# Mobility Management Implementation Study

Draft Final Report

May 2023

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Executive Summary

This report summarizes the Mobility Management Implementation Study (MMIS) completed for the CAMPO region. The study provides a roadmap for implementing a regional mobility management program that aims to address gaps in public transportation, particularly in areas where fixed-route service is limited. When implemented, the program will improve outreach, consolidate transportation information, improve coordination among providers, and ultimately improve the experience of those who need transportation services.

The need for a mobility management program focused on rural areas was a key recommendation of the region's 2018 Updated Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP). A Mobility Coordination Committee (MCC) was charged with implementing recommendations of the 2018 plan. The MCC then recommended engaging a consultant to undertake the MMIS, which commenced late in 2021.

Study Process

CAMPO engaged a team led by Nelson\Nygaard Consulting Associates. A technical steering committee, composed primarily of staff from various agencies, provided guidance. The team gathered background information (studies and interviews) and conducted research on mobility management practices and applicable strategies from other regions. The development of the recommended framework included discussions with individual providers and human service agencies to ensure that the program design would support existing operations.

Program Goals and Recommendations

The mobility management program is organized around three goals:

1. Through **engagement, outreach, and coordination**, offer consistent and easily accessible information on available public transportation services,

2. Through **data collection, needs assessment, and program design**, better address the concerns of people who face mobility challenges, and

3. Through **program evaluation and refinement**, promote and improve coordination and use of technology among providers leading to a better user experience, more transportation services, and reduced operating costs

Program recommendations are to:

- Create a new position of Regional Mobility Manager to oversee the program
- Establish a work plan that ensures the mobility manager works closely with the region's public transportation providers and meets with other agency staff that work with individuals that need transportation.
- Charge the region's Mobility Coordination Committee (MCC) with providing guidance and support to the mobility manager
- Initially fund the program with federal funds with the local match provided by CAMPO member dues.

Expected Program Benefits

The vision for mobility management describes the expected program benefits:

Through a mobility management program (MMP) that grows and evolves over time, the CAMPO region will deliver **improved public transportation information and services for travel throughout the region, particularly in rural areas**. The MMP will **help riders better connect to and use public transportation services** (fixed route, traditional demand response, and on-demand, also known as microtransit). The MMP will **streamline the process of finding travel options in areas where fixed route services are not available**. Older adults, people with disabilities, and people with low incomes, and those who help them, advocate for them, or plan for their needs will benefit from vastly improved coordination. Eventually, **more trips will be shared among providers and accessible technology will improve the user experience**. The program will produce measurable benefits and its lessons will inform other future investments in improved transportation.

1   INTRODUCTION

The Capital Area Metropolitan Planning Organization (CAMPO), with support from Wake County, the City of Raleigh, and the Town of Cary, commissioned a Mobility Management Implementation Study (MMIS). This final report is the culmination of a nearly two-year process. It includes a roadmap for implementing a regional mobility management program (MMP) to address gaps in public transportation, particularly in rural areas where fixed-route service is limited. The MMP is designed to improve outreach, consolidate transportation information, improve coordination among providers, and ultimately improve the experience of those who need transportation services throughout CAMPO's entire planning area (Wake County and parts of Johnston, Harnett, Franklin, and Granville counties). See Figure 1.

STUDY PROCESS

CAMPO, Wake County, the City of Raleigh, and the Town of Cary sponsored the study and engaged a team led by Nelson\Nygaard Consulting Associates. Additional background on the genesis of the MMIS, project goals, phases and tasks is Appendix A.

Technical Steering Committee (TSC) Coordination

A technical steering committee (TSC) composed of transit agency representatives, county and municipal departments, and others provided guidance throughout the MMIS. Figure 2 lists the agencies represented on the TSC. Most agencies designated more than one representative to ensure regular attendance at TSC meetings throughout the course of the project and to help support stakeholder education and participation. The MMIS TSC met six times over the course of the project. Figure 3 lists meeting dates and topics discussed.

