"> Formalize resource sharing agreements among partners Schedule trip requests across multiple programs 	<ul style="list-style-type: none"> Support from limited duration, temporary staff Enhanced trip scheduling software
Incrementally build a Mobility Management Center	Long-Term	<ul style="list-style-type: none"> Build on ridesharing pilot to set up county-wide call center for trip scheduling and information and referral Plan for future mobility management activities 	<ul style="list-style-type: none"> Dedicated full-time Mobility Manager and part-time support staff

Chapter 2. Introduction

Project Overview

During the 2008 Plumas County Coordinated Public Transit – Human Services Transportation Plan process, the project team and various regional stakeholders identified the potential development of a countywide Mobility Management Center (MMC) and central information clearinghouse as a strategy to better serve the county’s senior, disabled, and low-income populations. The overarching goal of such a function would be to streamline service—making the range of *community transportation services* more available and legible to patrons and to reduce operating inefficiencies. For the purpose of this project, we are defining “community transportation services” as public, private non-profit, and private for-profit transportation services that focus on the three target population groups above.

Part and parcel of making public transportation services more efficient, better coordination of services through a mobility management function would leverage cost sharing opportunities. Of particular importance to Plumas County’s social service providers and Plumas Transit, this would effectively reduce operating cost per passenger. Social service, workforce development, and public transportation providers in Plumas County are seeking ways to control costs and efficiently provide a greater level of transportation-related services to clients and customers in the county.

Nelson\Nygaard Consulting Associates was contracted by the Plumas County Transportation Commission, the project’s sponsor, to study the feasibility of developing a Mobility Management Center (MMC) that would specifically manage a centralized information clearinghouse and call center. In order to do this, the project team was tasked to:

1. Develop an organizational and management framework
2. Identify mobility management partners and administrative and capital capacity
3. Identify initial operating and capital start up costs and opportunities for cost sharing
4. Pinpoint phased implementation steps that incrementally increase the robustness and capacity of the Mobility Management Center as resources and funding become available

This project, along with the 2008 Coordinated Plan, originally stems in response to planning requirements under the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users, commonly referred to as SAFETEA-LU. Under this federal transportation act, such plans must be in place before services and transportation providers in the region may access certain funding programs offered by the Federal Transit Administration (FTA) that fund transportation services focused on older adults, persons with disabilities, and persons with low income. These requirements impact Plumas County’s ability to access funding sources such as the Job Access and Reverse Commute Program (JARC, Section 5316), New Freedom (Section 5317) and the Formula Program for Elderly Individuals and Individuals with Disabilities (Section 5310).

This report focuses on summarizing the key elements of Mobility Management as they relate to community transportation services in Plumas County, identifying the service needs and opportunities for a future MMC, and identifying prioritized strategies and implementation actions to initiate MMC development. This is followed by a general implementation timeline and budgeting plan that ensures MMC operation is financially sustainable. The report is organized into the following five chapters:

- **Chapter 2: Introduction** – This section provides a contextual background on the project and sets the stage for the feasibility study. Key tasks of the study are presented, including an overview of the stakeholder and transportation provider outreach conducted throughout the study.
- **Chapter 3: Mobility Management Concepts** – This chapter identifies the key elements from the mobility management continuum of services. This conceptual background section frames potential organizational and service delivery models for the proposed Mobility Management Center.
- **Chapter 4: Needs and Opportunities** – This chapter elaborates upon the needs identified in the *2008 Plumas County Coordinated Public Transit – Human Services Transportation Plan* through discussion occurring during the April 26, 2011 Transportation Provider Workshop. This section also summarizes the results of the Agency Assessment Survey conducted in April 2011, which will guide many of the mobility management strategies developed in Chapter 4.
- **Chapter 5: Plumas County Mobility Management Strategies** – This chapter develops recommended strategies that were prioritized by the County's transportation providers. The strategy overviews include considerations specific to Plumas County including benefits, challenges, resource needs, financial implications, and policy implications.
- **Chapter 6: Program Implementation** – This chapter summarizes the function of mobility management within the context of Plumas County and develops a mobility management implementation program including a proposed budget with cost estimates and an implementation timeline. In addition, the final question of feasibility is answered, while long-term goals and short-term action steps are highlighted.

Supplemental information that supports Mobility Management Center implementation is compiled in a series of appendices. The Appendices include the following:

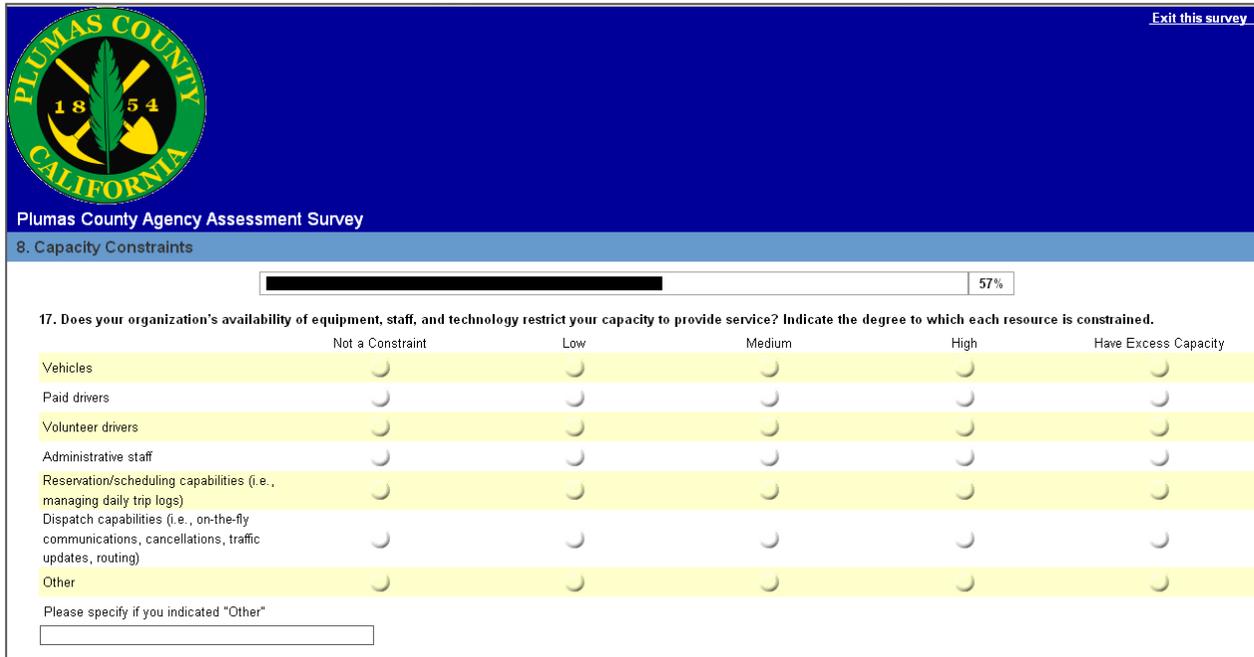
- **Appendix A:** Automated Scheduling Software
- **Appendix B:** Agency Assessment Survey Instrument and Summary
- **Appendix C:** Transportation Provider Workshop Results
- **Appendix D:** Additional Resources
- **Appendix E:** Sample Mobility Manager Job Descriptions
- **Appendix F:** Sample Agreements and Bylaws
- **Appendix G:** Cost Allocation Overview

Study Process

The Plumas County Mobility Management Center Feasibility Study approaches potential mobility coordination through a balance of technical assessments and human- or organizational-level evaluation. This dual focused approach allows the flexibility to identify the organizations and individuals most suited to take on the roles, responsibilities, and support activities of a Mobility Management Center, while offering technical and logistical planning for implementation and sustaining prolonged operations.

Provider outreach

The study process initially began with an intensive evaluation of Plumas County’s transportation provider organizational “capital”. To achieve this, the project team developed an agency assessment survey asking targeted questions aimed towards each provider’s operating characteristics, and administrative and capital capacity. The survey also helped identify potential synergies, baselines for technology deployment and informal networking, interest in resource and cost sharing, and highlighted preliminary partners and leaders. Chapter 4 highlights the survey results and Appendix B details the survey’s questions and key responses.



Twelve of Plumas County’s transportation providers responded to the agency assessment survey, which helped to identify the area’s opportunities and constraints for service coordination and organizational synergy.

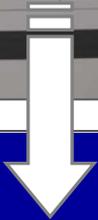
Perhaps the most critical component of the study was the Transportation Provider Workshop. The workshop was held on April 26, 2011 at the Quincy Public Library Conference Room and was attended by thirteen participants. This influential event initiated constructive dialogue between the County’s transportation providers. The workshop’s participants confronted some of the key issues that need addressing prior to instituting formal MMC operating agreements, and highlighted key opportunities that could be exploited. The workshop’s agenda included a brief presentation of the study’s objectives, current mobility conditions in Plumas County, and mobility management concepts and operating models. The workshop then broke out into a collaborative discussion of opportunities and constraints related to the infrastructural needs and phasing for the mobility management implementation process. Opportunities and constraints were written on boards and summarized into strategies. Originating from these presentation boards, the project team developed a second Strategy Prioritization Survey that asked workshop participants to rank mobility management strategies. These prioritized strategies in turn formed the basis for our technical evaluation of mobility management strategies.

Strategy Development

The coordination of community transportation services is a complex and dynamic process, especially when determining if and how to centralize mobility coordination efforts through a mobility management function. Even after the major participants agree on an approach, there are many technically-nuanced choices which must be made about service configuration, call center operations, cost allocation/sharing among sponsoring organizations (for costs associated with both the call center and service delivery), invoice rate structures, technological functionality, marketing programs, and many other aspects of the technical solution. Chapter 5 develops a set of Mobility Management strategies for Plumas County derived from the surveys and provider workshop. The presentation of proposed strategies includes the necessary action steps to overcome implementation obstacles and facilitate service coordination and resource sharing.

Mobility Management Opportunities and Constraints

MMC Element	Opportunities/Strengths	Constraints/Weaknesses
Infrastructure	USED TO HAVE	Need Leader
Trust and Leadership	SSTAC Randomly Exists	Can't Con Suse w/ Forest CC
Formal Agreements	- Formalize (Bylaws etc) the TAC as C.C	Still Function as SSTAC
Coordination Mechanisms	Theme-Based Regional Org Currently exist (and can be a 501.c3 org)	Bi-State Constraints @ multiple levels
Funding requirements that support or hinder collaboration	FHWA Recognition of Role in C- Programs	Tribes not fully engaged
Existence or likelihood of a champion partner	BBB	



[Exit this survey](#)



Plumas County Strategy Prioritization

3. Priorities

60%

3. Indicate your top five priorities for implementing the following mobility management strategies to address the opportunities and/or constraints captured in the workshop.

	First Priority	Second Priority	Third Priority	Fourth Priority	Fifth Priority
Infrastructure					
Formalize a regional mobility council.	<input type="radio"/>				
Phase 1					
Develop a transportation services resource guide.	<input type="radio"/>				
Establish a system where all providers have access to fuel under a bulk rate.	<input type="radio"/>				
Develop a centralized driver training program.	<input type="radio"/>				
Establish common vehicle inspection policies and procedures.	<input type="radio"/>				
Establish a centralized vehicle maintenance program/facility.	<input type="radio"/>				
Establish ongoing planning activities for the mobility council.	<input type="radio"/>				
Phase 2					
Establish formal Information and Referral agreements to facilitate referring of rides from one provider to another.	<input type="radio"/>				

Chapter 3. Mobility Management Concepts

Mobility Management and Mobility Coordination

Mobility management carries a number of connotations today, but it is best to think of the term as a system of people and tools put in place to achieve local or regional mobility coordination goals. There are many ways to coordinate information and services, ranging from the very simple to the very complex – all are beneficial and all require trust among participants. Mobility coordination requires an inclusive process to generate trust and maximize participation of those looking to coordinate. Mobility management can be a tool to facilitate this process. Mobility coordination also requires a champion – a point person, an organization, or a group that wants to make coordination succeed. The mobility manager should be that champion.

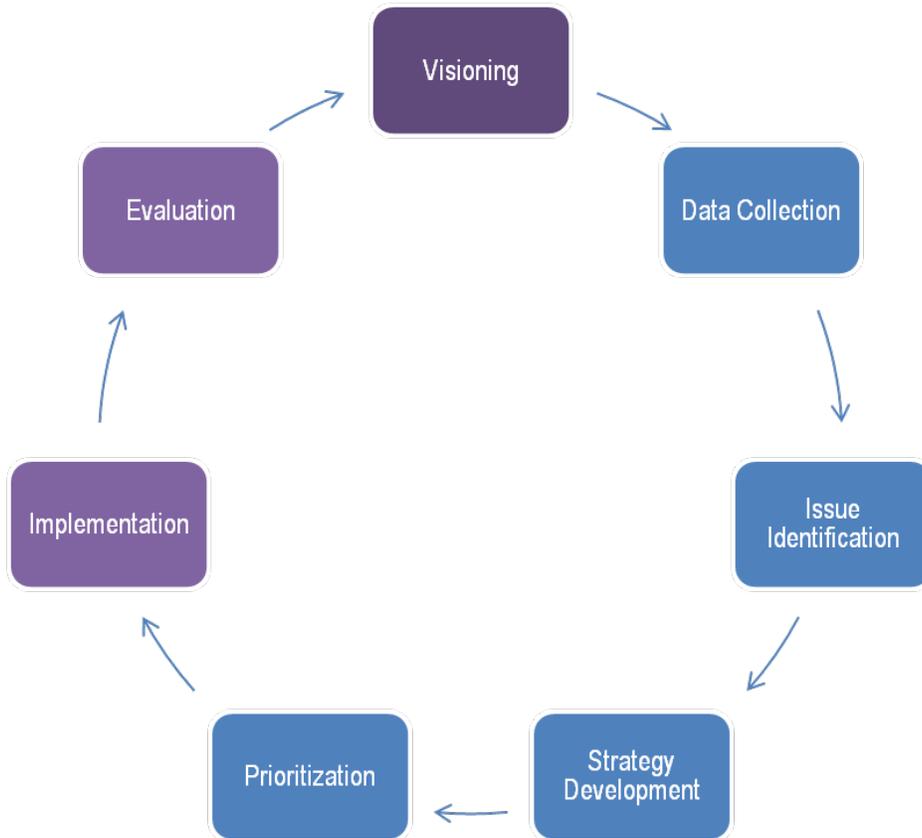
Mobility coordination can be thought of as the ways in which organizations can work together to share information and resources in providing transportation to those populations who rely on transportation services. Then mobility management becomes the means for developing and executing strategies to address unmet needs through coordination.

Figure 3-1 presents a model for this process. It starts with the coordinating partners developing a vision, then using data and information to identify issues that need addressing to achieve that vision. Then strategies are developed, prioritized and implemented in an effort to address the needs. Finally, the results are evaluated to see how well the chosen strategies are meeting the goals. The cycle continues making sure the vision is still current and that the chosen strategies are appropriate.

In summary the goal is to improve access; coordination is how to accomplish this goal; and mobility management is the system that makes it work.

Both service providers and end users benefit from the application of mobility management techniques. Service providers look to avoid waste by not duplicating efforts, sharing underutilized resources and operating under an economy of scale. Resources that have been freed up can then be devoted to the delivery of additional services, which directly benefits the customers of transportation services. The coordination and centralization of information and processes also benefits customers by streamlining their interactions with transportation providers and making more information available to them.

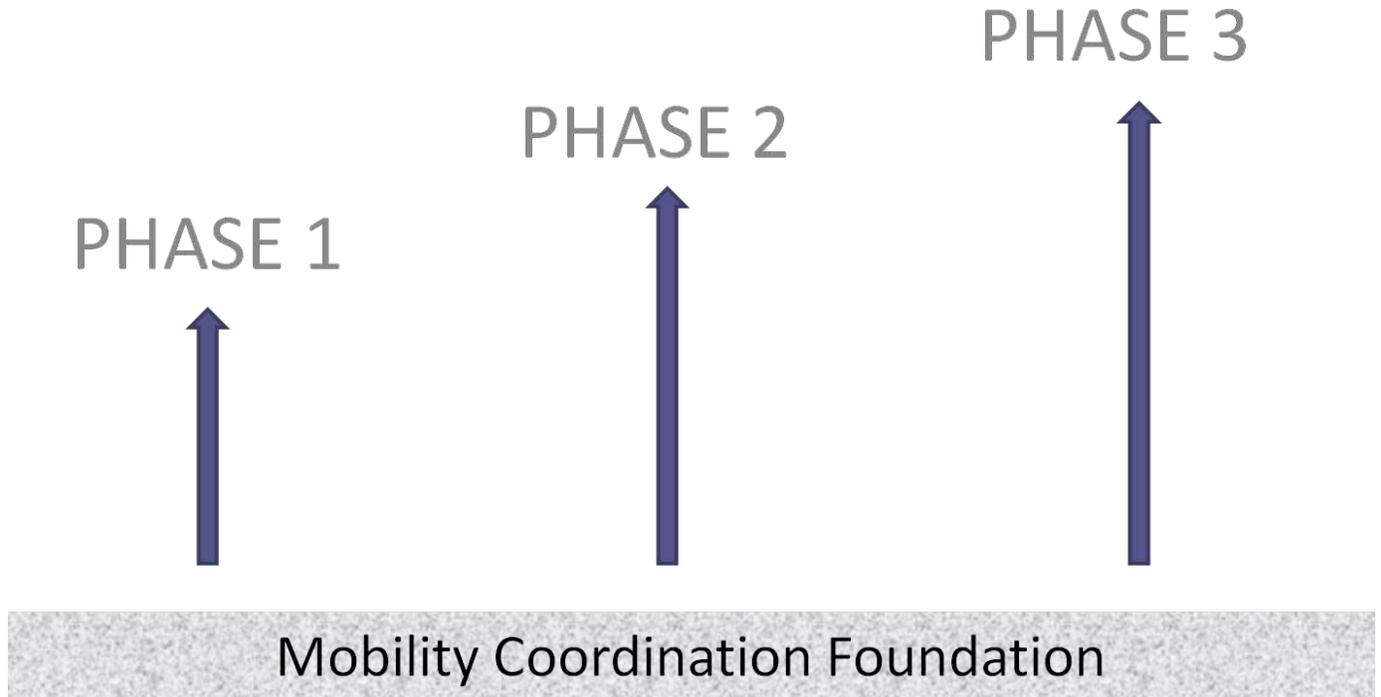
Figure 3-1 Mobility Coordination Strategy Development and Execution



Mobility Management Framework

As highlighted in Figure 3-2, mobility management can be viewed as the execution of simple (Phase 1) to complex (Phase 3) coordination strategies while relying on a sound organizational foundation. Core to this foundation is an infrastructure of trust between parties and the leadership of a champion. Participants in the process need to have trust in a set of common goals and trust in their partners to work toward those goals. The champion is the one who facilitates everyone's work and keeps an eye on the end mission, whether they are a member of a partner organization or hired staff working for the coordinating body.

Figure 3-2 Mobility Management Framework



The foundation relies on successful interaction of partner organizations. This in turn requires a structure to formalize working relationships and how they are expected to work in unison. This typically requires some form of written agreement such as a memorandum of understanding, a pledge, or bylaws dictating who should be around the table, what is expected of them, what resources they are contributing etc. These bodies are typically formed in the name of “coordinating councils.”

These councils carry out a number of tasks including:

- Developing mobility coordination strategies
- Securing resources needed to implement strategies
- Monitoring progress toward goals
- Engaging in regional and/or statewide coordination efforts
- Networking with peers

While the council is ultimately responsible for these actions, some may be carried out by assigned individuals, whether members of the council or hire mobility managers.

The Mobility Coordination Continuum

As mentioned, mobility coordination strategies can be thought of as falling into one of three phases based on how easily they can be implemented and what resources (especially shared ones) are required. The following list highlights typical strategies in order of complexity with the initial ones requiring minimal shared resources and easily implemented by councils developing mobility management programs, and the later ones requiring a significant level of shared resources and typically associated with mature programs.

- Providing information and referrals
- Sharing policies and practices
- Sharing staff resources
- Sharing vehicles, software
- Allowing co-mingling of trips
- Informally swapping trips
- Purchasing service from another operator
- Consolidating programs or operations into one coordinated system

Figure 3-3 presents a summary of the mobility management foundation and phasing of strategies.

Figure 3-3 Summary of Mobility Management Concepts

	Key Organizational Elements	Key Organizational Activities
Infrastructure: Laying the Foundation	<ul style="list-style-type: none"> • Champion leading the way • Trust & Leadership • Formal agreements to reinforce commitment, accountability & trust 	<ul style="list-style-type: none"> • Strategy development and implementation • Securing resources needed to implement strategies • Monitoring progress toward goals • Participation in regional & state-level coordination efforts
	Typical Strategies for the Customer	Typical Strategies for the Service Provider

<p>Phase 1</p>	<ul style="list-style-type: none"> • Creation and dissemination of centralized directory • One-stop access for information 	<ul style="list-style-type: none"> • Facilitation of sharing policies and practices (e.g., grant applications, vehicle specifications, training curriculum)
<p>Phase 2</p>	<ul style="list-style-type: none"> • Referrals and rudimentary trip planning • Fare and/or mileage reimbursement 	<ul style="list-style-type: none"> • Local sharing of support staff and resources • Joint purchasing of fuel, maintenance, insurance, vehicles, software/hardware, etc. • Centralization of resources (e.g., back-up drivers, volunteer drivers, escorts, bus buddies) • Co-sponsorship of local operations
<p>Phase 3</p>	<ul style="list-style-type: none"> • Enhanced trip planning • One-stop for requesting trips • Trip boards for unsponsored trips 	<ul style="list-style-type: none"> • Trip swapping • Seat filling/coordinates schedules • Purchasing service from another provider • Consolidation of call center functions • Consolidation of operations

Chapter 4. Needs and Opportunities

Needs Assessment

It is important to note that a Mobility Management Center will not provide a magic bullet to the county's mobility needs, *nor will it necessarily create more service*. However, it is valuable to identify the unmet mobility needs of the county to ensure the Mobility Management Center's scope and services adequately reflect the needs of older adults, persons with disabilities, and persons with low income. Many of the needs for service coordination, deployment, and marketing are framed by the needs identified in the *2008 Plumas County Coordinated Public Transit – Human Services Transportation Plan*. Because little has changed in terms of service provision and coordination efforts, the 2008 Coordinated Plan provides the baseline for the county's unmet transportation needs. The key findings from that study include:

- Better handling of overlapping trips and greater visibility of services. As part of this, mobility management was specifically identified as a potential opportunity for improving service efficiency (seat filling and elimination of service duplication) and marketing of services (information clearinghouse).
- Greater frequency of service.
- Lack of long-distance inter-city service. Direct service between Chester and Chico was specifically highlighted as an unmet service.
- Expanded weekend service. This is a critical mobility need important for FRC students, weekend shoppers, and Chester residents seeking weekend access to Susanville shopping.
- Increased coverage to Chilcoot-Vinton and Bucks Lake.
- Increased service between Lake Almanor Basin and Westwood. The crux of this unmet need is improving access to basic medical services.
- Service to Chester Airport.