Figure 1   CAMPO MMIS Study Area
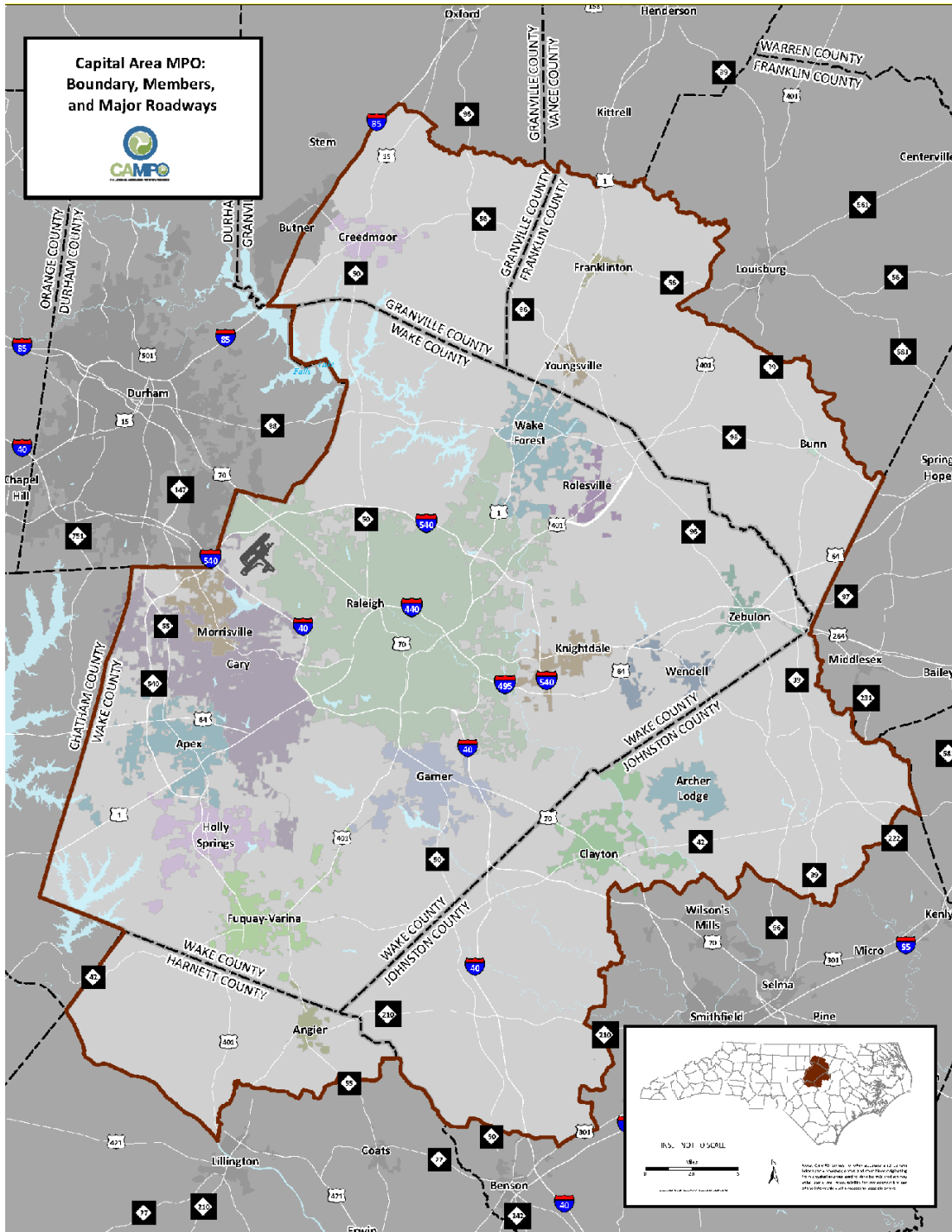
Figure 2   MMIS Technical Steering Committee

TSC Membership			
CAMPO	Johnston County Area Transit (JCATS)	GoTriangle	Eastern Regional Center
GoWake Access/Wake County	Community & Senior Services of Johnston County	Town of Apex	Northern Regional Center
Go Raleigh	Kerr Area Transportation Authority (KARTS)	Community Partnership Network	Southern Regional Center
Town of Cary	Harnett Area Rural Transit System (HARTS)		

Figure 3   TSC Meetings

Meeting Date	Topics Discussed/Areas of Focus
September 2021	Project team and TSC member introductions, project overview
October 2021	Working session to review foundational tasks 2 and 3 and discuss presentations and engagement for Task 4. Also discussed peer review regions.
January 2022	Presented initial findings of Tasks 2 and 3, progress on peer research, and confirmed outreach materials to be used for governing board engagement, including a schedule for such meetings.
April 2022	Held an in-person workshop to design the mobility management program, including identifying priorities and effective ways to obtain user input and market to existing and future users.
October 2022	Held an in-person meeting to review and discuss the draft MMIS implementation framework.
May 2023	Implementation plan review and approval

Plan Development Process

The TSC provided overall study guidance. The process of developing program recommendations was iterative, and included:

- Compilation of prior studies to document applicable programs, services, and recommendations (existing and planned)
- Individual interviews with transportation providers, human service agency staff, and nonprofit organization leaders to document challenges and opportunities
- Research into mobility management practices in other regions to identify best practices, lessons learned, and strategies applicable to the CAMPO region

- Presentations to boards, committees, and other leaders at different times in the process to publicize the study and seek feedback
- Focus groups with public transportation riders, caregivers, transportation providers, and advocates to seek feedback on program priorities
- Additional interviews with transportation providers to document ways to operationalize the program

Summaries of external presentations, focus groups, and transit provider follow-up meetings are included in Appendix B. As noted, the development of the implementation plan was iterative, informed by interviews, review of reports, research, and outreach with guidance provided by the TSC. Figure 4 lists these activities in chronological order noting information gathered and/or topics discussed along with some key takeaways.

Figure 4   MMIS Activities, Topics, and Key Takeaways Supporting Implementation Plan Development

Activity	Timeframe	Topics	Key Takeaways*
Review of Published Studies	Fall 2021	- Planned projects - Funding - Operational data - Regional growth	- Need for technology strategy - Increase in people living in areas with less transit service
Staff Interviews	Fall 2021, Winter 2021-2022	- Service description - Coordination needs - Operational challenges	- Questions about operations impacts - Strong interest in coordinating trips - Include human services agencies
Board Presentations (Round 1)	Winter 2022	Study overview presentations	- General support for the study - Recommendation to conduct focus groups with riders - See Appendix B
Peer Research on Best Practices and Applicable Strategies	March 2022	Regions included: - Austin, Texas - Columbus, Ohio - Denver, Colorado - Nashville, Tennessee - San Francisco, California - Charlotte, North Carolina	- Establish mobility management employment guidelines - Develop, maintain, and publish transportation resource information - Integrate mobility management information into transportation websites - Train customer service staff to assist with management - Integrate transportation demand management and mobility management - See Appendix C
TSC Workshop for Implementation Framework Design	April 2022	- Program goals - Success measures - Concerns	- Consolidate information into a "one-stop shop" - All providers should participate - MCC should continue to provide guidance - FTA Section 5310 funding can be used to support the program
Provider Focus Group	July 2022	- Transit information access issues - Program vision, goals, and priorities	- Centralized, current information important - Connect agency websites to MM program (links) - Understand rider's point of view - See Appendix B