As stated above, better coordination was identified as an unmet need, yet the county exhibits minimal barriers to mobility coordination. This presents a key opportunity when developing the Mobility Management Center. The 2008 report identifies only three major obstacles to coordination, including:

- A growing demand for infrequent and long-distance trips to destinations like Chico, Susanville, and Reno, NV;
- Limited informal and direct communication between providers and almost no formal communication between providers;
- Difficulties in sharing resources, whether vehicles with extra capacity, or professional service in support of transportation operations.

Similarly, information gleaned from the organizational assessment survey and the provider workshop shows that many transportation providers believe that there is little capacity for resource sharing.

Service and Organizational Changes since 2008 Coordinated Plan

Although little significant change has occurred in terms of service provision, several developments have occurred that will affect the development of the Mobility Management Center and the services it provides. Since the 2008 Plan, the following changes have occurred:

- Plumas Transit's contract provider changed from Alliance for Workforce Development, Inc. to Plumas Rural Services
- In September 2010, Lassen Rural Transit expanded out-of-county service from Lassen County to Chester with a transfer at Holiday Market
- A new Veterans Affairs health care facility—the VA Diamond View Outpatient Clinic—opened in Susanville in August 2010
- The Plumas County Transportation Commission and Plumas Transit indicate that FTA Section 5310 grant applications are not competitive because ridership numbers are too low and the Senior Center stopped submitting grant requests
- Plumas Transit recently expended critical capital funding for vehicles due to the California Air Resources Board's requirement for the agency to purchase new transit vehicles to comply with state air quality standards—specifically Title 13 of the California Code of Regulations including Sections 2020, 2023, 2023.2, and 2023.4
- Plumas Rural Service also cited capital funding needs for fleet improvements
- The Plumas Public Health Agency possesses one or more vehicles, but legal and risk management issues have yet to be resolved.
- AMVETS donated an eight-passenger van to Plumas County Veterans Service Department in 2001, but reportedly imposes limits on its use potentially reducing or eliminating the potential for vehicle sharing or seat filling

Organizational Assessment

The project team conducted an agency assessment survey and held a Transportation Provider Workshop in order to recognize potential partner organizations, identify availability of administrative and technological capacity and overlapping services, and pinpoint specific opportunities and barriers to better coordinate transportation services.¹ The agency assessment survey was completed by twelve organizations that are either directly or indirectly responsible for providing trips to area clients and customers. This includes a transportation liaison from the We Care A Lot Foundation that schedules trips to Plumas County from Chico from the Far Northern Regional Council. A comprehensive compilation of survey results is provided in Appendix B. The April 26, 2011 Transportation Provider workshop was attended by thirteen representatives from

¹ Because the largely qualitative nature of a feasibility study such as this, Nelson\Nygaard believes the organizational assessment is the most effective way to evaluate the current organizational arrangements and opportunities for coordination. This is not a "scientific" method, although we are interpreting answers and comments made during the survey and workshop using our license to make professional judgment. It should also be noted that some survey respondents may have misinterpreted some of the questions. Nelson\Nygaard is confident that our interpretation of the survey's answers reflects the intended position of the questions asked.

eleven organizations. The survey and provider workshop helped to identify several key findings that will influence the county's ability to better coordinate services and share resources. The general status of the county transportation provider's organizational infrastructure is summarized below, informed by the agency assessment survey, the Transportation Provider Workshop, and observations made during the workshop and conversations with stakeholders throughout the study's process:

- **Widespread interest in mobility management.** In the agency assessment survey and the Transportation Provider Workshop, several organizations expressed interest in creating a Mobility Management Center and/or playing an integral role in its formation and operation. These organizations include:
 - Plumas Rural Services
 - Plumas Transit
 - Plumas County Veterans Service Office
 - Plumas County Social Services
 - Plumas County Public Health Agency Senior Transportation
 - Plumas Unified School District
- **Strong inter-organizational relationships, but lacking formal structure.** Public sector agencies and non-profit human service organizations indicated in the Transportation Provider Workshop and the agency assessment survey that the transportation providers hold frequent informal communications regarding transportation service needs and opportunities. However, the organizations do not consistently address mobility coordination issues on a formal basis.
- **Limited technology deployment.** A quarter of the agencies responding to the agency assessment survey do not require customers to schedule any advance reservations. The majority of customer reservations are made over the phone (a method represented by half of the responding agencies), while only one agency has employed an online reservation system (Environmental Alternatives). Three organizations including Plumas Unified School District, Environmental Alternatives, and We Care A Lot Foundation allow customers to make reservations through a third party scheduler.

Another key finding from the survey is that none of the county's transportation providers utilize sophisticated trip scheduling software. The majority of trip scheduling procedures include client calls and writing down trip assignments in a trip log, notebook, or office calendar. Plumas Rural Services does use a Google Calendar for trip scheduling on a vehicle-by-vehicle basis. That is, each vehicle making trips has its own Google Calendar for scheduling a trip. On the day of operation, the operator is provided with a printed Google Calendar "trips schedule".

In terms of managing trips in progress, only one provider (Plumas Unified School District) employs a centralized radio dispatch system with radios in each of the vehicles in operation. This may be a barrier to consolidating communications because in all other cases cell phones are the primary communication media. These agencies would need to find common ground on a single technology to streamline communications.

Not surprisingly, the County agencies that took part in the survey utilize a county cost accounting system that accurately tracks monthly transportation-related expenditures.

Plumas Unified School District uses an accounting system developed by the California Department of Education. All other organizations use fairly informal cost tracking systems ranging from Excel spreadsheets to transportation logs and gas card receipts used as a purchase order.

- **Standard, yet minimal training for some transit operators.** Of the eight respondents indicating that their organization is directly responsible for operating public transportation vehicles, only three enroll their transit operators in an accredited driver training or certification program. Plumas Unified School District requires its drivers to complete the California Department of Education's School Bus Driver Training program. Plumas County Social Services transportation operators must complete the county's defensive driver training; however, it is unclear whether this driving program's curriculum is geared toward passenger transport. Plumas District Hospital provides emergency medical trips; therefore they enroll operators in a specific EMT driver training program administered by NorCal Ambulance. Plumas Transit requires its transit operators to complete an in-house driver training program.
- **Low administrative and capital capacity.** In general, the county's transportation providers believe that their current level of funding and infrastructure cannot support any significant increase in workload that could be required of mobility management. That being said, two organizations, Plumas Rural Services (PRS) and Plumas Unified School District (PUSD), scored themselves having high or medium capacity in the areas of driver training, maintenance, grant writing, and fleet management. PRS was the only organization to express a high level of capacity to house a countywide mobility manager. Consistent with their eagerness to house the MMC, PRS' medium level capacity for marketing transportation services and programs could be tapped for Information and Referral (I&R) programming. Although PRS and PUSD expressed an excess amount of capacity in the areas of fleet management, maintenance, and marketing, these areas were given "low" or "no capacity" across the board by the majority of the other transportation providers.
- **Low funding levels.** Given the current economic climate, it is not surprising that all responding transportation providers expressed concern over the fate of future funding streams. This is a significant barrier that will greatly influence any mobility management function's scope and effectiveness. Although the concept of pooling financial resources was only supported by two of the survey respondents, more collaborative processes for obtaining shared funding sources was identified as an alternative to traditional funding streams (see below).
- **Leaders identified for collaborative grantwriting.** In response to funding issues expressed by each organization, most organizations indicated their interest and level of capacity to support grant writing efforts. All of the county agencies and two of the non-profit respondents (Plumas Rural Services and Environmental Alternatives FFA) expressed interest in using their skills and experience to go after larger pots of competitive grant monies. However only three organizations indicated that they have the capacity to take on such an effort. Potential grant writing training sessions could be developed by these leaders to match interest with capacity.

- **No formal mobility coordination structure.** No dedicated information stream or mobility coordination agreement has been developed between any of the county’s transportation providers. Although the county’s major transportation players that comprise the Social Services Transportation Advisory Council (SSTAC) convene for various projects and activities such as the 2008 Coordinated Plan, this arrangement meets at random and acts more like an ad hoc committee on coordinating issues—as cited during the transportation provider workshop. In addition, some key stakeholders/providers, like the Greenville Rancheria, do not always participate in even the ad-hoc meetings.

Some additional comments made in the survey and the workshop that best summarize the key issues, challenges, and opportunities with regards to MMC formation include:

- Funding and technology enhancements were identified as the two most needed improvements to provide higher quality mobility options in and out of the county
- Transportation providers are clear that consolidating service under a single provider is not an attractive option for such a diverse set of customer needs (services for the general public, elderly, individuals with a disability, and social service clients)
- When asked what is needed to facilitate coordination of transportation services, responses directly related to the development of a mobility management function included the following:²
 - More communication and information about available vehicles and options needs to occur and insurance issues need to be addressed
 - Centralized scheduling and/or mobility manager to assist the numerous agencies providing transportation services. This could potentially eliminate duplication of services, thus saving money
 - Improve the relationship between public transit and human service transit and better market services to a diverse range of clientele

Figure 4-1 summarizes the results of the survey and workshop, showing which respondents have the interest, skills and capabilities, and organizational capital to become a major role player in the Mobility Management Center’s development. This differentiates interest in participation from the capacity to fulfill specific roles.

² Note: These open-ended questions have been truncated and edited for brevity.

Figure 4-1 Utility Levels of Plumas County Organizations for Performing Mobility Management Functions

<u>Utility Level</u>		Plumas Rural Services	Plumas Unified School District	Plumas County Public Health Agency/Senior Transportation	Alliance for Workforce Development, Inc.	Environmental Alternatives FFA	Plumas Crisis Intervention and Resource Center	Plumas County Veterans Service Office	Plumas County Social Services	We Care A Lot Foundation	Plumas Transit	Plumas District Hospital	Greenville Rancheria
High	●												
Medium	◐												
Low	○												
Interest in MMC Partnership		●*	●	●	○	◐	◐	●	●	○	●	○	○
Communication/Networking		●	◐	●	○	◐	●	●	●	●	●	●	○
Employing Technology		●	◐	●	○	◐	○	●	●	○	○	○	○
Capacity to Train Staff		●	●	○	○	○	○	○	○	○	○	○	○
Administrative Capacity		●	●	●	○	◐	○	●	●	○	◐	○	○
Vehicle Capacity		○	◐	●	○	◐	○	●	●	○	◐	○	○
Grant Writing		●	●	○	○	○	○	○	○	○	○	◐	○

Note: PRS was the only organization to express their capacity to house the MMC.

Given the results of the agency assessment survey and observations stemming from the transportation provider workshop, where does Plumas County stand in terms of need for organizational development? Who are the initial frontrunners that have the enthusiasm, leadership skills, technology, and administrative and capital capacity to take the lead on initial strategy development and potentially the eventual operation of a Mobility Management Center? As stated before, Plumas Rural Services and the Plumas County Social and Human Service agencies, which include Plumas County Veterans Service Office, Plumas County Social Services, Plumas County Public Health Agency Senior Transportation, appear to be the initial “champions”.

Plumas Rural Services (PRS) offers the flexibility of a non-profit operating model and the capacity for leading mobility management efforts. During the transportation provider workshop and in their response to the agency assessment survey, PRS conveyed their high level of engagement and willingness to collaborate and share resources. PRS also confirmed their capacity to potentially house the Mobility Management Center. The implementation strategies highlighted in Chapter 5 require a sponsoring agency and PRS is a leading candidate for assuming that role.

Plumas Unified School District is considered a suitable *major support* partner especially in the realm of sharing resources for procuring fuel, vehicles, vehicle tracking and scheduling technology, as well as for centralized training programs for transportation operators. Although Plumas County agencies expressed interest in being engaged in the MMC implementation process and its operation, they indicated their lack of support capacity on a variety of levels. Therefore, Plumas County Veterans Service Office, Plumas County Social Services, and Plumas

County Public Health Agency Senior Transportation are considered *support* partners. These agencies will likely aid in the development and upkeep of the information clearinghouse, offer available seats in vehicles to be filled, collaborate on grant writing efforts, and foster valuable dialogue during formalized coordination discussions.

In addition, we have identified a peripheral, yet important partner that could provide a vital support role rather than financial or capacity enhancements. Feather River College is a major transit generator and significant customer base for Plumas Transit.

Chapter 5. Plumas County Mobility Management Strategies

General Overview

Plumas County public transportation providers are in a position to address the needs identified in Chapter 4 by implementing a variety of mobility coordination tactics. At the same time, a number of proven mobility management strategies are available to take advantage of the organizational opportunities and strengths detailed in the previous chapter. The local partners are not immediately positioned to establish a full-serve Mobility Management Center as they currently lack the funding and a structural framework to develop and operate such an enterprise. But they possess the skills and desire to start implementing a robust Mobility Management program, evolving toward MMC functionally over time.

This chapter introduces a set of mobility management strategies that Plumas County partners can implement over the next few years to phase in mobility management features and move toward a formal MMC. The strategies are presented in an order that is consistent with the mobility management elements and phasing described in Chapter 3. Strategy 1 helps build a sound infrastructure to facilitate the mobility coordination efforts in the county. The remaining strategies phase in additional mobility management elements – demonstrating the county’s working relationships, tools and procedures, and building incremental successes.

Appendix D provides a list of additional resources that provide additional information regarding the elements entailed within each of these strategies. The following sections discuss each strategy, highlighting:

- Goals for taking on the strategy
- Benefits and anticipated results
- Challenges and obstacles that may be encountered
- Examples of similar applications
- Local application of the strategy
- Resource needs
- Financial implications
- Action steps

Strategy 1: Establish a Mobility Council

Overview

Formation of a Mobility Council representing transportation providers, purchasers, users and decision makers can help enhance local mobility coordination efforts by providing a framework within which coordination can more easily take place. The building blocks of a successful Mobility Council are found in fundamental team building concepts. In order for teams to succeed they must have a common goal, leadership, well defined roles, common expectations and rules of accountability, and trust. These building blocks form the foundation of successful coordination.

Recognizing this, we have developed a generic MOU and bylaws that integrate these building blocks in the context of mobility management to assist in forming a functional Mobility Council. This MOU and adjoining bylaws can be found in Appendix F.

We recommend Plumas County use the MOU and bylaws to form a Mobility Council consisting of interested and willing organizations serving the Plumas County area as the first step toward implementing a Mobility Management Center.

Goals

The goal of a Mobility Council is to establish a framework within which coordination can more easily be accomplished.

Benefits

Establishment of a Mobility Council provides many benefits. The principle benefits include:

- A well defined mission and purpose to which members can aspire
- An environment that fosters formal and informal leadership
- An environment in which members can build trust over time
- A formal mechanism to support the on-going process of mobility coordination and greater ability to maintain momentum
- Reinforced commitment of individual members as a result of being part of a group
- An understanding of expectations and roles so that individual members know what is expected and are empowered to act
- Improved information sharing
- Improved ability to compete for grants through coordinated applications

Challenges and Obstacles

There are very few obstacles to implementing a Mobility Council in Plumas County. The principle issues raised during the workshop are:

- **Potential Confusion with the Plumas County Coordinating Council** – In some parts of the country, Mobility Councils are referred to as local coordinating councils. One constraint discussed during the project workshop is the potential for the Mobility Council to become confused with a similarly named “local coordinating council”, i.e., the Plumas County Coordinating Council. To distinguish the two organizations, we have intentionally labeled the mobility-related council “Mobility Council.” This term, or a variant of it, should be used to clarify the role and function of the Plumas County Mobility Council.
- **Compliance with Brown Act Public Meeting Rules** – The Mobility Council’s connection with local legislative bodies needs to be defined in such a way that the activities of the council will not trigger the Brown Act public meeting rules.

Examples

The examples in this section illustrate the organizational structure and guiding principles for two coordinating councils. While the two examples cover larger geographic areas, their establishment of overarching goals, organizational relationships, and program areas are typical of mobility councils around the country – large and small.

Wasatch Front Regional Coordinating Council

The Wasatch Regional Coordination Council for Community Transportation (RCC) was created to establish the mobility management program for the five-county region including Davis, Morgan, Salt Lake, Tooele, and Weber counties in Northern Utah. The Mission of the RCC is to foster, organize and guide local and regional coordination efforts that directly or indirectly improve access and mobility for seniors, persons with disabilities and/or persons with low income. RCC member agencies include public and private agencies serving the transportation disadvantaged.

The Wasatch Front Regional Council Metropolitan Planning Organization serves as the administrative home of the RCC and provides a full time mobility manager to assist the RCC. The RCC is governed by a four-person executive council. Although the RCC serves in an advisory and advocacy capacity, it has no formal connection to the elected body that comprises the Wasatch Front Regional Council.

The RCC currently consists of five standing subcommittees focusing on marketing, membership, planning, policy and projects. Since its formation, the RCC implemented a vehicle sharing program using retired vehicles donated by the Utah Transit Authority (UTA) in 2010. In 2011, the RCC conducted a collaborative evaluation of proposed UTA service cuts using geographic information systems and 2010 census data to improve proposed service changes. The RCC also maintains the website WasatchRides.com which provides information about regional coordination efforts.

The RCC was implemented in 2010 to lay the foundation for a broader coordination effort envisioned in the region's recently completed Mobility Management Plan. The plan identified the need for a one-stop transportation brokerage and call center. A similar effort in the mid-eighties failed due to lack of trust among key participants. Resolved to avoid a similar outcome this time, key partners formed the RCC, in part, to build the trust and leadership that was missing the first time a brokerage was attempted. As an initial step toward building the brokerage, the RCC is currently working with the Utah Department of Transportation and the Utah Division of Services for People with Disabilities to design a pilot project for a one-stop call center.

I-way.org

I-way.org is Idaho's statewide network of transportation options and mobility managers. The I-way network consists of multiple Local Mobility Management Networks (LMMNs) and Districts. LMMNs are organized in single counties or around two to three county areas. Districts comprise between two to four LMMNs. The entire state of Idaho has a total of seventeen LMMNs in six districts.

The I-way network is a grassroots initiative sponsored by the Community Transportation Association of Idaho (CTAI). Districts are given the resources of a mobility manager and support in the form of information and networking, but are left to define needs and strategies to address unmet needs at the local level.

Through I-way, CTAI works in partnership with local mobility stakeholders to³:

- Build awareness of the options that currently exist in the state and how they can be more efficiently used.
- Educate citizens about why it is smart to “mix up” how they get from point A to point B.
- Create an understanding that transportation options are designed to meet citizens’ and visitors’ needs.
- Shift attitudes from closed to open when it comes to using modes of transportation that are new or different from what they are used to.

Local Application

We recommend the Plumas County Mobility Council be formed from the existing, albeit inactive, Social Service Transportation Advisory Council (SSTAC). The existing SSTAC is a Consolidated Transportation Services Agency (CTSA) designated under the auspices of the Social Services Transportation Improvement Act by the Plumas County Board of Supervisors⁴. Establishing the Mobility Council within the SSTAC streamlines the implementation process and lends credibility to the council.

Membership

We envision the Mobility Council be composed of organizational members and a few individual members. The organizational members might include regional representatives of the state funding agencies serving Plumas County, representatives from other purchasers of service, representatives from local service providers, and representatives from other stakeholder organizations. Based on our understanding of the current organizations, we recommend the following organizations be considered for membership in the Mobility Council.

- Plumas County Veteran Services
- Plumas County Public Health Agency
- Plumas County Social Services
- Greenville Rancheria
- Feather River College
- Department of Emergency Services
- Plumas Rural Services
- Environmental Alternatives FFA
- School District
- Head Start
- Eastern Plumas Health Care
- Plumas District Hospital

³ Community Transportation Association of Idaho. (2010, August). *About I-way*. Retrieved May 20, 2011, from I-way.org: http://i-way.org/_literature_55857/I-way_Basics

⁴ See Chapter 1 of the Plumas County Coordinated Public Transit – Human Services Transportation Plan for more details.

To assist with the formation of the Mobility Council, we have developed a sample MOU and a sample set of bylaws. The first step to becoming a bona fide organizational member of the Mobility Council is to sign the Memorandum of Understanding. This process helps establish commitment by signifying that the organization will participate in this coordination effort. Once the MOUs are signed and representatives from each agency selected, the Mobility Council, would adopt a set of bylaws. The bylaws would address issues such as membership, officers, meetings, voting, committees, etc. Once the bylaws are approved by members of the council, we recommend the formation of sub-committees. Sub-committees could include an executive committee, a membership committee, a marketing and/or projects committee. Once the bylaws are finalized, they can be amended to accommodate changing needs in the county. A sample MOU and set of bylaws for a coordinating council are presented in Appendix F, respectively.

Primary Functions

In the process of establishing a Mobility Management Center, the Mobility Council will serve a variety of critical support functions. These functions include guiding and implementing local coordination strategies and participation in regional and statewide coordination efforts. In addition to these roles, the Mobility Council will also play a role in hiring, training and overseeing temporary staff and eventually, a mobility manager.

Guide and implement projects

The Council's primary purpose is to help develop, implement, and provide guidance to the coordination of community transportation services within the county. In this capacity, the Council will play a role in planning and implementing a variety of mobility coordination projects. The Mobility Council will take the lead in implementing the strategies outlined in this plan, but may also play a role in other identifying and developing additional strategies deemed important to the Mobility Council, including but not limited to:

- Implementation of travel training programs for new riders;
- Cooperation with mobility coordination projects at the state and/or regional level;
- Implementation of a countywide van pool program; and
- Development and implementation of pooled maintenance, procurement and insurance programs

Participation in regional mobility coordination efforts

There are benefits to establishing ties at the regional and inter-regional levels. The Mobility Council should formally participate in relevant multi-county efforts while simultaneously supporting informal involvement in regional coordination efforts on behalf of its members. Examples of regional organizations with which the Mobility Council could consider working include:

- **The North State Super Region** is a large regional planning organization serving 16 counties in Northern California. Among other functions, the Super Region collaboratively tracks grant opportunities and works to advocate for transportation investment in rural Northern California.
- **Other Mobility Councils** that form in neighboring counties to help promote mobility coordination and develop solutions to inter-regional community transportation needs.