Activity	Timeframe	Topics	Key Takeaways*
Rider Focus Group	August 2022	- Current information challenges - Program vision, goals, and priorities	- Ensure websites are fully accessible - Work with social service agencies and faith organizations - Travel training resources exist (ADA-NC) - Include residents in rural areas in outreach - See Appendix B
TSC Framework Review Workshop	October 2022	- Review draft program framework - Provide feedback on website, mobility manager (MM) position, funding - Provide agency staff feedback /concurrence on the initial program framework and recommendations - Agency staff concurrence to seek leadership framework and recommendations endorsement	- Support for using 5310 funds to hire a mobility manager - Recommend a webpage (not a new website) with links from provider websites - Future coordination with regional trip planner team (GoTriangle) needed - CAMPO can be administratively responsible for the MM position, but he/she should spend time at providers' offices to build rapport with operations staff, customer service teams, planners, etc. - MM should be spending as much time as warranted reaching out to organizations, partners, potential clients, etc. - MM needs to capture the reasons why it is difficult for users to get to the locations that they are trying to reach with existing options for future priorities.
Draft White Paper on Recommended Mobility Management Framework	December 2022	- Study background and process - MMP vision, elements, goals, actions, phasing, and transit agency considerations - Implementation framework and discussion of strategies - Draft participation commitment language	- TSC overall supported framework - Clarification sought on funding needs - Additional provider input needed to clarify MM time allocation and ways to coordinate

Activity	Timeframe	Topics	Key Takeaways*
Board Presentations (Round 2)	Winter 2023	▪ Proposed framework with funding, role, activities ▪ Requests for endorsement	▪ Support for proposed framework obtained from all agency partners
Transit Agency Follow-up Interviews	March 2023	▪ Update current and planned services ▪ Discuss capital projects, technology, and pilot programs ▪ Ongoing challenges and needs ▪ Goals for MM accomplishments (different timeframes) ▪ General concerns ▪ Agency point of contact	▪ MM should fully understand all transportation services ▪ Regional trip coordination and transfers is a priority for rural providers ▪ MM should collaborate with GoTriangle trip planner team ▪ MM should understand and track different scheduling and dispatching software being used ▪ Partnerships should extend to municipalities, NC DOT, and other agencies such as Triangle J ▪ Travel training should include explaining eligibility rules to new riders ▪ See Appendix B

2   MOBILITY MANAGEMENT PROGRAM OVERVIEW

This chapter presents an overview of the recommended mobility management program for the CAMPO region, including a vision for the program, and description of program elements, goals, actions, and phasing.

PROGRAM VISION

Through a mobility management program (MMP) that grows and evolves over time, the CAMPO region will deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The MMP will help riders better connect to and use public transportation services (fixed route, traditional demand response, and on-demand such as microtransit). The MMP will streamline the process of finding travel options in areas where fixed route services are not available. Older adults, people with disabilities, and people with low incomes, and those who help them, advocate for them, or plan for their needs will benefit from vastly improved coordination. Eventually, more trips will be shared among providers and accessible technology will improve the user experience. The program will produce measurable benefits and its lessons will inform other future investments in improved transportation.

PROGRAM ELEMENTS

The following are the proposed mobility management program (MMP) program elements.

- The MMP will be centralized within a single agency. For program administration purposes, CAMPO will administer the program and hire the mobility manager. See mobility manager job description (Appendix F) and recommended work program (Appendix G).
- Initially, one full-time employee will be hired as a regional mobility manager and provided with office space and equipment, comparable to other CAMPO staff.

- While the regional mobility manager will be employed by CAMPO, they will spend some of their in-office time rotating among the provider agencies and/or their operating contractors (GoCary, GoRaleigh, GoWake Access, GoTriangle, GoApex, HARTS, JCATS, and KARTS) at least initially. Rotating among providers will help to both build partnerships and to enable the mobility manager to gain a deep understanding of operations at the various agencies.

- Through a memorandum of understanding (MOU), participating entities (primarily public transportation providers) will commit to the overall program goals, including designating and maintaining an agency point of contact, regularly meeting with mobility management staff, supporting regional public transportation coordination, and supporting ongoing program funding (primarily through CAMPO dues).

- Coordination with human service agencies whose clients rely on public transportation will be primarily through existing programs and providers, primarily through the MCC and its partners. As the program evolves and more entities participate and as needs are identified, additional outreach and coordination activities should be considered.

- The Mobility Coordination Committee (MCC) will serve as the steering committee for the MMP. The MCC will regularly meet to review implementation progress and provide feedback, direction, and guidance to mobility management staff. Because the MCC is currently an informal committee, it should develop and adopt bylaws and procedures for voting on potential policies. Sample agency coordination bylaws are included in Appendix E.

- The MMP will evolve over a minimum five-year time horizon in three phases: short-term (years 1-2), medium term (years 3-4) and longer-term (year 5 and beyond).

- Initial MMP funding will be from FTA Section 5310 resources. If by the end of the 2nd year the program grows and requires further staffing, additional funds may be needed. The MMP should be evaluated using quantitative and qualitative performance measures. Data should be compiled, analyzed, and reported every six months.

PROGRAM GOALS

The recommended program goals are:

1. Through **engagement, outreach, and coordination**, offer consistent and easily accessible information on available public transportation services,

2. Through **data collection, needs assessment, and program design**, better address the concerns of people who face mobility challenges, and

3. Through **program evaluation and refinement**, promote and improve coordination and use of technology among providers leading to a better user experience, more transportation services, and reduced operating costs.

PROGRAM ACTIONS

The following are the recommended actions aimed at achieving the MMP goals:

- Hire and train a new staff person no later than the first part of Fiscal Year (FY) 2024.

- A formalized MCC, operating under bylaws, will provide consistent staff guidance and feedback to ensure successful program rollout and sustainability.

- Consolidate, centralize, and maintain current transportation information for individuals seeking rides and for those working with riders (e.g., social workers, employers, healthcare providers, etc.)

- Implement the communications and outreach strategy aimed at building partnerships with providers and others and marketing available mobility management services. (See Public Outreach & Marketing Strategy chapter.)

- Collaborate with providers of travel training services (transit agencies, schools, nonprofits, etc.) to expand travel training opportunities throughout the region.

- In consultation with the MCC and other coordinating bodies such as the CAMPO TCC and the Wake Transit Transportation Planning Advisory Committee (TPAC), develop and maintain performance monitoring and tracking tools that include both quantitative and qualitative information to improve coordination, regional transportation planning, and internal and external reporting. Share results with the full MCC every six months and with the TCC/TPAC/Executive Board at least once per year.

- Use lessons learned and trends analyses to revisit MMP program design and suggest changes.

- Work with the MCC to help develop future CPT-HSTP recommendations.

- Determine the longer-term potential for trip sharing, especially among rural providers, including the potential of technology to facilitate it.

Supporting text developed explaining the basis for recommendations developed during the plan development is provided in Appendix D, covering organization structure and location, governance, staffing, support, and equipment, and funding and budget. Some of the text has been revised for consistency with final recommendations.

PROGRAM PHASING

The MMP is expected to evolve in three phases over approximately five years. Figure 5 broadly illustrates these phases: Phase 1) startup and rollout, Phase 2) refinement and expansion, and Phase 3) technology integration and trip coordination. Key areas of emphasis are noted during each phase. The highlighted activities are not fully sequential, meaning certain elements continue from inception forward as the program evolves and grows. Similarly, activities envisioned for later years, such as technology integration, will require ongoing conversations and coordination.

Figure 5   MMIS Implementation Phases

START UP & ROLL OUT
- Information gathering, publication, and sharing
- Partnership building and community outreach
- Assistance to individuals and partners

REFINEMENT & EXPANSION
- Expanded assistance to individuals and partners
- Support for coordinated transportation planning
- Evaluation of program metrics and investments

TECHNOLOGY INTEGRATION & TRIP COORDINATION
- Increased provider collaboration and trip sharing*
- Technology investments and integration
- Realization of cost efficiencies

YEARS 1-2   YEARS 3-4   YEAR 5+

* As applicable; provider operations would remain independent

3 IMPLEMENTATION PLAN

This chapter presents the mobility management implementation plan. The framework is organized into specific goals and actions. See Figure 6. Priority strategies are noted. High-level explanatory notes are provided along with specific strategy steps, timeframe, and suggested measures to be used to track progress with additional supporting narrative in Appendix D.