Participation in statewide mobility coordination efforts

One function of the Plumas County Mobility Council will be to provide feedback to state agencies that fund/sponsor community transportation relative to policies and practices that successfully foster and that adversely affect the coordination of community transportation services and information. This can be accomplished through formal participation in statewide policy review efforts (like the one recently completed by CalTrans for its State Management Plan for Federal Transit Administration programs), or informally via correspondence prepared by the members of the Mobility Council.

Beyond reviewing and commenting on policies and practices, the Mobility Council can actively participate in statewide coordination initiatives. An excellent example of this is formal participation in the state's 211 initiative.

Hire and Train a Mobility Manager

The efforts of a Mobility Council can be greatly enhanced with the assistance of dedicated staff. We have outlined a phased approach to providing staff support for the activities of the Mobility Council. Starting with implementation of Strategy 2, we recommend hiring or shifting existing part-time temporary staff to assist with the startup and administrative functions of the volunteer driver program. Pending the Mobility Council's decision to identify and secure additional funding at some time in the future, we recommend increasing the involvement of staff to include startup and administration of the pilot ride-sharing program detailed in Strategy 3. Once Strategy 3 has been fully implemented, we recommend hiring a full-time mobility manager. Depending on their performance during strategies 2 and 3, this position could be filled by promoting one of the part-time temporary employees who assist with the preceding strategies.

Resource Needs

The following resources are needed to implement this strategy.

Administrative Sponsor

The Mobility Council will need an administrative sponsor. If the Mobility Council does not generate revenue, the role of the administrative sponsor will be limited to hosting meetings and potentially hosting the Mobility Council's website. If the Mobility Council generates revenue in the form of grants or other income, the administrative sponsor will act as the fiscal agent for the Mobility Council. This role will become especially important when the Mobility Council hires staff, as the administrative sponsor will serve as the employer.

Office space provided by the administrative sponsor should be counted toward in-kind match. Assuming an annual rental rate of \$14 per square foot for full-time use of a 100 square foot office, we estimate approximately \$1,400 in proportionate lease expense per year as eligible in-kind match.

Based on our understanding of the available resources in the Plumas County area, we recommend Plumas Rural Services serve as the administrative sponsor.

Labor

The Mobility Council may wish to hire staff to assist with implementation of the other strategies identified in this plan. We recommend a phased approach to hiring staff. Initially, the Mobility Council should hire temporary staff on a part-time basis. As outlined in the implementation

schedule included in Chapter 6, we envision a one-year period during which strategies 1 and 2, are implemented. This build-up period presents an opportunity to hire low and moderate income job seekers to assist the Mobility Council, thus fulfilling the CDBG intent to create jobs for low to moderate income workers as part of this project.

A benefit of hiring a part-time staff person during the first year is it allows for individuals in the community to become trained and vetted as potential mobility managers. The job skills required to be a mobility manager reflect a blend of social service, civil engineering, urban planning, and public administration duties. A fulltime Mobility Manager will also likely need good fundraising or grant writing skills to help sustain their position and the program after initial grant funding expires. Given there are often few individuals who possess these skills in the marketplace, the build-up period would enable the Mobility Council to train one or more potential candidates in preparation for the Mobility Management position. Recognizing the risk inherent in hiring inexperienced staff, the idea of breaking the employment periods into three three-month blocks allows the Mobility Council to “try out” different candidates. If the temporary staff hired during the first three months performs well, they can be considered for the subsequent three-month block.

Once the Mobility Council has implemented strategies 2 and 3, the temporary staff position should transition to a full-time mobility management position, marking the launch of the Mobility Management Center.

Assuming an hourly wage of \$14.00 per hour (slightly less than the median wage⁵), a three-month, 20-hour per week position with a 30 percent fringe multiplier would cost approximately \$4,750.

Meeting and Office Space

Part-time staff will need office space consisting of a desk, a PC with basic word processing and spreadsheet software, a telephone, access to a printer, and space to store files and other mobility management program materials. The PC should be capable of running the scheduling and dispatch software called for in Strategies 2 and 3. A budget of \$3,000 is estimated for these expenses.

Training

Training is available through a variety of organizations including CalAct, the National Transit Institute, the Community Transportation Association of America, Easter Seals Project Action, United We Ride and the Beverly Foundation. Each organization provides current classes in mobility management and other topics related to coordination of community transportation services. Training offerings are listed on the websites of each organization and are hosted in major metropolitan areas several times each year. CalAct provides trainings throughout California. Registration fees are often, but not always, waived for staff of governments and non-profit organizations. Cost of attendance, therefore, is often limited to travel, per diem, and lodging. Depending on the location, these costs can range between \$800 to \$3,200 per training. For budgeting purposes, we have assumed an annual training budget of \$3,000 for the Mobility Council. Training can be used for Mobility Council members, temporary staff, or for the Mobility Manager.

⁵ According to the United States Bureau of Labor Statistics, median weekly wages in Plumas County for the fourth quarter of 2009 were \$721. This translates to a median hourly wage of \$18.00.

Financial Implications

Program costs include the administrative support staff and office space to house them. These costs can be shared with the volunteer driver program detailed in Strategy 2 and may be provided by existing partner programs.

Figure 5-1 Strategy 1 Expenses

Category	Expense
Reoccurring Costs (Annual Costs)	
Labor - Administrative Support (0.25 FTE)	\$9,500
Office Space (for one staff)	\$1,400
One-Time Costs	
Office Equipment (for one staff)	\$3,000

Action Steps

The following steps detail recommended actions to establish the Mobility Council. These steps basically set the foundation for all mobility coordination efforts in the county by:

- Establishing the Council’s mission and goals;
- Defining partner working relationships and expectations; and
- Working to guide and monitor program implementation

Step 1 – Establish Mobility Council

We recommend the Mobility Council form incrementally over a three-month period of monthly meetings, as follows.

Meeting # 1 – Develop Mission Statement & MOU

The first step in formalizing the Mobility Council will be to host a kickoff meeting to develop and execute the MOU. At least one representative from each potential organizational member should be invited as well as any potential individual members. An interim chair should be appointed by the administrative sponsor to facilitate the meeting. The agenda of the first meeting should focus on defining the mission of the Mobility Council and reviewing and modifying the draft MOU. This meeting should result in the development of an MOU that each prospective member can take to their governing bodies for approval and signature.

Meeting # 2 – Develop Bylaws, Elect Officers, and Organize Sub Committees

Within a month of the first meeting, the Mobility Council should reconvene to review and revise the draft bylaws. The bylaws should address compliance under PUC 99238 (TDA) to allow interoperability between the SSTAC and the MC. The bylaws should also respond to any public meeting requirements set forth by the Brown Act. The outcome of this meeting should be a vote of the council to adopt the bylaws. Once the bylaws have been adopted, they can be amended per the procedures outlined in the bylaws to suit the needs of the Mobility Council. Depending on

how quickly the bylaws are adopted, the Mobility Council may also have time to designate a chair, vice-chair, secretary, and treasurer (if necessary) at this meeting.

Time permitting, the second meeting of the Mobility Council can also be used to establish sub committees and sub committee chairs. During the first year, the most important sub-committees to consider are membership, marketing, and projects. The membership committee will focus on filling gaps in Mobility Council membership, while also keeping track of which organizations have signed the MOU. The marketing/projects sub-committee will publicize the efforts of the Mobility Council through the development of press releases, information sheets, and a Mobility Council website. The projects committee will focus on implementing projects. In addition to the strategies projects identified in this plan, one of the first projects the Mobility Council will need to pursue is a coordinated grant writing effort. This project is described in more detail below.

Meeting # 3 – Inaugural Sub Committee Reports, Refine Bylaws, Develop Schedule for Year 1

A third meeting should be held within a month of the second meeting. This meeting will be the first opportunity for sub-committees to report on progress made during their inaugural month. At this point in the process, there may be enough familiarity with the bylaws to begin modifying them to better suit the needs of the Mobility Council.

After hearing committee reports and opening the floor to potential revisions to the bylaws, this meeting should be used to develop a schedule for the remainder of the year. In Chapter 6, we present a recommended quarterly implementation schedule. This schedule, combined with input from the sub-committees should be used to define the frequency of subsequent meetings. It may be appropriate to schedule Mobility Council meetings on a quarterly basis with sub committees meeting either monthly or quarterly, depending on the level of involvement required by their projects and activities.

Step 2 – Grant Writing

The Mobility Council will need to raise funds to support staff and fund capital purchases when ready to initiate strategies 3 and/or 4. We recommend applying for Mobility Management assistance through Caltrans’s JARC/New Freedom program when appropriate.

According to the Caltrans website, recipients of FTA funds must receive an authorizing resolution from a local government commission or governing board that accomplishes the following

- Designate authority to execute and file all applications, certification of assurances, contracts or agreements on behalf of subrecipient
- Designate authority to submit and approve requests for reimbursement of funds for grant projects

This and other grant writing steps can be found on the Caltrans website:

- <http://www.dot.ca.gov/hq/MassTrans/index.html>

Step 3 – Hire Temporary Staff

The Mobility Council should begin the process of hiring temporary staff as described above in support of Council activities and implementation of Strategy 2. As a means of satisfying the intent of the CDBG funds received for this project, the Mobility Council should work with Work Connection and the Social Services Department regarding CalWORKs to identify local low to moderate income job seekers with an interest in the position.

Step 4 – Oversee Implementation of Projects

Once staff is on-board, the Mobility Council should begin guiding and overseeing the implementation of the strategies identified in this plan, starting with the volunteer driver program outlined in Strategy 2. Overtime and depending on the capacity of staff and members of the Mobility Council, the Mobility Council may also wish to pursue other projects in addition to the strategies identified in this plan. Its role in guiding and overseeing implementation of projects should focus on maintaining momentum and solving problems as they emerge.

Step 5 – Monitor and evaluate

As the Mobility Council matures, one of its major functions will be to monitor and evaluate the success of local coordination efforts. The Mobility Council should adopt a formal plan for monitoring effectiveness. The plan should integrate consistent data collection practices into each of its activities to generate the information needed to track key performance measures. Performance measures should reflect the goals of the Mobility Council, and may include:

- Total annual trips served in the mobility management network;
- Total annual customers served in the mobility management network;
- Average customer satisfaction levels based on periodic customer surveys;
- Total annual hours, miles and cost of transportation service for trips served in the mobility management network by provider;
- Cost per hour, cost per mile, and cost per trip for trips served in the mobility management network by provider;
- Comparisons to current levels of service; and
- Mobility Council member satisfaction levels based on an annual member survey.

The council should prepare an annual report outlining major accomplishments, lessons learned, and challenges faced over the course of the year. The annual report should also track the measures listed above on a year-to-year basis so that progress can be monitored. A special meeting should be held at the end of each operating year (to be determined in the Mobility Council bylaws) in which members review and discuss the year's performance. This will provide an opportunity to revisit the strategic goals of the Mobility Council and make course corrections in the subsequent year.

Strategy 2: Formalize Volunteer Driver Program

Overview

The lack of operating funds limits the ability to deliver transit services, especially on long distance trips. Labor and fuel expenses are the predominant constituents of operating expenses. Volunteer drivers can augment the available services, addressing transportation needs that are extremely difficult to serve if provided by paid staff.

Volunteer drivers are individuals who dedicate time to transport people who lack other mobility options. A sponsoring organization, such as a transportation provider, human service agency or other entity often helps match volunteer drivers with individuals who need rides. A volunteer driver can use their private vehicle but can be reimbursed by the sponsoring agency to defer

some of their costs. Alternately, a volunteer driver can use a vehicle provided by agency sponsoring agency.

Volunteer drivers can also provide a level of flexibility not available with fixed-route or demand response services. For example, drivers may wait for a rider to complete a medical appointment and make a return trip shortly after, as opposed to having the rider wait a long time for the next available public transit trip. Volunteers can also provide a greater level of door-through-door service if appropriate. Volunteer driver programs have proven to be an effective and important resource to help supplement community transportation programs.

Goals and Objectives

The goal of a volunteer driver program is to offer additional transportation options at a reduced cost relative to staff provided trips.

Benefits

The reduced per trip costs of a volunteer driver program will result in a number of benefits for both users of the program and local transportation providers. The principle benefits include:

- Increased availability of trips when other services are not operating or at capacity;
- Greater flexibility for customers needing assistance or drivers to wait for them;
- Reduced demand on other services allowing more time for productive local service if volunteers can provide long distance services; and
- Good community will through the establishment of a corps of volunteers who act as advocates for public transit.

Challenges and Obstacles

The principle challenges associated with volunteer driver programs are described in the following sections. Plumas County specific concerns are detailed in the following Local Application section.

- **Volunteer Recruitment** – Setting up volunteer networks requires time and effort to recruit, train, screen, and reward volunteers. Staff time is required to market the programs to prospective volunteers and make sure they are prepared to meet program and customer requirements. The availability of volunteers is often the limiting factor for many programs.
- **Perception of Prohibitive Insurance Costs** – Using volunteers to drive customers does create risks that may require insurance protection. These risks are similar to those encountered when using staff drivers and can be mitigated with appropriate procedures including ensuring volunteers have adequate personal insurance, are appropriately screened, and receive proper training. In the case of an accident in which a volunteer is driving his or her own vehicle for a volunteer driver program, the volunteer's personal automobile insurance will provide primary insurance, covering the volunteer's vehicle and the first course of recovery from liability claims against both the volunteer and the program administrator. To cover claims beyond the volunteer's liability coverage, program administrators typically carry additional coverage via non-owned automobile liability or umbrella plans which can be invoked if there is an accident and the administrator is found legally liable. Policies providing \$1 to 2 million in liability limits are suggested.

- **Enhanced Scheduling Requirements** – If the volunteer driver program provides ridematching services (scheduling a rider's trip request onto an available volunteer vehicle), the program will need a means for tracking customer requests, available vehicles, booked trips, and reporting program results. If the sponsoring agency is already booking demand response trips for other programs, their existing tools may support volunteer trips, otherwise tools will need to be developed or purchased. Appendix A discusses paratransit scheduling software tools which can also support volunteer trip scheduling.

Examples

The exemplary programs described in this section offer two basic models, differentiated as to whether or not program staff actually match riders with volunteers. The Riverside, CA program relies on riders to find volunteer drivers and make arrangement for their trips. The Clackamas County and MTA programs use program or partner staff to essentially schedule rides with volunteers. The Riverside model is associated with lower administrative overhead and proponents contend that insurance costs are reduced as the program would not have actively put the rider in a volunteer's car if an incident were to occur.

Riverside, CA Transportation Reimbursement and Information Project

Transportation Reimbursement and Information Project (TRIP) complements rail, fixed-route and special public transportation services in Riverside County, California by reimbursing volunteers to transport individuals where no transit service exists or when the individual is too frail, ill, or unable to use public transportation for other reasons. These services are available to seniors and people with disabilities.

The TRIP model relies on customers to recruit volunteer drivers, often friends and family, who are then accepted into the program and eligible for travel reimbursement. Riders are also responsible for filling and submitting the driver reimbursement forms. The program is administered by the Independent Living Partnership, a local non-profit. In 2010 the average cost per trip was \$5.74.

Mendocino County, CA E-Ride

The Mendocino Transit Authority (MTA) recently (May 2011) implemented a new volunteer driver reimbursement voucher program, E-Ride, in Covelo. The new program is a part of MTA's Mobility Management Division that was started with grant funds in August of 2009. This and another program in Laytonville are demonstration projects to provide non-emergency, life-line transportation options.

Once the drivers and riders are accepted to the program, MTA's dispatch department will provide an initial ridematch. The final ride arrangements are made between the rider and the driver.

For a limited time, during the demonstration project, MTA will provide the vouchers free of charge to the enrolled rider. The pilot program will pay for a ride to and from Covelo and Willits or within Covelo. The value of the voucher is \$5.00 one way to Willits and \$1.00 one way within Covelo. At the end of the trip, the rider gives the driver the voucher for the cost of the ride and at the end of each month, the driver turns in the vouchers to MTA who reimburses the driver.

Clackamas County, OR Transportation Reaching People

The Transportation Reaching People (TRP) program serves Clackamas County seniors and people with disabilities who need transportation to medical appointments, personal business, and

shopping. It is administered by the County's Social Services Department. Door to door transportation is provided by volunteer drivers using their private auto. In addition, TRP utilizes two wheelchair vans with paid drivers to transport riders who use wheelchairs. The goal of the program is to assist individuals by promoting independent living and preventing unnecessary institutionalization. There is no set charge for this service. Instead donations are asked from riders.

Volunteer drivers are reimbursed \$0.41 per mile starting/ending at their home locations. This is attractive to drivers who need to travel great distances to pick up their rides. The program uses a MS Access database designed in-house to track clients and schedule trips. Customers need to make trip requests four days in advance to provide staff enough time to find a driver. Senior Centers in some of the remote communities do trip scheduling and ridematching (some with only one-day advance notice requirements) but reimbursement and other programs logistics are handled by the County. The County's transportation and travel training programs are funding by a combination of Older Americans Act, Community Services Block Grant, Non-Medical Medicaid, State of Oregon Business Energy Tax Credits, JARC, STF, Ride Connection E&D, fundraising and donations Drivers are recruited via flyers posted in libraries, Senior Centers and at partner agencies. The County also places notices in Senior Center and agency newsletters. They offer \$25 gift certificates for referrals that become drivers.

Local Application

We recommend the creation of a volunteer driver program to develop a pool of volunteer drivers who provide rides which cannot be completed using other services. Plumas County partners should institute a program with the ridematching element in order to

- Provide a greater level of customer benefits in terms of simplification and reduced rider responsibilities, and therefore greater program acceptance;
- Increase opportunities for placing multiple riders in a single volunteer vehicle, especially on long trips; and
- Increase coordination between providers as they work to recruit program volunteers who would then be looked to as shared resources to be used in an efficient manner.

The program should also provide reimbursements to volunteer driver expenses if funding can be secured. This will help recruit volunteers for longer trips.

A coordinated volunteer driver program entails a number of functional elements to successfully address unmet transportation needs with volunteers. Critical functions address the identification of eligible riders and/or trip purposes, find drivers, pay drivers, match ride requests with available drivers and market the program.

Client and/or Trip Eligibility

The proposed program will likely need to limit the quantity of rides completed in order to stay within established capacity constraints. These constraints will be in the form of available drivers and funding for reimbursements. The Mobility Council will need to set parameters for this program including possible trip restrictions (e.g. medical trips only) and/or client eligibility (e.g. seniors and persons with a disability, or clients in partner programs). Client eligibility would require the development of a rider screening process and the maintenance of a customer database. Budget restrictions may limit the number of long distance trips creating a cap per month and/or the need to prioritize trips.

Driver Recruitment

The availability of drivers, especially those interested in making long distance trips is critical to these programs. The recruitment process includes the solicitation of new volunteers as well as some level of volunteer screening. The screening process should include the creation of a volunteer agreement form to stipulate minimal insurance overages, vehicle requirements, volunteer expectations and adherence to key program procedures. New recruits should receive some training on program procedure, including the reimbursement process, what to do in emergencies, and working with special needs riders. Some programs require each potential driver's vehicle to be inspected. This is a program cost to address safety concerns.

Processing Driver Reimbursements

The program will need to set reimbursement rates (typically something less than the going IRS business travel mileage rate which is currently \$0.51 per mile), and develop a process for reimbursing volunteers. This would require a basic form to document a volunteer's trip and a database to store trip and reimbursement records. Program staff will need to validate volunteer submission and pay them at pre-determined intervals. Alternatively, vouchers could be used allowing riders to "pay" for the driver's services.

Ridematching

Ridematching requires the responding to trip requests and identifying a volunteer driver who may be available to perform that trip. This can be a labor intensive process but can be streamlined with email/internet communications and procedures where drivers sign up for general timeslots. Some programs have developed their own custom tools using simple spreadsheets and databases while others have used standard paratransit scheduling software (see Appendix A).

Program Promotion

The program will have to market its services in order to find potential volunteer drivers and encourage riders to use the service. Concerns about capacity constraints have limited some programs from promoting their services to the general public and instead focus on working with partner agencies. Promotions material can include driver recruitment flyers and web content, as well as volunteer and rider guides/handbooks.

Resources Needed

There are three main components that will be needed to launch the pilot project. Each is described below.

Trip scheduling/ridematching tools

This can be a standalone system built with simple office automation tools or formal paratransit scheduling software. Plumas County partners should use the simpler approach for the short-term implementation of a volunteer driver program, possibility using tools currently in place for existing trip scheduling. In the long term, the volunteer program could be incorporated into a full Mobility Management Center and volunteer trips could be scheduled using enhanced scheduling software (see Strategies 3 and 4).

Staffing

Implementing a new volunteer program will require two primary functions. During startup, the program will require a limited duration position to develop the procedures and supporting material. This could be achieved with a part-time person in about three months. After the program is rolled out, a permanent position will be required to manage volunteers and administer trip delivery. The level of support will depend on the number of trips delivered – probably growing overtime.

Administrative Home

Program staff will need to be physically housed and supported with communications and computer equipment.

This strategy will require space for a second staff person at the administrative sponsor location, but this should be the extent of space requirements for both Strategies 3 and 4. As described in Strategy 1, this should be counted toward in-kind match at approximately \$1,400 in proportionate lease expenses per year.

Financial Implications

The potential to greatly reduce the cost per trip is the largest financial implication of a volunteer driver program. The actual costs will depend on the length of trips delivered, driver reimbursement rates, level of overhead staffing and the number of trips made. Figure 5-2 highlights how the costs of volunteer driver trips typically compare to those of other modes.⁶

Figure 5-2 Sample Trip Costs by Program

Category	2010 Cost Per Passenger
Urban Fixed Route	\$3.89
Small Town Fixed Route	\$5.76
Rural Fixed Route	\$14.34
Demand Response	\$14.38
Commuter Bus	\$15.75
Volunteer Driver	\$3.37

Trip distance will be a key factor in Plumas County and may require significant attention to combining trips in a single volunteer vehicle, reducing subsidies on long trips, and/or capping the number of long trips per month. For example, subsidizing a round trip from Quincy to Reno at \$0.40 per mile will cost the program roughly \$64.

Program costs include the administrative support staff, office space to house them, and the ridematching tools. These costs cover both Strategies 1 and 2 and may be provided by existing partner programs.

⁶ Public Transit Route Performance Reviews, Annual Report for State Fiscal Year 2010, Vermont Agency of Transportation (January 2011) www.leg.state.vt.us/reports/2011ExternalReports/263873.pdf

Figure 5-3 Strategy 2 Expenses

Category	Expense
Reoccurring Costs (Annual Costs)	
Labor - Administrative Support (0.25 FTE)	\$9,500
Office Space (for one staff)	\$1,400
One-Time Costs	
Office Equipment (for one staff)	\$3,000

Action Steps

Step 1 – Set Program Parameters

The Mobility Council will need to set program parameters including who would be eligible based on expected funding levels. The Mobility Council should also set goals for the program in terms of ridership, individuals who can stay in their own homes, etc. These goals will be used to evaluate the program on a regular basis. Program goals will also dictate what data will be collected and reported. Ridership estimates could be based on prior out-of-county ridership, agency client needs, best guesses at unmet needs. These estimates will determine the actual level of staffing required to implement the program. To control costs, the use of part-time support staff will likely require leaving some trip requests on a telephone answering machine and the establishing a multi-day reservation request window. These procedures and time periods should be established during this step. The Council should also set reimbursement rates and decide if donations or fares will be suggested from riders. The notion of asking those who can afford it to “chip in for gas” should be heavily considered.

Step 2 – Identify Program Sponsor

The Mobility Council needs to identify a sponsor, deciding if PRS or another partner is able to support the program during development and early implementation, and beyond if needed.

Step 3 – Resolve Risk Management Issues

Increased insurance costs have been cited for programs doing ridematching but these have not proved to be significant. As discussed in the Challenges and Obstacles section, the sponsoring agency would only require secondary (non-owned vehicle or umbrella) coverage to provide additional liability protection. For example, PRS’ coverage with NonProfits United currently provides \$5 million in such coverage and would cover volunteers driving their own vehicles. This level may drop to \$2 million if PRS no longer operates Reno services, but this level should also be considered adequate. The County would need to provide primary coverage if volunteers are to drive department vehicles. The MC would need to work with the County Risk Management department to assure this coverage is in place and that any volunteer insurance and/or screening requirements are established.

Step 4 – Deploy Ridematching Technology

The program will need to procure or develop the tools to maintain a rider and driver database and support ridematching. This should be in the form of a paratransit scheduling system assuming these resources will be used for additional functions as further mobility management elements are incorporated (Strategies 3 and 4).

Step 5 – Institute Required Procedures and Processes

Program staff will need to develop program procedures including: trip scheduling/ridematching process and support tools; data collection and reporting needs; and reimbursement process.

Step 6 – Produce Supporting Material

Program staff will need to develop supporting material including promotional flyers, rider handbook and volunteer handbook before engaging drivers and riders.

Step 7 – Launch Program

Once all the required elements are in place, program staff will need to start recruiting drivers and promoting the service to riders.

Step 8 – Monitoring and Evaluation

Program staff should regularly report on program usage and costs allowing the Mobility Council to review progress toward the goals set in Step 1 and modify program parameters as needed.

Strategy 3: Ride-Sharing Pilot Project

Overview

Nationwide, ride-sharing is regarded as one of the principle mechanisms for improving the efficiency of community transportation services and is the focus of many efforts to coordinate community transportation services. Organizations can benefit from making their vehicles available to another organization through development of a joint operating agreement that specifically spells out how costs are allocated and how liability is handled.

Goals and Objectives

The goal is to reduce the cost of providing transportation so that existing funds can be used to increase the quantity and quality of service.

Benefits

The principle benefits of this strategy include increased scheduling and operational flexibility, reduced unit costs, and improvements in service quantity and quality.

Depending on how the program is structured, additional benefits may also include increased access to funding and improved leveraging of funding. These secondary benefits are achieved through the introduction of revenue via purchase of service (POS) agreements. This revenue is often eligible as match for Federal Transit Administration (FTA) funds. In fact, SAFETEA-LU – the most recent transportation authorization bill enacted by Congress – allows other federal funds

from outside the Department of Transportation to be used as match for FTA funds. Therefore, even if the source of POS revenue is from another federal program, it can be used to match FTA grants. Thus, organizations are able to stretch their dollars even further by improving their ability to leverage existing funds.

Challenges and Obstacles

There are three principle challenges associated with a ride-sharing program. Each is described below.

- **Perception of Heightened Risk** - From a risk management perspective, organizations are typically concerned that sharing a vehicle with another organization will open them up to increased risk – raising their premiums, or worse, exposing them to uncovered liability. These concerns can be mitigated by dealing directly with the issue of liability.
- **Perception of Funding Limitations** - The second major obstacle to vehicle sharing is related to funding requirements prohibiting certain goods (i.e. vehicles), and services (i.e. transportation) from benefiting individuals who are not eligible recipients of those specific funding programs. While it is true that certain funds can only be used for certain activities, it is generally untrue that these limitations translate to strict prohibitions on resource sharing. In fact, Generally Accepted Accounting Principles and the United States Congressional Office of Management and Budget provide very clear guidelines for organizations to develop cost sharing agreements that enable them to share resources without violating their funding requirements.
- **Enhanced Scheduling & Dispatch Requirements** - In addition to agreements dealing with cost sharing and liability, ride-sharing also often involves an enhanced approach to resource scheduling. In order to achieve operational efficiencies, organizations must centralize some degree of scheduling and dispatch functions. Depending on the size of the area served, the consolidation of these functions can be accomplished in a number of ways.

Examples

Hypothetical Ridesharing Example

The scenario depicted in

Figure 5-4 represents two organizations that purchase service from one another when one organization is able to provide a trip more cost effectively than the other. The presumption is that Agency B has several high-cost, long distance trips that Agency A is able to provide at a lower cost than Agency B. Agency A, however, has several customers who would be better served by Agency B. Both agencies are better off by swapping these trips. This is facilitated through the development of a cost-sharing agreement that allows the agencies to share rides without violating their funding requirements.

Figure 5-4 Hypothetical before and after operations budget

	Before		After		Notes
	Agency A	Agency B	Agency A	Agency B	
Costs					
Administration	\$50,000	\$80,000	\$55,000	\$88,000	Increase due to new administrative requirements of joint operating agreement.
Drivers Salaries & Benefits	122,500	542,500	110,250	488,250	Reduction due to reduction in long trips and better utilization of capacity.
Fuel & Oil	24,000	108,000	21,600	97,200	Reduction due to reduction in long trips and better utilization of capacity.
Vehicle Insurance	8,000	16,000	8,000	16,000	No Change – Increased risk is offset by reduced premiums for improved driver training.
Vehicle Maintenance	72,000	324,000	64,800	291,600	Reduction due to reduction in long trips and better utilization of capacity.
Other Operating Costs	60,000	120,000	60,000	120,000	No Change - assumes fixed costs are unaffected.
Purchased Service	-	-	15,000	30,000	Increase due to addition of POS contracts.
Subtotal	\$336,500	\$1,190,500	\$334,650	\$1,131,050	
Revenue					
Fares	\$67,300	\$238,100	\$66,930	\$226,210	Fare revenue is a function of cost.
Subsidies	269,200	952,400	237,720	889,840	Subsidies decrease with addition of POS contracts.
Contract Revenue	-	-	30,000	15,000	Increase due to addition of POS contracts.
Subtotal	\$336,500	\$1,190,500	\$334,650	\$1,131,050	
Performance Measures					
Total service miles	48,000	216,000	43,200	194,400	Reduction due to reduction in long trips and better utilization of capacity.
Total service hours	3,500	15,500	3,150	13,950	Reduction due to reduction in long trips and better utilization of capacity.
Unlinked passenger trips	14,000	77,500	14,679	77,196	Net increase for Agency A and net decrease for B due to large shift from B to A via contract.
Cost per mile	\$7.01	\$5.51	\$7.75	\$5.82	
Cost per hour	\$96.14	\$76.81	\$106.24	\$81.08	
Cost per trip	\$24.04	\$15.36	\$22.80	\$14.65	
Productivity	4.00	5.00	4.66	5.53	
Subsidy Per Rider	\$19.23	\$12.29	\$16.19	\$11.53	
Customer Satisfaction (1 - 10)	8.00	6.00	8.50	8.00	

Several observations from the hypothetical example above are worth noting. First, the primary benefit of the ridesharing arrangement is a reduction in cost per trip. This is partly due to the improvement in productivity – or, riders per hour – but is also attributable to the improvement in operational efficiencies. Note also that the introduction of POS revenue has a significant impact

on subsidy levels per rider. Last, but not least, customer satisfaction is expected to improve. The assumption here is that riders are more satisfied with service because the coordinated system enables them to travel to more places. The standardization of driver training requirements also helps bring all drivers up to a better overall standard by drawing on the best aspects of both organizations' driver training programs.

DARTS in Dakota County, MN

DARTS shares the operation of a Section 5310 vehicle with the City of Farmington Senior Center and St. Michael's Church. DARTS applied for the 5310 vehicle, paid the local match, and pays insurance and maintenance costs. DARTS operates the vehicle Monday through Thursday. The City of Farmington Senior Center operates the vehicle on Fridays and for special after hours and weekend events, providing the driver and paying for fuel and a maintenance and insurance fee. St. Michael's Church operates the vehicle on weekends using volunteer drivers; they pay for the fuel. All drivers operating the vehicle must complete DARTS drivers' training program and be certified by DARTS.

Local Application

We recommend implementing this effort as a one-year demonstration project with participation from a limited number of interested organizations. Organizations with compatible clientele and similar trip origin and destination patterns should be selected from the agencies currently expressing an interest in mobility coordination. Based on information provided during the April 2011 workshop as well as information provided in the agency assessment survey, we recommend the following organizations as candidates for the demo project.

- Plumas County Veteran Services
- Plumas County Public Health Agency
- Plumas Social Services

Through their participation in the ride-sharing demonstration project, each organization will make its vehicles available for passengers of the other agencies. Whenever one organization is able to provide a trip more efficiently than another, the trip will be assigned to the more efficient vehicle. Ride-sharing in this pilot project is envisioned to be multi-directional meaning each participating organization may send or receive trips to and from the other participating organizations. This is facilitated through cost and liability sharing agreements and enhanced scheduling and dispatch capabilities, as described below.

Resources Needed

There are three main components that will be needed to launch the pilot project: a cost allocation plan for each agency providing services, a joint operations agreement, and enhanced scheduling and dispatch capabilities. These components correspond with the three major obstacles identified above. Each is described below.

Cost Allocation Plan

Each of the three organizations identified above receive funds from a variety of sources. Some of these sources have very specific limitations on how the funds are to be used. For example, Plumas County Veteran Services operates a vehicle that was purchased with funds intended solely for the benefit of veterans. In order for Plumas County Veteran Services to participate in a

ride-sharing program, it will need to demonstrate that its funds have not been used for an ineligible purpose. This can be accomplished by developing a cost allocation plan that enables each participating agency to identify its full costs of providing transportation, thus enabling it to charge other organizations their full share of the cost of shared-ride services.

Appendix G provides an overview of cost allocation and a simplified example of how cost allocation is used in structuring ride-sharing agreements. Additional resources are detailed in Appendix D.

Joint Operations Agreement

The joint operations agreement is used to formalize and enact the ride-sharing project. It spells out how each organization is compensated for services provided and deals directly with the issue of liability by spelling out what happens in the case of an accident. The following topics are generally addressed in a joint operating agreement.

- **Compensation:** The rates identified in the cost allocation plans will be used to establish the amounts participating organizations charge one another. These rates should be spelled out in the cost sharing agreement.
- **Eligibility:** In addition to satisfying individual agency eligibility requirements, the lead agency's insurance provider may require pre-certification of riders from sponsor agencies. The contract should spell out the pre-certification process.
- **Liability Risk:** Agencies engaging in joint vehicle use can overcome concerns regarding increased liability risk by enacting strict controls over use of the vehicle through a joint use agreement. The following topics have been identified by various authoritative sources as the primary elements that should be addressed in joint use agreements to minimize liability risk.
 - Safety Standards
 - Hold Harmless and Indemnification Clauses
 - Commercial Automobile Insurance: Specific areas of coverage should include:
 - Liability limits of insurance coverage
 - Deductibles - It is important to specify which agency, the owner or the operator, will be responsible for paying the out-of-pocket deductible.
 - Uninsured/under-insured motorists
 - Additional insurance to include all participating agencies
 - Physical damage coverage of the vehicles
 - Comprehensive and collision
 - Medical Payments Coverage
 - Workers' Compensation Insurance: Participating agencies will want to ensure that coverage is in place for all employees of the participating agencies.
 - General Liability Insurance: General liability coverage should include liability assumed by written contract or agreement.

- **Hiring and Training Drivers:** Objective driver selection criteria are critical to a good risk management program and should be established and agreed to among all of the agencies participating in the mobility coordination project

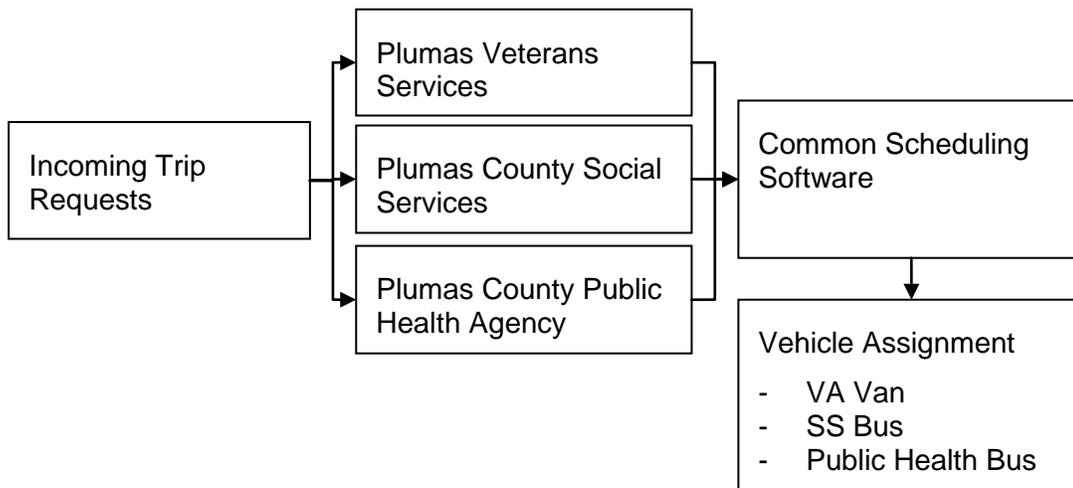
Appendix F includes some sample agreements.

Enhanced Scheduling and Dispatch Capabilities

In order to facilitate efficient scheduling, the participating organizations will need to put in place a mechanism for sharing information about vehicle schedules and service patterns. At a minimum, the participating organizations will need to have the ability to “see” available seats on the other agency’s vehicles. This can be facilitated manually via personal communication, or can be aided by computer software. A fully functional scheduling and dispatch system costs about \$26,000. Appendix A discusses scheduling software and Appendix D provides additional information on scheduling tools and other technologies.

The ride-sharing strategy will need to equip the pilot agencies with access to a common scheduling system allowing each to see information provided by the other participating agencies. This represents a decentralized scheduling and dispatch model in which individual organizations are responsible for incoming trip request. However, by giving each organization access to the scheduling software, they are able to identify the most efficient vehicle for each incoming trip request.

Figure 5-5 Resource Sharing via Decentralized Scheduling and Dispatch



Appendix A discusses scheduling software and Appendix D provides additional information on scheduling tools and other technologies.

Financial Implications

This strategy has minimal financial requirements. If scheduling software is used, an upgrade from an introductory system for Strategy 2 may be required for basic functionality and remote access by all the pilot agencies. But this investment would also cover the needs of Strategy 4 – full MMC operation—and is assumed to be included in Strategy 2 costs.

The costs associated with providing trips will be paid for through existing funding sources. Cost savings should be applied to expand or improve service. Therefore, aside from the up-front capital expenditure associated with software, this strategy will result in no net change in operational expenditures.

Figure 5-6 Strategy 3 Expenses

Category	Expense
Reoccurring Costs (Annual Costs)	
Labor - Administrative Support (0.25 FTE) ¹	\$9,500
Office Space (for one staff)	\$1,400
One-Time Costs	
Office Equipment (for one staff) ²	\$3,000
Scheduling and Dispatch System	\$26,000

¹Costs are additive to those for Strategy 2 which is executed in parallel to Strategy 3

²Costs incurred in execution of previous strategies

We recommend grant funding to support the pilot ride-sharing strategy and possible migration to a full MMC (Strategy 4). FTA grant programs supporting mobility management require a 20 percent local match. The source of match for implementing the strategies in this mobility management plan could come in the form of in-kind services offered by members of the Mobility Council. Figure 5-7 provides an estimate of in-kind match revenue that could be generated by the Mobility Council over the course of a year. Assuming the Mobility Council spends a collective total of 400 hours at an average fully allocated cost per hour of \$50, the Mobility Council would generate \$20,000 in in-kind match.

Figure 5-7 In-kind Services from Mobility Council

Services	MC Member Contributions
Number of meetings/year	4
Average number of people per meetings	8
Average duration of meetings (including travel) (hrs)	2.5
Average time spent outside meetings per person per year per meeting (hrs)	5
Total person-hours/year (product of rows 1-4)	400
Average fully allocated cost/person/hour	\$ 50.00
Total annual in-kind labor contributions (product of rows 5 and 6)	\$ 20,000
Total Annual in-kind office space contributions (one staff person)	\$1,400
Total annual in-kind contributions	\$21,400

In order for in-kind services to be counted as an eligible source of match, the value of match in-kind services needs to be reflected in the total project budget. The overall program budget in Chapter 6 illustrates that the in-kind services of the Mobility Council exceeds the required 20 percent match for Federal Transit Administration funds. This budget could be used to apply for JARC and/or New Freedom funds with no additional revenue required for local match.

Action Steps

Step 1 – Clarify Partners and Roles

A project manager should be identified from one of the participating organizations. Alternatively, a member of the Mobility Council or the Mobility Manager – if one is hired – could fill this role. The project manager should contact each of the other potential participating organizations to verify they are interested in and willing to participate in the pilot project. The project manager should also identify any additional partners that should be included. Each participating organization should identify a point of contact who will participate in the day-to-day planning and implementation of the project. Together, the project manager and the key points of contact for each participating organization will constitute the project steering committee.

Each member of the steering committee will be responsible for specifically identifying the financial and risk management personnel from their organizations who will need to be consulted in developing the cost allocation plan and joint operating agreement. A project contact list should be prepared listing names, roles and contact information so that everyone involved is aware of who to contact for questions about the project.

Step 2 – Kickoff Meeting

Once it is clear who will be involved in the project and what their roles are, the project manager should schedule a kickoff meeting for the steering committee. At the kickoff meeting the participants should clarify their goals and define a common purpose for the demonstration project. Goals may already be well defined within each organization, but there may be important distinctions when the goals of the participating organizations are compared. The goals of each organization may need to be discussed in order for everyone at the table to come to consensus on the objective of the project. For example, if one organization is more interested in reducing costs than expanding service, this goal may conflict with another organization's goal of reducing costs so that service can be expanded. It is important that everyone is on the same page about the goal of the ride-sharing pilot project.

The second objective of the kickoff meeting will be to establish a schedule for implementation. We roughly outline the milestones in this list of action steps, but the steering committee will need to assign specific dates to each action step.

Step 3 – Develop Cost Allocation Plans & Cost Sharing Framework

Each organization that intends to offer service needs to develop a cost allocation plan. This will require consultation with the finance and accounting personnel from each organization. The software and templates identified in TCRP Report 144 (See Appendix D) will be helpful in accomplishing this task.

Once the full costs for each participating organization have been identified, the participants will be able to outline how costs are to be shared. At this point, the project manager should call another meeting with the steering committee to review each providers' cost allocation plans. With this

information in hand, the steering committee should agree on a general framework for how costs are to be shared. The agreement should identify the rate structure used (i.e. cost per mile, cost per hour, or cost per trip, or some other rate structure), and terms of payment (i.e. billing cycles, due dates, and reporting requirements). Again, the information contained in TCRP Report 144 will be helpful in accomplishing this task.

The cost sharing framework will be one of the components of the joint operating agreement.

Step 4 – Develop Joint Operating Agreement

A third meeting should be conducted with the risk management personnel of each participating organization to identify how liability and insurance will be handled as part of the demonstration project. The issue of shared liability should be addressed directly by defining how insurance will be provided and what happens if there are claims against the policies of participating organizations. If possible, it will be beneficial to consult the underwriters of each insurance provider to educate them about the project and seek their input on how the Joint Operating Agreement should be structured. We have provided an outline of several important elements that need to be addressed in the joint operating agreement, above. Nevertheless, qualified legal counsel should be consulted as part of this process.

This step will likely require multiple meetings and may take several months to complete.

Once the language dealing with shared liability is agreed upon by all parties, the steering committee should bring everything together to finalize the Joint Operating Agreement. The purpose and other explanatory information should be defined in the front matter of the agreement. The cost sharing framework should be incorporated into the compensation section. Once combined, the agreement should be circulated among the participating organizations for final review and signatures.

Step 5 – Procure Scheduling and Dispatch Software

After signing the joint operating agreement, the project manager should initiate procurement of the additional scheduling and dispatch software functionality needed to support the demonstration project.

The procurement should include setup, training and testing so that all partners are up to speed on how to use the software before formally launching the demonstration project.

If the steering committee is confident that at least two of the participating organizations will sign the Joint Operating Agreement, it may be possible to conduct this step concurrently with steps 3 and 4.