The implementation plan reflects updates to actions based on feedback received during follow-up one-on-one meetings with transit providers as follows:

- Partner outreach emphasizes the importance of the mobility manager spending time at provider locations based on an agreed-upon schedule.
- Development of public-facing materials notes the public need for better awareness of mobility management and that outreach should be targeted accordingly.
- Consistently collected data is needed to track transportation needs
- Mobility management webpage development should be done in conjunction with other agencies' communications protocols and websites.
- The technology strategy includes collaboration on trip planner and scheduling software, including microtransit.
- Identifying opportunities for trip coordination is a new strategy
- Coordination should also involve North Caroline DOT, municipalities, and other agencies such as Triangle J.

Figure 6   Mobility Management Program (MMP) Goals and Actions

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination *Priority Strategy*	**Conduct partner outreach, including site visits with providers**	▪ To be effective, ongoing participation of all public transportation providers is critical to program success. ▪ Other agency, nonprofit, institutional, medical, and educational partners should also be part of outreach ▪ Peer programs regularly and fully engage with providers to develop and strengthen relationships with agency staff ▪ MM staff must demonstrate to providers and governing bodies the value of continued engagement with the MMP	▪ Using information obtained during one-on-one provider follow-up conversations, confirm each agency's MMP liaison ▪ Establish a schedule for regular and recurring visits to provider offices and/or contractor facilities ▪ Confirm other potential partners and interested parties and establish schedule for outreach activities ▪ Develop a schedule for periodic check-ins ▪ Participate in partner events as appropriate ▪ See Public Outreach & Marketing Strategy	▪ Begin at program start ▪ Ongoing strategy	▪ Meetings held and events attended ▪ Number of participants (external events) ▪ Comments received on program effectiveness and actions taken
Engagement, Outreach, and Coordination *Priority Strategy*	**Develop mobility management identity and brand**	▪ Low awareness and understanding of MM ▪ Brand will help build awareness and support ▪ GoForward brand is widely adopted for fixed route and complementary paratransit (ADA) but not for demand-response ▪ Other peer mobility management programs such as DRMAC have a well-defined brand and identify	▪ Create regional MM program brand and identity and use for all emails, publicity, and related collateral ▪ Consider relationship to GoForward to avoid confusion ▪ Conduct follow-up surveys on brand awareness ▪ See Public Outreach & Marketing Strategy	▪ Year 1 (end)	▪ Specific resources created and shared using brand ▪ Brand survey results

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination	**Develop and eventually publish public-facing materials** *Priority Strategy*	▪ Outreach for MMIS has included initial materials ▪ Increased awareness is needed, particularly for entities other than providers ▪ Publicity will be needed to grow the program and collateral materials will help ▪ Publication of public mobility management resources is a peer best practice	▪ Use brand and identity in all electronic and printed media ▪ Identify translation needs for outreach materials ▪ Develop text and graphics for flyers, posters, and other material, including email formats, etc. ▪ Develop materials tailored to social media ▪ Disseminate printed materials at events ▪ See Public Outreach & Marketing Strategy	▪ Year 1 (end); revise as needed	▪ Materials produced and distributed and/or downloaded
Engagement, Outreach, and Coordination	**Conduct targeted outreach** *Priority Strategy*	▪ Providers, affiliates, and sponsoring agencies are aware of the MM program ▪ External outreach will help to expand awareness and form ongoing relationships ▪ Ongoing outreach is a best practice	▪ Work with providers to identify priority groups for outreach and input ▪ Periodically meet with interested groups ▪ Integrate branded materials when available ▪ Seek feedback annually to inform program improvement or redesign in subsequent years (if needed) ▪ See Public Outreach & Marketing Strategy	▪ Year 1 ▪ Ongoing	▪ Meetings held and events attended ▪ Number of participants ▪ Feedback received on program effectiveness and recommendations for program modifications
Engagement, Outreach, and Coordination	**Participate in regional transportation planning coordination**	▪ Advocacy is needed for MM, particularly in rural areas ▪ Data obtained through outreach and interactions will support future decisions ▪ As region grows and new services are planned, MM needs to be involved	▪ Participate in ongoing transportation planning activities such as the forthcoming coordinated plan update (subject to time availability)	▪ Year 2 (launch) ▪ Ongoing	▪ Meetings attended ▪ Committees joined ▪ Notes