Step 6 – Launch Pilot Project

Once at least two parties have signed the Joint Operating Agreement and the dispatch software has been installed and tested and staff trained, the steering committee should announce the official launch of the pilot project. The event should be closely coordinated with other outreach activities pursued by the Mobility Council. This will help ensure consistent messaging and will serve as a platform for the Mobility Council to spread information about its broader efforts to improve access and mobility.

Step 7 – Monitoring and Evaluation

After operating the service for several weeks, the Mobility Council should meet to discuss initial experiences. A brief survey should be prepared and distributed among riders. This could be done as an on-board survey conducted on the vehicle during a regularly scheduled trip. It could also be mailed to riders who frequently use the service. The survey should seek input on the customer's experience.

Similarly, after a standard operating period has lapsed (such as a quarter or fiscal year) the project leaders should review cost and service information to determine whether cost savings were actually achieved. This should be done by comparing actual operating costs before and after consolidation of service. The 'before' period data should reflect the cost of service when the participating organizations were operating independent transportation programs. The 'after' data should reflect implementation of the shared service. A comparison of the two periods should provide important insight into the actual costs and benefits of coordinating.

Using information collected from customers and from operations will allow the project leaders to identify areas that need improvement. If the data show that the goals of lowering overall costs while improving the quantity and quality of service were achieved, the steering committee should be sure to publicize the results.

Strategy 4: Incrementally Build a Mobility Management Center

Overview

An economy of scale occurs in terms of reducing program costs, eliminating duplicated efforts, and sharing knowledge when moving various mobility management elements together into a single Mobility Management Center (MMC), staffed by dedicated personnel. A MMC provides the public with a common "one-stop" point of contact for initial inquiries and community partners with a means for sharing resources – ranging from trip booking activities to physical assets.

A call center is often viewed as a key element of a MMC. There are two main functions within this role: 1) information and referral; and 2) centralized trip scheduling. MMC staff is also available to staff other programs including volunteer drivers, vanpools, and travel training. MMC personnel regularly staff coordinating councils by running meetings, researching potential new programs, networking with regional state coordination efforts, etc.

Goals and Objectives

Bring all mobility coordination efforts into one program, housed in a Mobility Management Center.

Benefits

A full MMC can provide dedicated resources to investigate and implement various programs that benefit both end-customers and partner agencies. The principle benefits include:

- One-stop public information clearinghouse when requesting information and trips;

- Dedicated staff to oversee multiple mobility management activities and support the Plumas County Mobility Council;
- Greater efficiency of administrative staff having multiple programs to allocate time to; and
- Means for integrating county information with larger systems like 211.

Challenges and Obstacles

The principle challenges associated with mobility management centers are:

- **Sustainable funding** – The increased level of activity with a MMC typically correlates with increased staffing needs. Some funding sources available to meet these needs are targeted toward pilot or startup costs. For instance, the New Freedom funds are intended to support new services and some programs have had difficulties renewing this funding stream after one or two two-year cycles. Dependence on these sources for startup will require the identification of additional sources to sustain operations.
- **Enhanced Scheduling Requirements** – As with the previous strategies, the MMC with a full call center will require some investments (time as well as money) in order to enhance scheduling and dispatch (management of vehicle on day of trip) technology. It is natural for some agencies to want to maintain some control over the booking of transportation for their clients. Current scheduling systems support a range of options for the call center, some allowing active participation by partner agencies including:
 - Call Center handles all trip requests whether from end users or their case managers. Trip requests in this case are made via phone calls, email communications or web-based requests.
 - Alternate models allow partner agencies to submit trip requests in batch (many requests at once). This requires the development of interagency protocol to define a data exchange detailing the trip parameters and allowing electronic transfer into the scheduling system without manual processing.
 - Most systems also support the configuration of scheduling workstations (“seats”) at partner agencies. This effectively makes partner agency staff schedulers, but will require some training on the use of scheduling tools. This is similar to the approach defined in Strategy 3.

Example

Many mobility managers are associated with single agencies, taking on a coordinating role for their agencies while working with other agencies and programs. Stand alone MMCs were originally developed in larger urban areas, but the model is applicable in all communities. Ride Connection is highlighted in this section as it provides many of the essential mobility elements under one roof, as do many of the Consolidated Transportation Services Agencies (CTSAs) in California’s larger urban areas.

Ride Connection

Ride Connection is a private non-profit organization located in Portland, OR that coordinates transportation operations of 33 small community based providers of elderly and disabled transportation. The partner network includes a variety of human service organizations serving elders and people with disabilities throughout the metropolitan area including the local chapter of

the American Red Cross, faith-based groups, senior centers, residential care facilities and multi-service centers.

This network operates a fleet of approximately 100 accessible vans and small buses, in addition to volunteer-owned vehicles. Approximately 600 drivers, of whom two-thirds are volunteers, provided over 371,500 E&D rides in FY08, an increase of 4.1% over FY07. Ride Connection volunteers provided approximately 52,000 rides in FY08.

Provider Network (Partners) Support

Ride Connection provides the following support services for its partners:

- Service coordination between partners; service scheduling for some partners
- Driver training and continuing education
- Call center information and referral services
- Fundraising
- Grant writing and serving as conduit for state and federal funds
- Volunteer recruitment and placement
- Advocacy
- Equipment purchases and coordination of shared use vehicle programs; offers vehicle insurance
- New service design
- Contract administration, technical assistance and performance reporting, customer service monitoring

Information and Referral and Scheduling

Customer Service Representatives at Ride Connection's Service Center provide information on all available travel options for elders and people with disabilities in the region. The Service Center also schedules and dispatches rides for some of the service partners. Ride Connection now schedules all of the community-based rides in Washington County and over half of the community-based rides in Multnomah County.

Service partners who are currently not receiving scheduling and dispatch assistance from the Ride Connection Customer Service Center participate in the information and referral program, which allows customers to enroll by calling the Customer Service Center phone number to be referred to the service partner in their area.

Travel Training

Ride Connection also provides the RideWise travel training program, delivering:

- Assistance in developing individual transportation plans, which identify the service that works best for a particular trip—fixed route, LIFT, or Ride Connection partner;
- Personal and group orientation in boarding vehicles;
- Travel training on fixed routes for individuals or community groups;
- Ride Ambassador peer travel training program with volunteers;

- Support of agency professionals currently providing travel training in the community.

Ride Connection programs are funded with JARC, New Freedom, TriMet, 5311 federal rural assistance, state Special Transportation Funds, Aging and Disability Services, fare donations, fund raising, Oregon Business Energy Tax Credits, and charitable contributions

Local Application

We recommend building on successful startups of the volunteer driver and ridesharing programs, and evolving the mobility management functions into a centralized center. Initially, the main functions of the MMC will be to provide information and referral services and to provide a central call center for all trip requests from agency staff and the public. Additionally, the MMC will house a full-time Mobility Manager who can support the Mobility Council and its ongoing activities.

The center can be thought of as a virtual organization. While a sponsoring agency may physically house MMC staff and act as the MMC's fiduciary agent (be the official grant applicant, accept donations, pay salaries, etc.), the MMC should operate as an independent entity under the direction of the Plumas County Mobility Council.

The MMC will be staffed by the County's Mobility Manager. This full-time position will be the lead in supporting the Mobility Council, administering the day-to-day operations of the MMC, directing support staff as needed, augmenting support staff as needed (handling incoming calls), and advancing future coordination strategies as appropriate. Support staff will be required to assist customers by taking and processing calls requesting information or trip requests. These positions are detailed in the Financial Implications section for this strategy and summarized in the Implementation Chapter.

Primary Functions

The MMC should provide the following primary functions.

Information and Referral

The MMC should staff a call center to accept calls from the public seeking information about transportation options in Plumas County. This will require the maintenance of a database on current services and working with local agencies to keep it current. This will also require knowledge of services in other counties for out-of-county travel and/or access to regional databases. The PRS resource directory should be a good source of data on local services. The local information should also be integrated with the state's 211 system as appropriate.

Centralized Trip Scheduling and Dispatch

Building on the Strategy 3 pilot, the MMC Call Center should schedule trips for as many vehicles as possible to maximize their efficient use. As part of this, the MMC should schedule volunteer driver trips and Plumas Transit deviations in conjunction with agency trips. The MMC should also be the first responder for day-of-trip dispatch needs, including customer requests, mechanical breakdowns, schedule delays, etc. This will free up agency staff from all but emergency situations and help identify options from across all providers.

Centralized Data Reporting and Planning Support

The use of enhanced scheduling tools (see Appendix A) greatly facilitates the generation of data reports as required for the Mobility Council and partner agencies (to evaluate program

performance) and for funding agencies. These tools maintain records on trips made and can produce custom reports tailored for CalTrans, other funders, and local needs.

MMC staff can also support planning efforts including needs assessments and grant writing in support of system maintenance and/or expansion.

MC Support

The Mobility Manager should support the Mobility Council on an ongoing basis. These duties include setting the Council's calendar, preparing meeting agendas and follow up on Council decisions. The Mobility Manager and MMC support staff are also available to take on special projects aimed at furthering mobility coordination in the county.

Optional Functions

Once the primary functions of the MMC are up and running, the MMC should be able to assist the Mobility Council in determining a course of action to expand MMC functionality. This will require some investigation and evaluation on the staff's ability to take on additional duties if appropriate. Optional functions include the following.

Centralized fueling and/or maintenance

The Mobility Manager can help identify local options for centralized services and work with the Mobility Council to determine where and when they would be appropriate. If such programs are moved forward, they will require the formation and administration of contracts/agreements between the fuel and maintenance providers and the transportation providers.

Travel Training

The MMC can help set up and deliver travel training services if community members need assistance in using fixed-route or other services. MMC staff can help put together training programs/material and deliver directly to the public or work with agency staff to assist clients.

Vanpools

Vanpools remain a viable option for work commutes to areas not serviced by transit or at times when other services are not available. Capital funding is typically available for the purchase of vans, but a critical mass of workers is required to share the operating costs (fuel, maintenance, insurance, etc.). MMC staff can assist in identifying possible vanpool "routes," help fill seats on a van, and administer the collection of fares and maintenance of the vans.

Resources Needed

As this strategy evolves programs developed in previous strategies, the resource needs are expansions of earlier needs. These include:

Trip scheduling/ridematching tools

The MMC will require a basic paratransit scheduling and dispatch system. Assuming the MMC call center handles all trip requests, this will be a much simpler configuration than what is used in Strategy 3 where agency staff shared scheduling responsibilities. Therefore, all the required technology resources should be in place upon execution of Strategies 2 and 3.

Staffing

The MMC will need to be staffed by a full-time Mobility Manager and part-time administrative support staff. The support position will grow to 0.75 FTE as the MMC ramps up operations and takes over functions provided by the volunteer driver program and the ridesharing pilot (see Chapter 6 for details on the implementation plan).

The Mobility Manager's responsibilities include:

- Support Mobility Council;
- Oversee MMC staff and operations;
- Future mobility coordination program development; and
- MMC administrative staff backfill (assisting at peak times, during staff breaks or days off).

The administrative support staff's responsibilities include:

- Responding to Information & Referral calls;
- Responding to trip requests and scheduling rides;
- Handling dispatch activities in response to day-of-trip situations; and
- Supporting the Mobility Manager as required

Administrative Home

Program staff will need to be physically housed and supported with communications and computer equipment. It is expected that these functions and staff will continue to be supported at the primary sponsor's location.

Communications Infrastructure

The dispatch functions will require communications with all vehicles in operation. The primary providers use cellular communications and no special resources will be required. Inclusion of Plumas Unified School District vehicles may require access to a two-way radio as the dispatch center.

Financial Implications

The incremental staffing needs required for this strategy represent the largest financial impact. For budgeting purposes, the primary expenses are detailed in the following table. The Mobility Manager wages and benefits are budgeted at \$65,000. The administrative support wage & benefit information along with the office expenses are those used for the prior strategies. Similarly, the technology needs are equal to those required for Strategy 3.

Figure 5-8 Strategy 4 Expenses

Category	Expense
Reoccurring Costs (Annual Costs)	
Labor - Mobility Manager (1 FTE)	\$65,000
Labor - Administrative Support (0.75 FTE)	\$28,400
Office Space (for two staff)	\$2,800
One-Time Costs¹	
Office Equipment (for two staff)	\$6,000
Scheduling and Dispatch System	\$26,000

¹Costs incurred in execution of previous strategies

Action Steps

Step 1 – Develop Information and Referral (I&R) Operating Environment and Procedures

The Mobility Manager will need to identify and/or create the data stores so that staff responding to I&R calls can readily access the required information. This will likely be a combination of a custom database (especially for local services) and internet sites. The PRS resource direction is a good source of information that should probably be ported over. Procedures need to be put in place to: 1) maintain this data over time responding to changes in available services; and 2) access the appropriate data when responding to customer calls. Procedures are also required to specify the nature of referrals and how customers are “handed-off” to other organizations.

The Mobility Manager should understand the California 211 system and its requirements for inputting and maintaining local data. The systems set up for the MMC should be compatible with these requirements where possible to incorporate the 211 system as an external I&R tool.

Step 2 – Hire and Train Administrative Support Staff for I&R

After implementing the I&R program infrastructure, the Mobility Manager and Mobility Council will need to hire and train staff on the new systems and procedures. This may be a new hire or the addition of duties to staff supporting the volunteer driver program as they are already responding to customer inputs and assumed to be in the same physical location.

Step 3 – Trip Scheduling Procedures and Agreements

Building on Strategy 3, the Mobility Council will need to work with partner organizations to determine what vehicles will be available to the MMC schedulers. Agreements and procedures will need to be put in place dictating:

- What vehicles and drivers are available;
- When they are available;
- What trips can be co-mingled during these periods; and
- What costs need to be allocated between partners.

Step 4 – Hire and Train Administrative Support Staff for Scheduling and Dispatch

This is a further expansion of the MMC staff roles. It's likely that this step will rely on existing staff, adding to their hours and training them on their new duties.

Step 5 – Monitoring and Evaluation

The Mobility Manager should regularly report on program usage and costs allowing the Mobility Council to see if expectations are being met.

Step 6 – Identify and Secure Long-Term Funding

The JARC/New Freedom funding applied for in Strategy 1 may not be available on an ongoing basis. This may be particularly true of the New Freedom funds if the State prioritizes new programs that are implementing new services for these funds. Therefore, the expansion of additional programs within the MMC may help make it more competitive for grants in future cycles.

The Mobility Manager should be charged with identifying new sources of funding to sustain or expand MMC operations. In addition to the JARC and New Freedom grant programs, the following opportunities should be explored:

- FTA non-urbanized (5311) – these funds are available to support capital and operations, but may be extremely competitive in the State. Most of these funds in California are distributed on a formula basis and the County may have to choose funding toward the MMC, especially if MMC programs result in benefits for Plumas Transit and other services
- Tribal Transit Program (5311(c)) – a set-aside of 5311 funding specifically for Tribal programs including mobility management functions. This program does not require a local match.
- TDA – The County may choose to allocate some TDA funding toward the MMC, especially if MMC programs result in benefits for Plumas Transit and other services. Use of state funding will also help leverage more federal funding if larger local matches are required.
- STA – While the State Transit Assistance program has been defunded in recent years, there are efforts to make this a viable option again and should be monitored.

- Local contributions – If MMC program evaluation quantifies financial benefits to local partners, the Mobility Council should consider asking for contributions commensurate with these benefits. In addition to providing operating income, these contributions add to the local match and leverage more federal funding and make grant applications stronger by showing local commitment.
- Non-transit federal grants – As MMC programs will provide ancillary benefits, non-transit programs, like Older Americans Act Title III B, should be explored.
- Private foundations – Many foundations offer support for rural and small community transportation programs. Many recognize the connection between providing key social services or improving community health and offering transportation options. Several private foundations have a regional focus and target communities within their geographic area.

Step 7 – Plan for Additional MMC Programs

After implementing the primary programs, the Mobility Council should direct the Mobility Manager to explore and implement additional programs. As mentioned, additional resource sharing, travel training and vanpools are potential areas for MMC involvement. By continually monitoring community needs and engaging local stakeholders, new coordination opportunities should arise. Continual expansion of the MMC should provide more benefits for customer and providers, as well as make the MMC more attractive to potential funders by demonstrating service to a larger and broader customer base.

Chapter 6. Program Implementation

In summary, the report highlights the desire and capabilities of key Plumas County stakeholders to take on and accomplish key mobility coordinating strategies. These goals for mobility coordination will be achievable by embracing the basic mobility management techniques described in Chapter 3 and the implementation steps highlighted in Chapter 5. Successful deployment of a Mobility Management Center is contingent on the presence of a critical mass of services and resources to coordinate with. The strategies outlined in this report help build a foundation for the County's transportation providers and other stakeholders to build upon and methodically evolve toward a Plumas County Mobility Management Center.

With the development of the Plumas County Mobility Council, local leaders will have active roles in shaping these actions and evaluating progress along the way. This will help focus limited resources on priority coordination tasks while incrementally adding mobility management elements and making sure no one is biting off more than they can chew.

It will be important to keep an eye on the bigger picture of a multi-faceted Mobility Management Center in order to coordinate more services and functions. In turn, this will gain the most efficiencies and show a greater impact when dealing with funders.

This chapter summarizes the information outlined in Chapter 5 and presents a unified plan for implementing each of the strategies as part of an overall program. The chapter is organized into two main sections:

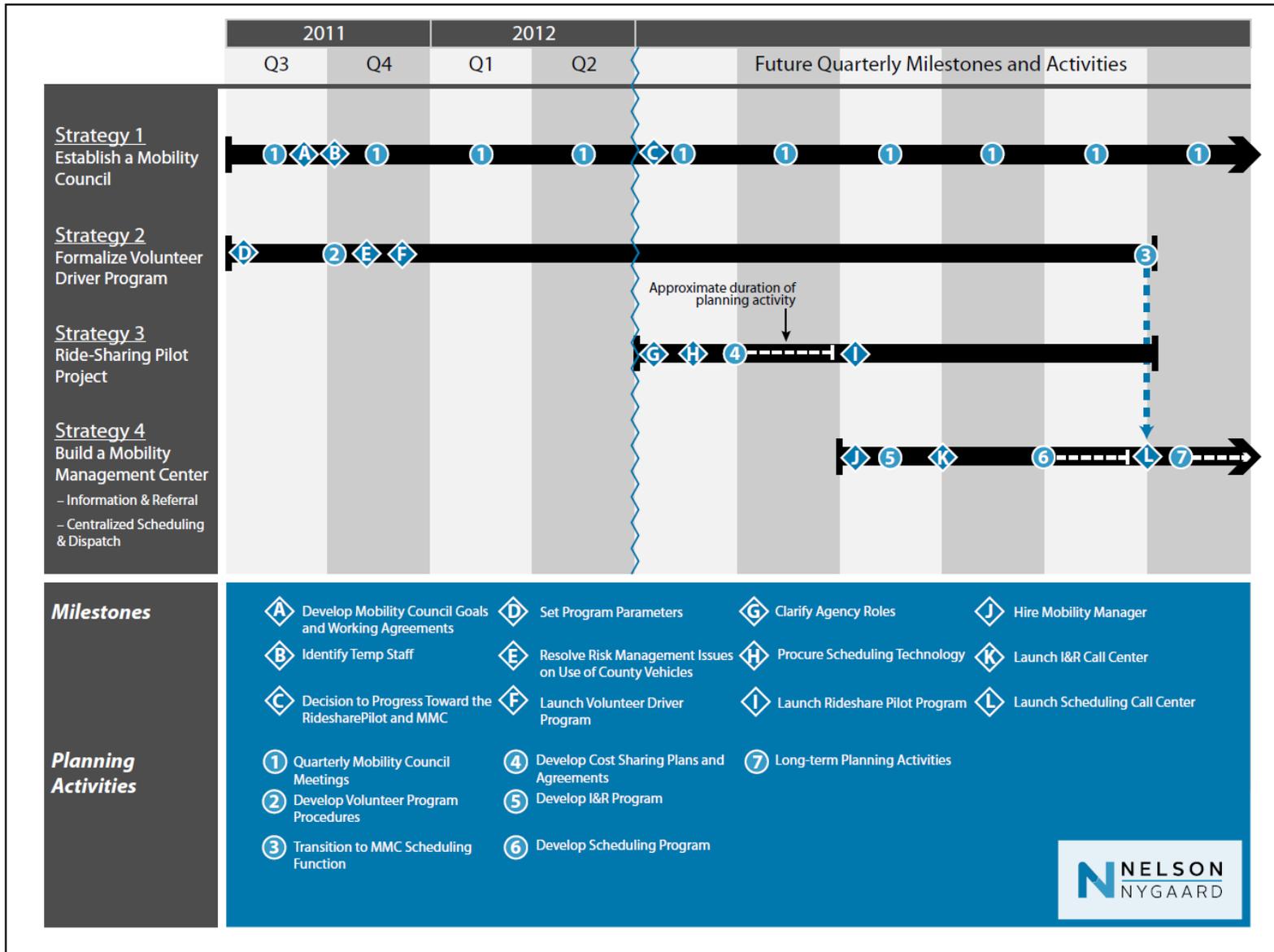
- **Program Implementation Schedule** – the program implementation timeline sets each of the strategies into a prioritized workflow showing key milestones and relationships between the strategies.
- **Program Budget** – the program budget is a multi-year financial plan that lists each expense and revenue requirement for each strategy by year.

Implementation Schedule

Figure 6-1 illustrates the chronological flow of events as each of the four strategies is implemented. The diagram shows when each strategy is developed and executed along with staffing requirements and major action item milestones and planning activities. The figure also conveys the interrelationship between strategies and how they build on each other to develop broader mobility management functions. The circle and diamond icons represent key milestones and planning activities, respectively, that will need to occur to generate the most utility for the community's mobility needs. The vertical dashed linkages represent interdependent implementation events.

Figure 6-1 Mobility Management Program Implementation Timeline

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Mobility Management Program Budget

The program budget pulls together all of the cost and revenue information for the strategies outlined in Chapter 5. The following table highlights expenses incurred program implementation and the revenues needed to cover these.

Figure 6-2 Mobility Management Program Implementation Budget

	Short-Term Strategies		Long-Term Strategies		
	2011	2012	Year 1	Year 2	Two-year Program of Projects
Expenses					
Labor - Mobility Manager			\$32,500	\$65,000	\$97,500
Labor - Administrative Support	\$2,400	\$9,500	\$18,900	\$28,400	\$47,300
Office Space	\$350	\$1,400	\$2,800	\$2,800	\$5,600
Office Equipment	\$3,000	\$3,000	\$6,000		\$6,000
Scheduling System			\$26,000		\$26,000
Total Expenses	\$5,750	\$13,900	\$86,200	\$96,200	\$182,400
Revenues					
Local In-Kind	\$10,750	\$33,900	\$22,800	\$22,800	\$45,600
Local Cash					
Federal Grants			\$86,200	\$96,200	\$182,400
Other Revenues					
Total Revenues	\$10,750	\$33,900	\$109,000	\$119,000	\$228,000
% Local Match					20%

Notes: All short-term expenses are met with In-kind contributions
 0.25 FTE Admin/Support needed for short-term strategies and first 6 months of long term strategies
 1 FTE Mobility Manager and 0.75 FTE Admin/Support needed for long-term strategies starting 6 months into implementation
 Annual wages and benefits assumed at: \$65,000 for the Mobility Manager and \$37,900 for the administrative support staff
 Annual office space and support expenses assumed at \$1,400

APPENDIX A

AUTOMATED SCHEDULING SOFTWARE

Scheduling and Reporting Software

The use of scheduling and reporting (or Computer Aided Dispatch (CAD)) software provides a number of benefits but can come at high costs. The benefits to Plumas County providers would primarily be in the areas of efficient trip scheduling, and accountability and reduced administrative costs to generate reports. The costs would entail actual costs to procure the software and the efforts to train staff on how to use and maintain the software.

Benefits

Many of the popular software packages are offered as tiered products ranging from manual scheduling (call taker assigns riders to vehicles) to semi-automated (or computer assisted) scheduling to fully automated scheduling (computer determines vehicle assignments for maximum efficiency). Many vendors allow a migration path where lower tiered products are easily upgraded with customers only paying for the new features. Common to all product levels are client and data management functions that help manage client information, and collect and report data on vehicle operation, passenger trips and billing.

Reporting Tools

The need for consistent, flexible, accurate and easy to use data management is the primary reason small- to mid-sized transit providers use scheduling and reporting tools. On the front end of the process, these tools maintain a database of riders including characteristics such as:

- Home locations;
- Common trip destinations;
- Regularly repeated trips;
- Eligibility status; and
 - Fare levels or program discounts if appropriate

These features help schedulers easily create trip sheets and vehicle manifests. On the backend, the rider information and trip logs facilitate the generation of reports including those required for: CalTrans reporting requirements; and cost sharing analysis between providers. Most of the software applications support brokerage operations and/or Medicaid transportation where detailed reports are required to show the allocation of trips by rider for multiple programs.

If the standard reports do not meet the needs of the Mobility Council or individual providers, the software usually allows the end user to customize reports, or the vendors can create unique reports as part of the installation process or part of their maintenance program. By automating the these aspects of data management, providers can expect to see lower administrative costs relative to fully manual procedures, but at an ongoing cost to maintain the scheduling and reporting software.

Scheduling Features

For small systems, automated scheduling may not be appropriate. Manual scheduling works well when the schedulers know their community and core group of riders. This is especially the case if many of the rides are made on a regular, reoccurring basis. This may be the case for the current operations.

Scheduling and dispatch staff associated with a new central call center may not be as familiar with riders across all the participating programs. In this case the use of semi-automated or computer-assisted scheduling may prove beneficial. These tools can provide mapping features to: aid in the identification of trip origins and destinations; calculate trip times; and generally help verify that shared rides will operate properly. The greater the amount of automation, the greater the complexity inherent to the application, requiring more staff training and set up time. Many agencies have found themselves with high-end tools, but only using them for basic operations. Most vendors offer an initial training running between three and six days. Expanded training is suggested when staff are not experienced with general scheduling and dispatch procedures. Up to two weeks of training is often suggested in these cases.

Earlier research⁷ indicated that medium sized systems (those with ten or more demand-response vehicles in operation) benefit the most from semi-automated applications. Volunteer cars can be treated like a paratransit vehicle and booked using the same system. Systems providing more than 100 trips per day are more apt to realize the greatest benefits.

Program staff use scheduling and dispatch software on individual computers or “seats.” Staff at client or partner organizations can use remote seats, allowing them to view vehicles in use and book trips along with the primary schedulers at a call center.

Costs

Scheduling and reporting systems have both upfront costs for software licenses and computer hardware, as well as ongoing annual maintenance fees to cover application updates/upgrades and ongoing customer support. Some funding programs, including grant programs in allow the bundling of one or two years of maintenance into the initial capital expenditure, reducing the burden on operating revenues.

Software license costs for computer-assisted scheduling systems are in the range of \$20,000 to \$30,000. Many of these basic systems come with up to four seats allowing multiple schedulers and dispatchers to run a system. Additional seats can be added for roughly \$1,000.

Semi-automated applications can cost between \$35,000 and \$45,000. Fully automated tools, allowing for the batch processing of a large number of ride requests, can cost \$56,000 and above.

The licensing costs usually include a basic level of training. Expanded training (for special applications or for new staff) is often available for an additional \$800 to \$1,000 per day. Annual maintenance fees are either set as flat fees or a percentage of the license costs. These typically range between \$3,000 and \$4,000 a year. Programs that include software upgrades (as opposed to just updates for bug fixes etc.) or those that provide more intensive customer support are prices at the higher end of the range.

Current quotes for small-system packages are from Mobilitat (www.mobilitatsoftware.com) and RouteMatch (www.routematch.com). Trapeze (www.trapezegroup.com/solutions/ct_novus.php) has developed a product for small systems called NOVUS and other vendors have a variety of products including Shah Software (www.shahsoftware.com) and CTS (www.cts-software.com).

⁷ TCRP REPORT 76 Guidebook for Selecting Appropriate Technology Systems for Small Urban and Rural Public Transportation Operators Transportation Research Board, 2002.

APPENDIX B

AGENCY ASSESSMENT SURVEY INSTRUMENT AND SUMMARY

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Below is a sampling of key results extracted from the Plumas County Agency Assessment Survey. The survey was developed in order to develop a better sense of the organizational strengths and weaknesses presented by the county’s public transit and human services transportation providers. The Agency Assessment was disseminated using Survey Monkey between April 8, 2011 and April 20, 2011. The survey’s agency response rate was 80%. The following organizations that are consider area transportation providers, funding sources, or those that purchase trips for specialized trip making were included in the agency assessment:

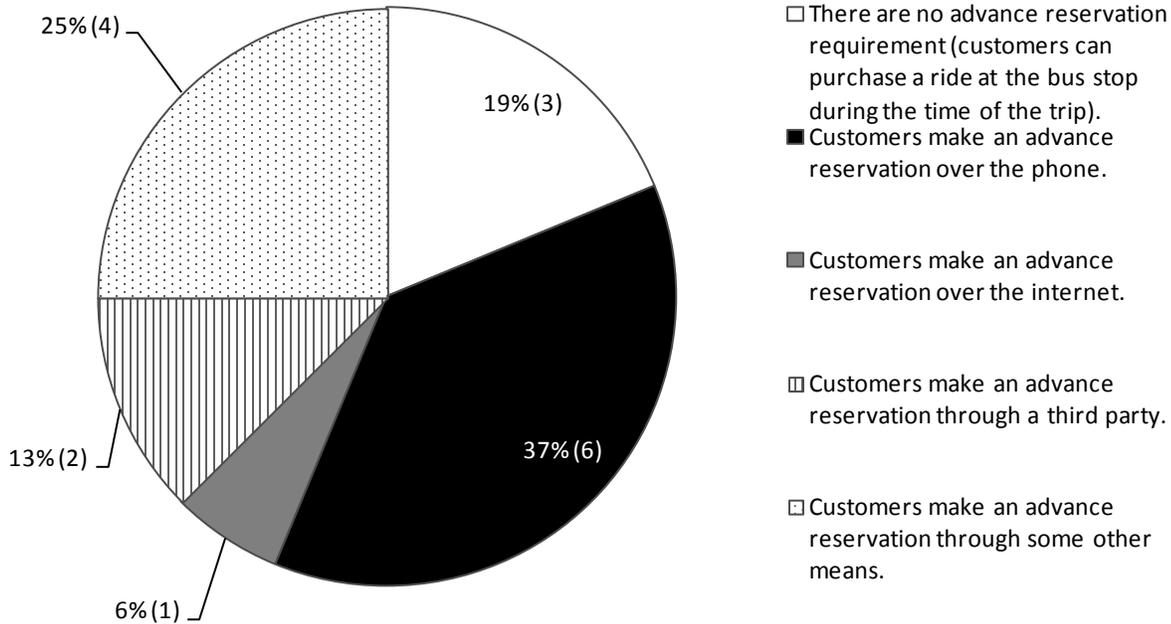
- Plumas Rural Services
- Plumas Unified School District
- Plumas County (including Public Health Agency Senior Services Transportation, Veterans Service Office, and Social Services)
- Environmental Alternatives Family Foster Agency
- Plumas Crisis Intervention and Resource Center
- Plumas District Hospital
- We Care A Lot Foundation
- Greenville Rancheria
- Alliance for Workforce Development, Inc.
- Roundhouse Council
- Far Northern Regional Council
- Mountain Circle
- Tribal Temporary Assistance for Needy Families (TANF)
- Eastern Plumas Health Care
- Seneca Healthcare District

The survey asked a variety of background questions as well as questions deciphering the extent of how each organization facilitates transportation throughout the County and out-of-County. The following compilation of tables summarizes the key questions related to mobility coordination and essential elements that help to determine mobility management feasibility.

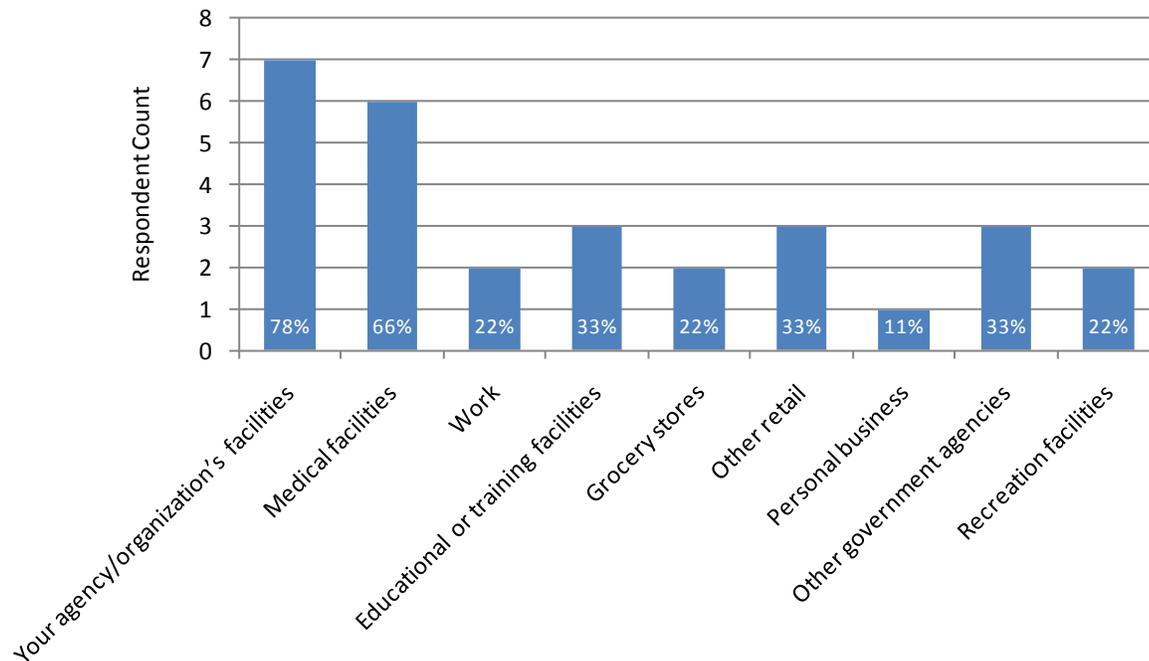
Q2. What type of function or role do you fulfill as a transportation provider? (Check all that apply)

	Public transit (available to the general public)	Client-based transit (available only to clients/participants in one of your programs)	Transportation operator (directly administer transit services, providing in-operation vehicles)	Volunteer drivers (recruit and manage volunteer drivers)	Fund/subsidize transportation services (contribute funding toward transit service or purchase fares for clients/customers)	Provide information and referrals (I&R – currently refer callers to other providers where appropriate)
Percent	15.4%	61.5%	7.7%	15.4%	30.8%	69.2%
Count	2	8	1	2	4	9

Q4. How do clients/customers access your transportation services? (Choose all that apply)



Q6. What kinds of destinations do you serve? (Check all that apply)



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Q11. What is the size of your staff working on transportation services?

	Number of individual staff members dedicated to transportation	Number of individual staff members who work on transportation at times	Total Full-Time Equivalent (FTE) positions working on transportation
Plumas Rural Services	No non-Plumas Transit staff	Up to 15 non Plumas Transit staff	6 FTE
Plumas Unified School District	27	6	21 FTE
Senior Transportation (Plumas County Public Health Agency)	Five	Two	2.24 FTE
Environmental Alternatives FFA	2	3	0.5 FTE
Plumas Crisis Intervention and Resource Center	0	0	0
Plumas County Veterans Service Office	2	n/a	0
Plumas County Social Services	n/a	Approximately 7 including drivers	n/a
Plumas Transit	9-11	n/a	8 – 10 FTE
Plumas District Hospital	0	0	0

Note: Greenville Rancheria, We Care A Lot Foundation, and Alliance for Workforce Development, Inc. did not submit responses for this question.

Q17. Does your organization’s availability of equipment, staff, and technology restrict your capacity to provide service? Indicate the degree to which each resource is constrained.

	Vehicles	Paid Drivers	Volunteer Drivers	Administrative Staff	Reservation/Scheduling Capabilities	Dispatch Capabilities	Other
Plumas Rural Services	High	Low	Low	Low	Low	Low	-
Plumas Unified School District	Medium	Medium	-	Low	Medium	Medium	-
Senior Transportation (Plumas County Public Health Agency)	Not a Constraint	Not a Constraint	-	Not a Constraint	Not a Constraint	Not a Constraint	-
Environmental Alternatives FFA	Medium	Medium	Medium	Medium	Medium	Medium	-
Plumas County Veterans Service Office	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	High*
Plumas County Social Services	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	Not a Constraint	Medium**
We Care A Lot	-	-	-	-	-	-	Medium***
Plumas Transit	Medium	Medium	-	Medium	-	-	-

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*Comment from respondent: "Not practical for runs to Reno with 1 passenger"

** Comment from respondent: "No person is dedicated to transportation management in this department, which may put time constraints on the individual who has to deal with issues."

*** Comment from respondent: "All providers that I have worked with our feeling constraints due to the current budget situation."

Note: Plumas Crisis Intervention and Resource Center, Greenville Rancheria, Plumas District Hospital, and Alliance for Workforce Development, Inc. did not submit responses for this question.

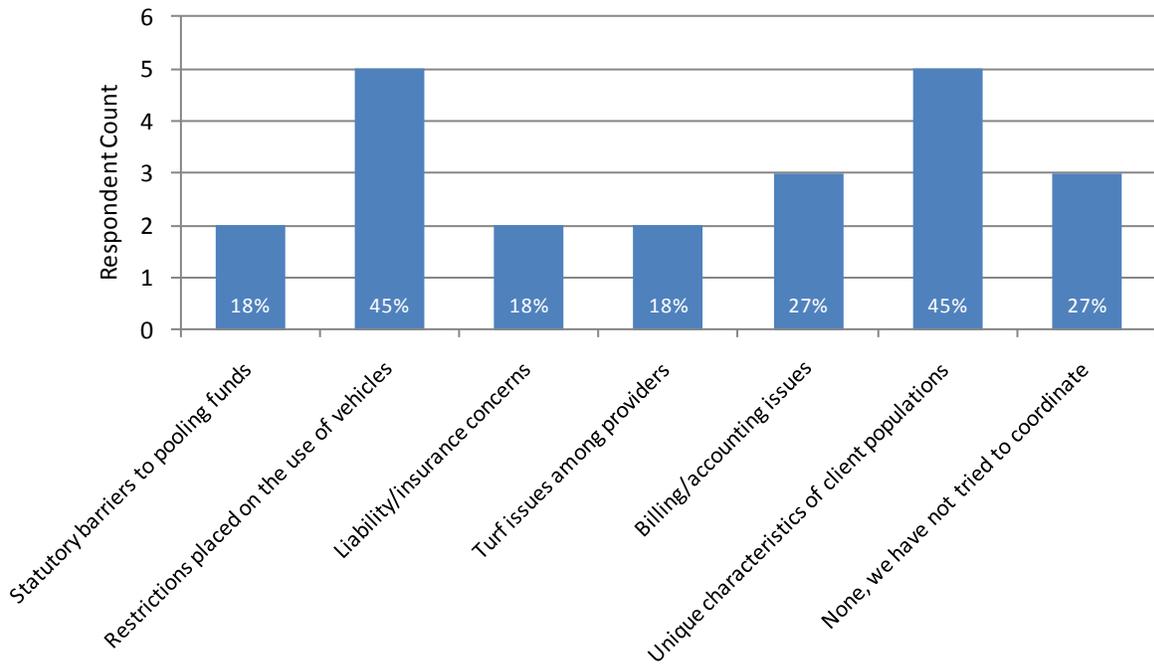
Q21. To what degree do you have the capacity to take on the following roles for other agencies (assuming your incremental costs are covered)?

	Centralized scheduling, dispatch and vehicle tracking	Marketing	Driver training	Maintenance	Grant writing	Fleet management	Housing a mobility manager
Plumas Rural Services	<u>Medium</u>	<u>Medium</u>	<u>High</u>	Low	<u>High</u>	Low	<u>High</u>
Plumas Unified School District	<u>High</u>	Low	<u>High</u>	<u>High</u>	<u>High</u>	<u>High</u>	Low
Senior Transportation (Plumas County Public Health Agency)	Low	Low	No Capacity	No Capacity	Low	Low	<u>Medium</u>
Environmental Alternatives FFA	No Capacity	Low	No Capacity	Low	Low	Low	<u>Medium</u>
Plumas Crisis Intervention and Resource Center	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity
Plumas County Veterans Service Office	No Capacity	No Capacity	Low	No Capacity	Low	No Capacity	No Capacity
Plumas County Social Services	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity
Plumas Transit	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity	No Capacity
Plumas District Hospital	No Capacity	Low	No Capacity	No Capacity	<u>Medium</u>	No Capacity	No Capacity

Note: Greenville Rancheria, We Care A Lot Foundation, and Alliance for Workforce Development, Inc. did not submit responses for this question.

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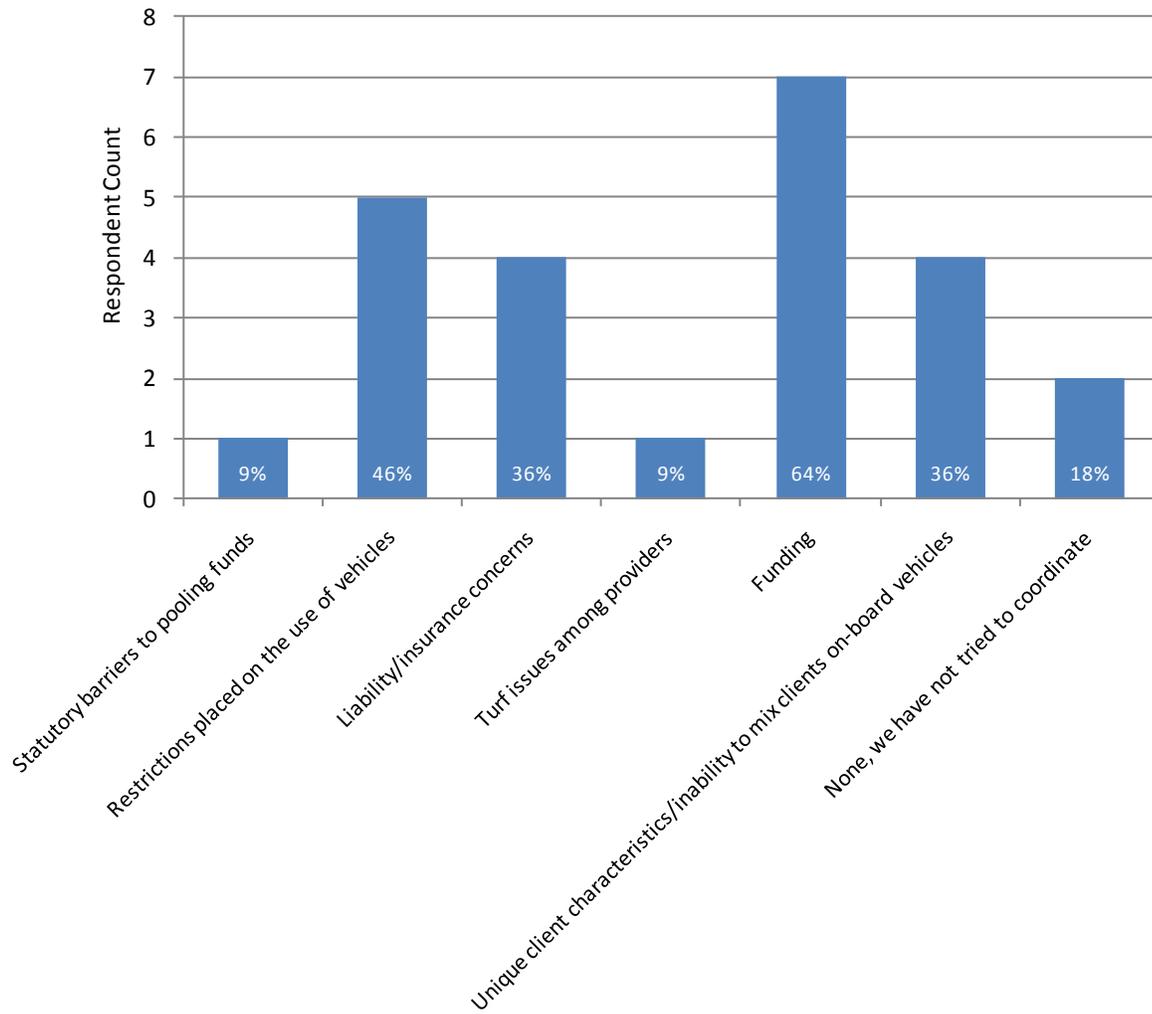
Q22. What issues, if any, have you encountered in your efforts to coordinate transportation services? (Check all that apply)



Note: Plumas Transit also noted contractual compliance as a barrier to coordination.