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Engagement, Outreach, and Coordination	**Develop and maintain transportation services information and database** *Priority Strategy*	■ The CPT-HSTP identified the need to improve information about the availability of existing services. ■ Consolidating service information and making it broadly available is a key tenet of mobility management ■ Almost all peers compile provider data (printed, website, formal travel planner) ■ Process of compiling and maintaining information will improve coordination through relationships that are established ■ See Improving Access to Information in Appendix D.	■ Develop electronic resource (spreadsheet or database) listing all available service characteristics with a focus on demand-response ■ Coordinate with providers to regularly share information updates ■ Work with each CAMPO area provider to identify methods for customer interactions regarding available services in the region ■ Publish information as a downloadable document ■ See Public Outreach & Marketing Strategy	■ Year 1 (end): compile hard copy ■ Year 2 (end) develop electronic version ■ Revise annually	■ Participating agencies ■ Number and type of documents distributed and/or downloaded ■ Frequency and timing of updates
Education, Outreach, and Coordination	**Design, launch, and maintain mobility management webpage**	■ Peer local/regional MM programs have dedicated websites (see DRMAC's Getting There Guide) ■ Should be part of brand awareness and outreach efforts ■ Can be a source for document downloads, requests for assistance, participation in webinars and conferences, etc.	■ Determine who will host dedicated webpage ■ Develop content and links ■ Work with providers to confirm messaging for directing visitors to MM webpage from their provider websites ■ See Public Outreach & Marketing Strategy	■ Year 1 (end): complete: basic landing page describing program ■ Year 2 (end): launch webpage ■ Revise annually	■ Publication of site ■ Visitors ■ Document downloads, including directory

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Education, Outreach, and Coordination	**Refer riders to transportation options**	▪ Some MM programs make direct transportation referrals. MM staff person should be equipped to direct any inquiries received to specific providers and track instances when solutions are not available. ▪ This task is challenging without an online trip planner or staffed call center ▪ Initially, MM efforts should focus on coordination with agencies and nonprofits and not on clients	▪ Document all available transportation services and eligibility rules ▪ Work with individual providers to identify best ways to support referral process ▪ Develop communications protocols for describing ways MM program can assist and publish on MM webpage	▪ Year 1: begin referrals ▪ Ongoing	▪ Agency and organization contacts ▪ Approach to addressing inquiries and tracking requests ▪ Solutions not found
Education, Outreach, and Coordination	**Refer riders to travel training**	▪ CPT-HSTP noted need to expand travel training to rural areas and to areas with new fixed-route services ▪ Many local/regional peers offer travel training services ▪ Programs are tailored to individuals with different disabilities and to older adults that retire from driving ▪ Some peers provide training directly, others refer to existing programs, and others also train travel trainers to offer peer-to-peer training or specialized training	▪ Identify past and existing travel training programs in the region, including those by transit providers and those by other agencies, including Alliance of Disability Advocates ▪ Build a network of trainers who can expand to other areas ▪ Possibly directly deliver training in rural areas where needed, but additional resources would likely be required	▪ Years 1-2: refer to existing programs ▪ Year 3+: deliver training in rural areas	▪ Training requests ▪ Trainers trained ▪ Training provided