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Q23. In your opinion, what do you see as the major obstacle(s) to coordination in your service area? (Check all that apply)



APPENDIX C

TRANSPORTATION PROVIDER WORKSHOP RESULTS

Transportation Provider Workshop Results

The following appendix summarizes the opportunities and constraints related to the mobility management elements and phasing considerations needed for Mobility Management Center implementation.

Infrastructure

Opportunities/Strengths

- The SSTAC (Social Service Transportation Advisory Council) consists of many of the Plumas County transportation providers and can be formalized (with bylaws etc.) to act as a coordinating council.
- A number of theme-based regional organizations (addressing aging, mental health, transportation, poverty issues, etc.) currently exist and can be affiliated with mobility coordinating efforts.
- The Federal Highway Administration has developed some policies for considering I-80 into Reno as in-state operation for California agencies. Similar consideration can be sought for transit operations into Reno.

Constraints/Weaknesses

- The SSTAC does not have a current leader and one needs to be identified for a Plumas County mobility coordinating council.
- The term coordinating council may be confused with other councils and can carry a negative connotation; a new term should be used to brand this organization.
- The Plumas County mobility coordinating council should still function as the state-mandated SSTAC when appropriate.
- Native Americans may decide to not be fully engaged in mobility coordination efforts.
- Bi-state operations run into a number of constraints.

Phase 1

Opportunities/Strengths

- Plumas Rural Services has a social service (including transportation) resource guide and this can be built upon.
- To share information among social service and transportation providers, a “Train the Trainer” session can be used to inform case managers and other staff/volunteers about the continuum of services available in the county.
- Two commercial fueling lots exist in the County; further programs can offer negotiated (and tax exempt where appropriate) prices to providers at multiple fueling stations.
- Centralized driver training can reduce costs associated with training vehicle operators and can provide consistent/quality policies and procedures in the County (and funding may be available to support this program).

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- Common vehicle inspection policies and procedures can improve safety and reduce provider administration.
- Centralized vehicle maintenance can improve quality of service and reduce costs to some providers.
- Centralized data management (and reporting) tools/procedures can reduce provider administration.
- Coordinated grant writing can reduce provider administration, increase chance of success by providing a county-wide, coordinated request and increasing the ridership base for the applications.

Constraints/Weaknesses

- Use of County fueling or maintenance facilities by all providers may result in capacity constraints. Past budget studies among departments resulted in prohibitive findings.
- Use of County maintenance staff by all providers may negatively impact local businesses. Past budget studies among departments resulted in prohibitive findings.

Phase 2

Opportunities/Strengths

- Formal Information and Referral agreements between providers can protect all parties if any referred trips result in potential damages.
- Co-sponsoring of services (similar to the evening Quincy service sponsored by the Feather River College) can expand services.
- Trip mingling (also known as ridesharing) can utilize available capacity and combine customers from multiple agencies in one vehicle.
- Cost-allocation tool/procedures can track trip costs and support provider/funder reporting requirements.
- A trip mingling pilot project involving 2 to 4 Plumas County agencies can verify the viability of this strategy and refine the tools/techniques/agreements needed for boarder applications in the County.
- Centralized efforts to expand volunteer driver opportunities (building on the work by Community Connections) can increase service in the County.

Constraints/Weaknesses

- None Identified

Phase 3

Opportunities/Strengths

- A formal Mobility Management Center and further resource sharing and cost savings while assuring individual provider needs are met.

Constraints/Weaknesses

- Sustainable funding for a formal Mobility Management Center needs to be identified.

APPENDIX D

ADDITIONAL RESOURCES

The following resources provide additional information on the methods and approaches described in this study.

Technology

The Transit Cooperative Research Program prepared a guide to assist rural transportation providers in determining the appropriate size and functionality of technology systems. It is available here:

- http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_76.pdf

The Pennsylvania Transportation Resource and Information Network has developed a guide for acquiring demand responsive transit software and technology

- <http://www.penntain.net/pdf/SoftwareGuide.PDF>

The Transit Cooperative Research Program has also prepared a synthesis of current scheduling and dispatch practices among demand-responsive transit service providers

- http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_syn_57.pdf

United We Ride has prepared the following online resource outlining various technologies that support resource sharing and coordination. For more information visit the following website:

- <http://www.unitedweride.gov/F5609.RideBrochure12.txt>

Cost Sharing

The Transit Cooperative Research Program prepared a toolkit and guild for sharing the costs of human services transportation. It can be downloaded here:

- http://www.trb.org/Main/Blurbs/Sharing_the_Costs_of_Human_Services_Transportation_165015.aspx
- United We Ride has published the Federal Interagency Coordinating Council's Final Vehicle Sharing Policy on its website, here:
- http://www.unitedweride.gov/1_1165_ENG_HTML.htm

APPENDIX E

SAMPLE MOBILITY MANAGER JOB DESCRIPTIONS

Humboldt County, CA

Transit Authority of River City (Louisville, KY)

Pikes Peak Area Agency on Aging (Colorado Springs, CO)

Sample #1: Humboldt County, CA

Summary of Duties

In coordination with regional informal and formal transportation providers, this full-time position will be responsible for the development, coordination and promotion of transportation services in Humboldt County. As the Program Coordinator, this individual is responsible for collaborating in efforts to establish centralized transportation information, assist customers with planning cost-effective and time-effective trips through various transportation providers, participating in collaborations of community organizations that provide human services transportation in Humboldt County, improving the consideration of transportation in land use and other policy decisions; and for identifying and procuring resources to continue coordination efforts and establishing a Mobility Management Center. The incumbent will work under the general supervision of the XXXX and serve as facilitator for the Humboldt County Mobility Management Coalition.

The primary tasks of the Mobility Manager will be: to work with transportation planning agencies, community organizations, social services transit information and services providers; and formal public transit providers to establish a transportation services information assistance and call center that will provide all Humboldt County residents, including those who may have a choice of multiple modes of transportation, the opportunity to utilize existing informal and formal transportation services; and to assist existing informal and formal transportation service providers and planners to coordinate transportation resources. Once the call center has been successfully launched and implemented, the Mobility Manager will take on other tasks as outlined below.

Duties:

Primary Duty:

- Work with existing informal and formal transportation providers to establish a joint call and mobility management 'trip planner' center, which includes the following:
 1. Develop customer information that explains the range of services and empowers transit users to choose the most appropriate, cost-effective, and time-effective option that will meet the customer's needs;
 2. Coordinate with the existing effort to bring 211.org to Humboldt County (211 is a number service to 411, which assists customers in finding businesses; 211 is a telephone/website referral service that contains information about housing, social services, transportation, and so forth);
 3. Partners with other agencies to apply for grants; or directly applies for and administers grants;
 4. Investigate the feasibility of shared resource system that relates to vehicle maintenance, sharing of backup vehicles, and cost saving fueling options; and
 5. Strengthen the network of human services providers that provide both information about existing transportation options and directly provides transportation service in Humboldt County while maintaining and supporting the identity of each provider in order to provide increased mobility in the region.

PLUMAS COUNTY TRANSPORTATION COMMISSION

- Develop a coordination program for human services transportation, assist with the facilitation and promotion of coordinated efforts by:
 1. Researching needs and demands of users;
 2. Reviewing regulatory processes;
 3. Facilitating communication between agencies;
 4. Developing incentives to encourage agency participation as needed; and
 5. Attending meetings, assist with recommendations to improve services and/or coordination with HCAOG's SSTAC, SCC, CAC committees, which are forwarded to the HCAOG Board.
- Organize and facilitate an annual County-wide Mobility Management meeting for those interested in transportation issues to update the vision for transportation coordination, assess progress towards goals, and identify success, challenges, and opportunities.

Secondary Duties

- Works to improve the incorporation of transportation needs in to land use policy decisions across the County.
- Assists existing transportation providers with the development and implementation of transportation marketing and educational strategies as requested.
- Assist with assessing priorities and developing recommendations to address unmet or anticipated transportation need, including recommendations for new routes, route deviations, service hours, and cross-system scheduling, including those residents that need to travel to areas outside Humboldt County. Coordinate with and provide information to adjacent counties' transportation providers. Coordinate these efforts with the yearly Unmet Transit Needs Hearings processes; and
- Assists formal and informal transportation providers, community groups, and others with the creation of or implementation of alternative transportation services such as mileage reimbursements: volunteer drivers/vehicle sharing, vouchers for gas or car repairs, in order to meet diverse human service transportation needs at the lowest cost.

Preferred Qualifications

1. Master's Degree in public administration, transportation planning, or a related field, or
2. Bachelor's Degree in public administration, transportation planning, or a related field, plus a minimum of two years of progressively responsible experience, or
3. Associate's Degree in transportation planning, urban and regional planning, or a related field, plus a minimum of six years of progressively responsible experience, or
4. High school diploma plus a minimum of eight years of progressively responsible experience in managing or administering the provision of human services transportation with responsibility for the required duties listed above.

Required:

- Experience successfully applying for grants and completing all reporting requirements;
- Knowledge of and ability to identify community needs and resources as they relate to transportation, human services programs and employment. Ability to plan and direct the work of others; excellent verbal and written communication skills,
- A high degree of computer literacy, including competency in standard spreadsheet, database and word processing software, and geographic information system software. Familiarity with website design and protocols and be able to take advantage of current technology,
- A thorough knowledge of the principles and practices of rural transportation planning, technical analysis methods, and
- Excellent written and oral communication skills.
- Ability to analyze complex issues and present results in concise reports and presentations to the Mobility Management Coalition, local transportation providers & staff, HCAOG staff, and others;
- Interact effectively with members of the public, elected officials, Federal, State, and local agency representatives, HCAOG Committees, and community organizations.
- Understanding of pertinent Federal and State regulations, and a working familiarity with the most recent Federal transportation legislation and Clean Air Act transportation planning requirements
- Facilitates the Mobility Management Coalition, including key level provider organizational and community groups.
- This position requires an innovative and highly motivated person who is able to work independently. The position will be very interactive with the local and regional health and human service community and public sector.

Special Preferred Requirements

Possession of a clean, valid California driver's license at the time of appointment, and maintenance of same throughout, reliable personal transportation. Experience with multiple modes of transportation, which could include bicycling, walking, public transit, etc.

Sample #2: Transit Authority of River City (Louisville, KY)

Job Opening for Mobility Manager

The Transit Authority of River City is looking for a full time Mobility Manager within its Marketing and Planning Department. This person will implement tasks as determined by TARC and the Coordinated Transportation Steering Committee, which includes members of local non-profit and private transportation providers.

The objective of this organization is to coordinate transportation services provided throughout the metropolitan area in order to improve overall mobility, with near-term improvements for elderly persons or persons with disabilities. This position provides the opportunity to interact with experienced professionals in a variety of fields. Prospective candidates with a background in non-profit organizations, transportation planning, communications or public relations should apply.

Duties include data collection and analysis; general clerical tasks; research and report generation; grant writing; outreach to businesses, non-profits and government agencies, and organizing and staffing community events, serving as project manager for grants obtained, and researching and testing potential ITS applications.

Applicant should be extremely detail oriented and enjoy a fast paced working environment and must be able to work independently. Daily travel is expected.

Essential Computer Skills: Microsoft Office – Word, Excel, and Access (or other similar desktop programs)

Hours: 40 hours/week

Salary: negotiable

Where to apply: Send resume and salary history to Human Resources, Attention: Mobility Manager, 1000 W. Broadway; Louisville, KY 40203.

TRANSIT AUTHORITY OF RIVER CITY

POSITION DESCRIPTION

JOB TITLE: Mobility Manager

FLSA STATUS: Exempt **EEO CODE:** 02

JOB GRADE: **JOB CODE:**

REPORTS TO: Director of Marketing and Planning

GENERAL SUMMARY:

Under general supervision of Coordinated Transportation Steering Committee based on the organization's long term goals and objectives

ESSENTIAL DUTIES AND TASKS:

1. Develop coordination program for transportation providers
 - a. Develop incentive program
 - b. Create communication plan

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- c. Review regulatory processes
 - d. Research needs and demands of users
2. Develop transportation program
 - a. Explore use of local cab company and school system for service provision
 - b. Establish system for shared use vehicles
3. Develop information program
 - a. Create map of assets and needs
 - b. Produce outreach materials for users and providers
 - c. Develop grants and other funding sources
4. Explore and implement opportunities to generate additional resources
 - a. Research and apply for eligible grants
 - b. Pursue opportunities for corporate and government sponsorships
 - c. Seek government grants and other funds.
5. Perform other duties as assigned

WORKING CONDITIONS:

This work is generally performed in a quiet office environment. Some work may take place in the field, depending on the assignment. The incumbent will be exposed to diesel fumes and/or airborne particles.

EFFORT:

Long periods of time working at a computer terminal. Use of keyboard may be stressful to hands or wrists. Must be able to see, hear and speak. Frequent handling and fingering, reading, working with information, standing, walking. Occasional lifting up to 25 pounds, reaching, climbing, stooping. Requires driving almost daily. Must be available for evening and weekend work.

MACHINES, TOOLS, EQUIPMENT:

Computer, printer, photocopy machine, fax machine, calculator, shredder, telephone, TARC van or car

MINIMUM QUALIFICATIONS:

Post secondary education in business, communications or related field preferred. A combination of education, training and experience that results in demonstrated competency performing the work may be substituted.

Excellent verbal and written communication skills. Ability to coordinate multiple projects simultaneously. Ability to create effective communication devices.

Must have excellent computer skills.

Must maintain a valid driver's license.

Successful performance on all pre-employment tests, including any required drug test.

The incumbent must be able to maintain the confidentiality of any information s/he encounters.

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Reasonable accommodations may be made to those who are able to perform the essential duties of the job.

SPECIALIZED SKILLS AND KNOWLEDGE:

Experience with the following types of software and/or applications is preferred: word processing, spreadsheets, scheduling, project management, presentation, graphics, layout and design.

Sample #3: Pikes Peak Area Agency on Aging (Colorado Springs, CO)

Job Title: Mobility Manager

Job Type: Manager

Date Posted: 12/18/2007

Organization: Pikes Peak Area Agency on Aging

URL: www.ppacg.org

Job Description:

Mobility Manager

Pikes Peak Area Agency on Aging

Monthly Salary: \$3,730 - \$5,408

OPEN UNTIL FILLED

This is a temporary one-year exempt professional position with the Pikes Peak Area Council of Governments, and the Pikes Peak Area Agency on Aging. The position serves as the Mobility Manager for the PPAAA. As the Program Coordinator, this individual is responsible for developing a joint call and scheduling center under the guidance of the PPAAA Director, for participating in collaborations of community organizations that provide human services transportation in El Paso and Teller Counties and for identifying and procuring resources to implement the joint call and scheduling center.

Duties include, but are not limited to:

- Develop a coordination program for human services transportation by collaborating with community organizations that provide such services in El Paso and Teller Counties to:
 - Research needs and demands of users
 - Review regulatory processes
 - Facilitate communication between agencies
 - Develop incentives to encourage agency participation as needed
- Interface with PPACG's Coordination Committee on Specialized Transportation,
- Investigate the concept of a specialized transportation brokerage and determine what structure would be effective in the Pikes Peak region.
- Strengthen the network of human services transportation providers in El Paso and Teller Counties while maintaining and supporting the identity of each provider in order to provide increased mobility in the region.
 - Establish a joint call and scheduling center
 - Develop common and accurate reporting systems as needed
 - Develop service goals for the transportation brokerage
 - Identify and use fully allocated service costs in evaluating projects and service options
 - Establish a system for the shared use of vehicles

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- Investigate a system of shared resources including those related to vehicle maintenance, sharing of backup vehicles, and cost saving fueling options
- Establish provision of alternative services such as mileage reimbursements: volunteer drivers/vehicle sharing, mobility training, vouchers for gas or car repairs, in order to meet diverse human service transportation needs at the lowest cost.
- Develop systems to help providers improve the overall condition of their vehicle fleets so that they are safe, cost effective to maintain and meet passenger needs. Develop a system to provide adequate backup vehicles to provide reliable service.
- Develop and implement common standards of driver training to provide safe drivers who can be cross-trained for different services and clientele.
- Develop a simple and uniform system of eligibility for all services in the network.
- Develop customer information that explains the range of services and encourages rider responsibility for choosing the most appropriate and cost-effective option that will meet the customer's needs.
- Implement quality control standards that include service reliability and customer satisfaction.

Supervisor

The Director of the Pikes Peak Area Agency on Aging

Required Education and Experience

1. Master's Degree in public administration, transportation planning, or a related field, or
2. Bachelor's Degree in public administration, transportation planning, or a related field, plus a minimum of two years of progressively responsible experience, or
3. Associate's Degree in transportation planning, urban and regional planning, or a related field, plus a minimum of six years of progressively responsible experience, or
4. High school diploma plus a minimum of eight years of progressively responsible experience in managing or administering the provision of human services transportation with responsibility for the required duties listed above.

Also required:

- A high degree of computer literacy, including competency in standard spreadsheet, database and word processing software, and geographic information system software.
- A thorough knowledge of the principles and practices of urban transportation planning, technical analysis methods, and excellent written and oral communication skills.
- Ability to analyze complex issues and present results in concise reports and presentations to PPACG staff and others; interact effectively with members of the public, elected officials, Federal, State, and local agency representatives, PPACG Committees, and community organizations.
- Understanding of pertinent Federal and State regulations, and a working familiarity with the most recent Federal transportation legislation and Clean Air Act transportation planning requirements.

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Please download and complete an application at www.ppacg.org, attach your resume, if desired, and email to: Margaret Shelton at: mshelton@ppacg.org. You may also fax to (719) 471-1226, or mail to 15 South 7th Street, Colorado Springs, Co 80905-1501.

PPACG is an equal opportunity employer.

APPENDIX F

SAMPLE AGREEMENTS AND BYLAWS

Inter-Agency Coordination Agreement

Model Joint Powers Agreement to Coordinate Transportation Service

Sample Mobility Council for Community Transportation Memorandum of Understanding

Sample Mobility Council Bylaws

Inter-Agency Coordination Agreement

I. This agreement as set forth herein between [Human Service Agency], as a lead agency; and [Human Service Agency], hereinafter referred to as Participating Agency, represents a mutual understanding and commitment on behalf of contractual parties to cooperatively develop a human services transportation system within _____ County that makes the most of efficient use of all vehicles while reducing to the extent possible, duplicative and overlapping service. The parties further agree that no current transportation system will be changed in any way unless and until the changes result in improved service and reduced costs. This agreement further represents of both parties to:

- A. Cooperatively undertake the task of correcting existing deficiencies within the existing human service transportation system;
- B. Provide for a greater degree of coordination and efficient utilization of human service vehicles;
- C. Achieve a more effective method of providing transportation to existing and potential client populations with the total amount of financial, physical and human resources available;
- D. Cooperate with one another, as well as other participating agencies in the development of more cost effective means and methods of operating and maintaining human service vehicles;
- E. Work jointly with other participating agencies to develop and provide for centralized support and management services, including, but not necessarily limited to, vehicle maintenance, coordinated purchasing systems, coordinated billing and accounting procedures, and similar management procedures;
- F. Develop organizational and instructional frameworks with the participating agencies to provide overall policy coordination and development as well as to ensure efficient day-to-day operation of a coordinated human service transportation network.

II. [Lead Agency] shall:

- A. Be responsible for administration of the program under the overall policy provision of the _____ County Transit Administration Board of Directors (_____) and the _____ County Manager or his designee.
- B. Be responsible for the data collection monitoring of services, reporting to the California Department of Transportation (Caltrans), the County and the _____ Board, and shall be accountable for proper administration and management of the program.
- C. Cooperate with the County and the _____ Board in setting of overall policy in achieving the goals and objectives of the program.
- D. Work with the County and the _____ Board to achieve coordination among all participating agencies.
- E. Provide the County and the _____ County Transit Administration, Inc. monthly reports with all costs and services provided.

III. Participating Agency shall:

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- A. Work with [Lead Agency], its staff, the _____ Board, and other participating agencies in achieving the goals and objectives of human service transportation coordination.
 - B. Continue and/or provide a representative to the _____ Board with such a member holding voting privileges.
 - C. Purchase passenger service (seating capacity or vehicle time) from the lead agency or other participating provider agencies to the extent that such service is affordable and meets the needs of its clients.
 - D. Sell passenger service (seating capacity or vehicle time) to participating agencies to the extent that it does not substantially reduce or modify service to the clients of the agency.
- IV. This agreement shall take effect [date]. The duration of the contract shall be for twelve consecutive months ending [date].
- V. Executed this _____ day of _____, 201__, by

Participating Agency
Signature

Lead Agency
Signature

Typed Name & Title

Typed Name & Title

Date

Date

**OUTLINE OF
MEMORANDUM OF UNDERSTANDING
TO COORDINATE TRANSPORTATION SERVICE
JOINT EXERCISE OF POWERS CONSORTIUM AGREEMENT FOR
(INSERT NAME OF PROGRAM)**

THIS AGREEMENT is entered into this *INSERT DATE* by and between the *LIST NAME OF AGENCY* and *LIST NAME OF AGENCY* (hereinafter referred to as “member agencies”).

WITNESSETH

WHEREAS, the member agencies provide public transit services in the Counties of _____; and

WHEREAS

LIST ADDITIONAL CIRCUMSTANCES LEADING TO THE DECISION TO ENTER INTO THIS AGREEMENT

NOW, THEREFORE, IN CONSIDERATION OF THE FAITHFUL PERFORMANCE OF THE TERMS, CONDITIONS AND PROMISES IN THIS AGREEMENT, THE MEMBER AGENCIES AGREE AS FOLLOWS:

Article 1. Name and Purpose

- a. The name of this Consortium is _____.
- b. The purpose of this Agreement is to *LIST PURPOSES*.

Article 2. The Lead Agency

The responsibility to act as the Lead Agency under this Agreement shall rotate between the member agencies beginning with each fiscal year, other than the first fiscal year this Agreement is in effect. This rotation of responsibility shall remain in effect until this Agreement is terminated.

NAME OF AGENCY shall serve as the Lead Agency from the effective date of this Agreement until the end of the *INSERT YEAR* Fiscal Year.

Article 3. Scope of Services.

The Lead Agency shall provide the following services:

THE FOLLOWING ARE SOME EXAMPLES OF SCOPE THAT MIGHT BE INCLUDED HERE.

- a. Solicit the services of a Project Manager
- b. Solicit and oversee the services of legal counsel

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- c. Oversee the activities of the Project Manager;
- d. Prepare a budget for the succeeding fiscal year;
- e. Apply for and oversee the administration of all forms of applicable grants or revenues
- f. Provide staff support necessary to carry out the Plan
- g. Work with the Service Review Committee and the Project Manager to bring issues to the member agencies which require their determination.
- h. Account for all funds and report all receipts and disbursements
- i. Conduct and file an annual audit
- j. Nothing in this agreement shall prohibit the Lead Agency from contracting for the provision of any or all of the services
- k. Collect and report service data used to determine costs sharing by the member agencies

Article 4. Project Manager.

The Project Manager shall be responsible for administering the Plan on behalf of the member agencies, under the direction and control of the Service Review Committee. The duties of the Project Manager, which may be changed from time to time, include, but are not limited to, the following:

THE FOLLOWING ARE SOME EXAMPLES OF DUTIES THAT MIGHT BE INCLUDED HERE.

- a. Prepare an annual budget and financial report
- b. Investigate the availability of and apply for grants, funds and other sources of revenue to fund the Plan's activities;
- c. Account for all revenues and expenditures;
- d. Serve as a liaison between the member agencies and customers, and other local and regional agencies.
- e. Notice and record all meetings and activities;
- f. Provide customer services;
- g. Coordinate the preparation of the annual plan update.

Article 5. Indemnification.

INCLUDE STANDARD INDEMNIFICATION LANGUAGE

Article 6. Compensation.

The expenses to be borne by the agency members for carrying out the Plan shall be determined as follows:

- a. The Lead Agency shall be credited for in-kind services provided in the performance of the services identified in Article 1.
- b. *DESCRIBE COST-SHARING AGREEMENTS*

Article 7. Service Review Committee.

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- a. Purpose. The Service Review Committee shall provide direction to the Lead Agency and the Project Manager.
- b. Membership.
- c. Required Votes; Approvals.
- d. Quorum.
- e. Minutes.
- f. Budget.

Article 8. Termination/Withdrawal.

- a. Individual Member Withdrawal
- b. Complete Dissolution.

Article 9. Disposition of Money and Property.

Article 10. Miscellaneous.

- a. Term of Agreement.
- b. Amendment.
- c. Additional Members.
- d. Dispute Resolution.
- e. Successors.
- f. Severability.

IN WITNESS WHEREOF, the parties hereto have executed this AGREEMENT by authorized officials on the dates indicated below:

NAME OF AGENCY

By: _____ General Manager

DATE:

NAME OF AGENCY

By: _____, General Manager

DATE:

_____ County Mobility Council for Community Transportation

Memorandum of Understanding

MISSION: To foster, organize and guide local and regional coordination efforts that directly or indirectly improve the mobility of seniors, persons with disabilities and person with low income for the benefit of the community.

WHEREAS the term “community transportation” is focused on any public transportation service or human service agency transportation service or program, whether it be provided by a public or private entity, that *focuses* on transportation for seniors, persons with disabilities, and persons with low income;

WHEREAS there are several different community transportation services currently within _____ County;

WHEREAS there are significant unmet needs for individuals requiring community transportation services within _____ County;

WHEREAS these unmet needs are anticipated to grow significantly due to demographic trends in _____ County;

WHEREAS the coordination of community transportation information and services has been shown to result in increased service through improved cost efficiency, elimination of duplication, and access to additional funding; and

WHEREAS there is a need – and an opportunity – to create a balanced network of diverse community transportation services and mobility options by coordinating community transportation in _____ County,

BE IT KNOWN THAT

_____ intends to participate in the establishment and functioning of the _____ County Coordination Council for Community Transportation.

The _____ Association of Governments, intends to initially serve as the administrative home of the _____ County Mobility Council.

This Memorandum of Understanding documents this intent and the organizations’ commitment to the primary mission of the Council.

To fulfill its mission, the primary roles of the Council are to:

- Help develop, implement, and provide guidance to the coordination of community transportation services within _____ County so that (1) seniors, persons with disabilities and persons with low income can better access local and regional transportation services and information; and (2) operators, funders and purchasers of community transportation services can more effectively utilize and leverage funding in order to expand services to address the growing needs of the community;

PLUMAS COUNTY TRANSPORTATION COMMISSION

- Help recruit, select, guide, assist, and monitor the efforts of a Mobility Manager who will have the day-to-day responsibility for encouraging, planning, evaluating, and in some cases, managing, the coordination of community transportation services and information in the region;
- Work together with other Regional Coordinating Councils that form in other regions of the state to help promote coordination and develop solutions to inter-regional community transportation needs; and
- Provide feedback to governmental agencies and other organizations that fund/sponsor community transportation relative to policies and practices that successfully foster and that adversely affect the coordination of community transportation services and information.

In signifying this intention and commitment, _____
pledges to:

- Designate one representative (and/or up to two alternate representatives) to the Council, and ensure that the representative attends regularly scheduled meetings of the Council and is active in the functioning of the Council and Committees.

Either party may cancel this Memorandum of Understanding with 14 days written notice.

IN WITNESS WHEREOF, indicates its support and intent:

Name: _____

Title: _____

Organization: _____

Signature: _____

Date: _____

Representative (if different from above): _____

Alternate 1 (Name): _____

Alternate 2 (Name): _____

ACCEPTANCE BY:

Name: _____

Title: _____

Organization: _____

Signature: _____

Date: _____

_____ County Mobility Council Bylaws

MISSION: To foster, organize and guide local and regional coordination efforts that directly or indirectly improve the mobility of seniors, persons with disabilities and person with low income for the benefit of the community.

Article I: Name

The name of the Council shall be the _____ County Mobility Council (hereinafter called the Council). These bylaws shall provide the procedures for conduct of business of the Council.

Article II: Purpose

Established by its founding members, the Council is organized to:

- Help develop, implement, and provide guidance to the coordination of community transportation services and information within the region so that (1) seniors, persons with disabilities, and persons with low income can better access local and regional transportation services; and (2) operators, funders and purchasers of community transportation services can more effectively utilize and leverage funding in order to expand services to address unmet needs;
- Help guide, assist, and monitor the efforts of a County Mobility Manager who will have the day-to-day responsibility for encouraging, planning, evaluating, and in some cases, implementing and managing, coordinated efforts, services and information in the region;
- Work together with other Regional Coordinating Councils from other regions of the state to help promote coordination and develop solutions to inter-regional community transportation needs; and
- Provide feedback to governmental agencies and other organizations that fund/sponsor community transportation relative to policies and practices that successfully foster and that adversely affect the coordination of community transportation services and information.

Article III: Membership of the Council

III.1 Membership Eligibility Criteria

The Council shall be composed of organizational and citizen members as follows:

- **Organizational members** – Any of the following organizations are automatically a member of the Council upon formal adoption of the Council's Memorandum of Understanding by that governmental unit or organization, and formal acceptance by the Council:
 - Any public, private non-profit, or for-profit organization based within or near the region and that currently funds, arranges or provides community transportation services to, from or within the region;

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- Any local or regional public transportation provider or state/regional/county/municipal agency involved in the planning or provision of public/passenger transportation in the region;
- Organizations representing groups of consumers and constituents that would be positively affected by such mobility and access improvements in the region.

Each organizational member shall designate one representative and up to two alternate representatives to the Council.

- **Citizen members** – Citizen members must be residents of the region and take an active interest in improving mobility for seniors, persons with disabilities, and/or persons with low income within the region. There shall be at least 1 citizen member on the Council. The maximum number of citizen members on the Council shall equate to no more than 10% of the total organizational members. The term of each citizen member shall be two years. Citizen members may serve multiple terms, but must submit an application at the end of each term. Applications to be a citizen member must be submitted to the Secretary no later than the Council's regular _____ meeting. Appointed by the Chair, the Membership Committee will review the applications and recommend the appropriate number of citizen members, to be voted upon by the council at the Council's regular _____ meeting. Citizen members have voting rights but do not have the right to designate an alternate.

III.2 Rights and Responsibilities of Membership

Each member is afforded one full vote on any decision put to a vote. Each organizational member's vote can be cast by his/her representative or alternate representative. Citizen members must be present at meetings to vote; proxy votes for citizen members will not be permitted.

To be in "good standing," a member (1) must attend at least 75% of the regular monthly meetings, and miss no more than two consecutive regular monthly meetings in a calendar year; and (2) must participate in some facet of the Council's work program. The Chair may determine if a missed meeting is excused; an excused miss shall not count as non-attendance.

III.3 Annual Membership Dues

There may be annual membership dues to cover the administrative costs and other business of the Council, the amount to be determined annually. Membership dues for any citizen member may be waived per the vote of the Council.

Article IV: Officers of the Council

IV.1 Officers and Terms of Office

The Officers of the Council shall be as follows:

- Chair
- Vice Chair
- Treasurer
- Secretary

The term of each officer shall be one year. Officers may serve multiple terms.

IV.2 Election of Officers and Operating Year

The Council's operating year shall begin at the regular _____ meeting.

Officers will be elected by majority vote on an annual basis at the Council's regular _____ meeting.

Nominations for officers must be given to the Secretary no later than at the Council's last regular meeting of the calendar year.

IV.3 Responsibilities of the Officers

The Chair, or in the event of his/her absence, the Vice Chair, shall preside at all meetings of the Council; but neither shall be deprived of his/her right to vote.

The Chair or Vice Chair shall have such other powers and perform such other duties as may from time to time be voted by the Council, including the establishment of committees and appointment of committee members as may be necessary or convenient for carrying out the business of the Council.

The Treasurer shall be responsible for collection of annual dues (if any) and disbursement of funds for the conduct of Council business.

The Secretary shall be responsible for disseminating information to Council members, writing Council correspondence, keeping meeting attendance records, and taking minutes of meetings.

Collectively, the Chair, Vice Chair, and Treasurer shall comprise the Executive Committee. The Chair, Vice Chair, and Treasurer must be members in good standing. It is not required that the Secretary be a member of the Council.

IV.4 Vacancies

If an officer vacates an office for any reason (non-attendance, resignation), the Chair (or Vice Chair if the vacancy is the Chair) shall declare the vacancy at the next regularly scheduled meeting. The Chair (or Vice Chair if the vacancy is the Chair) can wait until the next nomination/election period or may accept nominations from the floor at the meeting at which the vacancy has been declared. If nominations from the floor are accepted, voting will take place at the next scheduled meeting.

IV.5 Removal of Officers

Members, by 2/3 vote of members present, may remove an officer. An officer under consideration for removal should have the opportunity to be advised and be able to speak to the concerns of the membership. Such matters and discussions should take place in an executive session. The officer under consideration for removal may be given a 30-day period to correct any deficiencies before the vote is taken.

Article V: Meetings of the Council

V.1 Regular Meetings

The Council shall meet monthly on _____ from _____ to _____ or on another date and/or at another time at the call of the Chair. The Council may vote at a prior meeting not to hold the next regular monthly meeting. The Chair may also cancel a regular monthly meeting.

At the regular meetings, the Council may take such actions, pass such resolutions, or conduct such other business as are on the agenda or may otherwise be properly brought before it.

V.2 Special Meetings

The Chair, or in the event of his/her absence, the Vice Chair may call a special meeting of the Council as required and shall call a special meeting at the request of one-third (1/3) of the members. Business at special meetings shall be limited to the subjects stated in the call for them.

V.3 Information Meetings

The Chair may call an informational meeting as may be required for the presentation and dissemination of reports, analyses, or other data, and for the informal discussion thereof by the Council. No formal action by the Council shall be taken at such meetings. Resolutions may be introduced and discussed at such meetings, but formal debate and action on such resolutions may take place only at future regular or special meetings.

V.4 Meeting Notice and Agenda; Open Meetings

Not less than seven days advance notice in writing of regular or informational meetings shall be given to all members. Not less than three business days advance notice in writing of special meetings shall be given to all members. Such notices shall contain the time, place, proposed agenda, proposed resolutions on substantive matters, and the substance of any matter proposed to be voted on.

All meetings of the Council shall be subject to the open meetings act.

All meetings of the Executive Committee shall be posted three business days in advance, and shall be open to all Council members in good standing.

V.5 Quorum

Fifty (50%) of the membership constitutes a quorum.

V.6 Structure and Conduct of Meetings

Parliamentary discretion for the conduct of meetings shall be vested with the Chair. Council procedures shall provide an opportunity for all members to be heard on any given issue and for the efficient conduct of business.

V.7 Public Participation at Meetings

Any person is welcome to attend all regular and special meetings of the Council, excluding any required executive sessions, and be permitted to address the Council under direction from the Chair.

There shall be two separate opportunities for public comment in these meetings – the first shall be specific to agenda items, the second specific to other business. The Chair shall dictate when these opportunities shall occur in the agenda. Each public comment shall be limited to 3 minutes. This limit may be extended at the discretion of the Chair.

Prior to these meetings, any person wishing to comment at the meeting must first provide a written synopsis of the comment, along with his/her name, address, and contact information to the Secretary, who in turn will submit these written synopses to the Chair.

Article VI: Voting

No vote on a substantive matter shall be taken unless the issue to be voted on has been listed in the proposed agenda, and timely notice (see Article V.4) has been given to all members. Election of Officers and Citizen Members are considered to be substantive issues. Dues payments or financial commitments of Council members are also considered substantive issues. A quorum must exist before any formal vote is taken (see Article V.5).

Each member is afforded one vote on any decision put to a vote and must be present to vote. In the absence of a voting organizational member representative, a designated alternative may cast the vote if present at the meeting. Otherwise, no proxy voting is permitted.

All decisions put to a vote, with the following exceptions, require a majority vote of all members present to pass. The exceptions which require a 2/3 vote of all members present to pass include changes or amendments to these by-laws (see Article VIII) and officer removals (see Article IV.4).

Article VII: Committees of the Council

On an annual basis, Council shall establish or continue standing committees as may be necessary or convenient for carrying out the business of the Council. Standing committees will be chaired by members of the Council but can include non-Council members. Standing committees may include:

- Advocacy Committee
- Consumer Liaison Committee
- Executive Committee
- Finance Committee
- Land Use/Transportation Planning Committee
- Marketing/Public Information Committee
- Membership Committee
- Projects Committee
- Regulatory/Policy Committee

Local Coordinating Councils that form within the region will also be represented as a committee of the council.

Additional standing committees can be established if deemed necessary or convenient to conduct the business of the Council. These committees can be established upon the affirmative vote of the majority of the Council members present at a regular or special meeting.

The Chair, or in his/her absence, the Vice Chair, shall establish ad-hoc committees and appoint committee members as may be necessary or convenient for carrying out the business of the Council. Non-members, because of their special expertise or association with particular issues, and at the discretion of the Chair, may be appointed to ad-hoc committees.

Article VIII: Amendments

These by-laws may be amended by the affirmative vote of 2/3 vote of the Council present at a regular meeting thereof, if the notice of such meeting has contained a copy of the proposed amendment. Amendments are considered a substantive issue.

Article IX: Effective Date

These by-laws will become effective upon adoption by 2/3 vote of the Council present.

APPENDIX G

COST ALLOCATION OVERVIEW

Cost Allocation in a Nut-Shell

Cost allocation is the process of identifying the full cost of providing a service and allocating those costs to the consumers of that service. The following example demonstrates the use of cost allocation to enable an organization to overcome a perceived funding barrier by identifying the full costs of their service as part of setting their rates for shared services.

Introduction

Agency A is an Independent Living Center that does not own or operate a passenger vehicle. However, its customers have an occasional need for recreational trips.

Agency B is a senior center. Agency B uses a portion of their funds received from Title 3(b) of the Older Americans Act to provide transportation service to seniors. The senior center employs a part time driver and uses its vehicle three days a week. Title 3(b) specifically states that program funds can only be used for seniors and their companions.

Agency A has approached Agency B to ask if Agency B could provide additional service for members of the Independent Living Center. Specifically, Agency A has requested service that will amount to approximately 2,500 annual miles and 180 annual vehicle hours, requiring one dedicated vehicle for half a day each week.

- **Question:** Is this possible? If it is possible, how much should Agency B charge Agency A for the service?
- **Answer:** Yes, it is possible. But, Agency B must follow appropriate cost allocation principles in determining the cost of service.
- **Reasoning:** The reasoning behind this answer can be found in an excerpt from the Federal Interagency Coordinating Council on Access and Mobility Vehicle Resource Sharing Final Policy Statement:

“A basic rule of appropriations law is that program funds must only be used for the purposes intended. Therefore, if an allowable use of a program’s funds includes the provision of transportation services, then that Federal program may share transportation costs with other Federal programs and/or community organizations that also allow funds to be used for transportation services, as long as the programs follow appropriate cost allocation principles.”

Developing a Cost Allocation Plan

The first step in developing a cost allocation plan is to calculate the full cost of service. This is accomplished by identifying all costs associated with providing service. Some costs are obvious, such as driver’s salaries and fuel, but other costs are less obvious like administrative overhead, maintenance, rent and utilities. All of the costs that are incurred by an organization in association with providing transportation over the course of a year must be added together to calculate the full cost of service. Assume for this example that the full cost of service incurred by Agency B is \$50,000, as outlined in Figure G-1, below.

⁸ Federal Interagency Coordinating Council on Access and Mobility. (2006, October 1). *Vehicle Resource Sharing: Final Policy Statement*. Retrieved May 20, 2011, from [unitedweride.gov: http://www.unitedweride.gov/1_1165_ENG_HTML.htm](http://www.unitedweride.gov/1_1165_ENG_HTML.htm)

Figure G-1 Total Annual Transportation Program Expenditures for Agency B

Operating Cost	
Drivers' Salaries & Fringe	\$ 24,500
Fuel & Oil	3,500
Commercial Vehicle Insurance	2,000
Total Operating Cost	\$ 30,000
Maintenance Cost	
Mechanics' Salaries	\$ 5,450
Materials & Supplies	2,500
Shop Rental	5,000
Equipment Rental	200
Contracted Service	1,200
Total Maintenance Cost	\$ 14,350
Administrative Cost	
Directors Salary & Fringe	\$ 2,500
Other Admin Salary & Fringe	1,500
Office Rent	500
Supplies & Equipment	150
Phones/Utilities	200
General Liability Insurance	500
Worker's Compensation Insurance	300
Total Administrative Cost	\$ 5,650
Total Transit Budget	\$ 50,000

Once the full costs have been identified, these costs are broken down into fixed and variable cost categories, which are then allocated based on units of service provided. This allows Agency B to assign costs based on cost drivers.

Figure G-2 shows how Agency B assigns variable and fixed costs. For example, fuel and oil consumption varies based on number of miles driven. So the cost-driver for fuel and oil is miles. Bus drivers' salaries vary based on number of hours worked, so the cost driver for bus driver salaries is miles. Therefore, these costs are to be allocated based on miles and hours, respectively. Other costs, however, are fixed and therefore do not vary based on hours or miles.

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Fixed costs must be allocated to some other measure of service output. In this simplified example, fixed costs are allocated based on the number of vehicles in the fleet⁹.

Table 3 shows the amount of service produced by Agency B during the year in which the \$50,000 costs were incurred. The left three columns of Figure G-3 show the calculated service rates. Cost per vehicle represents the total fixed costs divided by fleet size. Cost per hour represents the total hourly variable cost divided by total hours. Cost per mile reflects the total miles based costs divided by number of miles driven.

Figure G-2 Allocated Expenditures for Agency B

	Fixed Cost		Variable Cost	
			By Hours	By Miles
Operating Cost				
Drivers' Salaries & Fringe	\$ 24,500	\$ -	\$ 24,500	\$ -
Fuel & Oil	3,500	-	-	3,500
Commercial Vehicle Insurance	2,000	2,000	-	-
Total Operating Cost	\$ 30,000	\$ 2,000	\$ 24,500	\$ 3,500
Maintenance Cost				
Mechanics' Salaries	\$ 5,450	\$ 5,450	\$ -	\$ -
Materials & Supplies	2,500	-	-	2,500
Shop Rental	5,000	5,000	-	-
Equipment Rental	200	200	-	-
Contracted Service	1,200	-	-	1,200
Total Maintenance Cost	\$ 14,350	\$ 10,650	\$ -	\$ 3,700
Administrative Cost				
Directors Salary & Fringe	\$ 2,500	\$ 2,500	\$ -	\$ -
Other Admin Salary & Fringe	1,500	1,500	-	-
Office Rent	500	500	-	-
Supplies & Equipment	150	150	-	-
Phones/Utilities	200	200	-	-
General Liability Insurance	500	500	-	-
Worker's Compensation Insurance	300	300	-	-
Total Administrative Cost	\$ 5,650	\$ 5,650	\$ -	\$ -
Total Transit Budget	\$ 50,000	\$ 18,300	\$ 24,500	\$ 7,200

⁹ This simplification is made to demonstrate the concepts behind cost allocation. A more sophisticated methodology will likely be required in a real-world setting. Organizations seeking to develop cost allocation plans are advised to consult an accountant or program finance personnel knowledgeable of specific requirements for their individual programs.

Figure G-3 Miles, Hours and Fleet Service Outputs used to Calculate Service Rates

		Cost/Vehicle	Cost/Hour	Cost/Mile
Total Annual Miles	7,000			\$ 1.03
Total Annual Hours	500		\$ 49.00	
Total Fleet Size	2	\$ 9,150.00		

The rates shown in Table 3 can be used to establish service agreements between Agency A and Agency B. Figure G-4 applies these rates to the level of service required by Agency A to determine the amount Agency B will need to charge Agency A.

Figure G-4 Service Rates Applied to Calculate Cost of Purchased Service

	Level of Service Required		Service Rate		Total
Total Annual Miles Requested	2,500	X	\$ 1.03/mile	=	\$ 2,571
Total Annual Hours	180	X	\$ 49.00/hour	=	\$ 8,820
Dedicated Vehicles	0.10	X	\$ 9,150.00/vehicle	=	\$915
Total Cost of Purchased Service					\$12,306