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Data Collection, Needs Assessment, and Program Design	**Compile data, records of client and agency contacts, and lessons learned** **Priority Strategy**	▪ CPT-HSTP noted need to track and report transportation demand in rural communities to identify how needs are being met and what else is needed ▪ According to national research, successful mobility management programs conduct ongoing assessments of transportation needs in their community so they can effectively respond to changes and modify their programs accordingly. ▪ Efforts to advocate for more services depend on well documented needs, particularly trend analysis ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance) ▪ Consider developing a data dashboard for use in meetings with other agencies and sponsors	▪ Year 1: basic reports ▪ End of Year 2: data dashboard ▪ Ongoing	▪ Trend analyses ▪ Clients served ▪ Agencies participating ▪ Unmet needs (i.e., solutions not available for requests made)
Data Collection, Needs Assessment, and Program Design	**Identify opportunities for trip coordination**	▪ The region's rural area providers provide transportation service to clients traveling to regional medical centers and other city destinations and wish to identify ways to facilitate transfers to other providers' vehicles when services overlap ▪ To coordinate such trips, better information is needed on which providers have capacity and could possibly fulfil the trip request, potentially through data exchanges ▪ Convenient locations need to be identified where vehicles can meet and where riders can transfer	▪ Work with rural providers (HARTS, JCATS, KARTS, GoWake Access) to map common destinations, service schedules, funding programs, etc. ▪ Quantify extent of demand for overlapping service ▪ Document opportunities and constraints for trip sharing including program rules ▪ As applicable, identify locations for potential transfers ▪ Work to identify potential pilot program	▪ Year 2	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Program Evaluation and Refinement	**Meet regularly with decisionmakers** **Priority Strategy**	▪ Support exists for MM conceptually, but participation and funding commitments are needed ▪ Periodic presentations will build awareness and support ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ Identify priority boards and committees for initial and follow-up outreach ▪ Attend meetings in person and collect feedback	▪ Priority 1 ▪ Ongoing	▪ Meetings attended with basic summaries ▪ Comments received and actions taken
Program Evaluation and Refinement	**Use compiled data and records of client and agency contacts to refine program priorities** **Priority Strategy**	▪ According to national research, successful programs establish methods for assessing program progress and outcomes and for communicating to appropriate decision makers and audiences ▪ Mobility managers work with local stakeholders to refine program goals based on quantitative and qualitative measures ▪ See Managing, Refining, and Advancing the MMP in Appendix D.	▪ Based on data tracking covered in other action items, compile surveys, results of outreach, and other metrics ▪ Produce and disseminate reports every six months ▪ Seek feedback from others and guidance from MCC on program refinements	▪ Every 6 months	▪ Include narratives of client and partner interactions ▪ See other strategy measures
Program Evaluation and Refinement	**Participate in staff training and development** **Priority Strategy**	▪ Mobility managers hired for the region should have professional development and networking opportunities to both learn from others and to consider mobility management a career ▪ A newly established certification program launched in November 2022 (see Easter Seals Project Action website)	▪ Allocate time for annual professional development and budget for conference attendance and certification courses ▪ Establish goals for annual professional development ▪ Monitor progress ▪ Once certification obtained, maintain	▪ Year 1 ▪ Ongoing	▪ Conferences attended ▪ Contacts identified ▪ Progress toward certification (credit hours completed ▪ Maintenance of certification

Goal Category	Action	Observations/Notes	Steps	Timeframe	Tracking/Reporting
Program Evaluation and Refinement	**Provide technology assistance and related advocacy**	▪ CPT-HSTP notes need to represent rural residents in conversations about technology ▪ More on-demand services are being provided (e.g., GoWake SmartRide NE) or considered ▪ Trip planning via smartphones is more common, but demand-response transportation options are not integrated ▪ The GoTriangle regional transit technology study did not fully consider demand-response transportation, including microtransit.	▪ Track adoption of scheduling and dispatching software, microtransit booking applications, and other trip planning tools ▪ Coordinate with GoTriangle (lead agency for regional trip planner) ▪ Participate in ongoing regional transportation technology discussions ▪ Understand how users are learning about services ▪ Advocate for including all demand-response services in technology integration efforts ▪ Identify opportunities for technology integration pilot for potential trip sharing	▪ Year 3+	▪ Document technology challenges raised during outreach and coordination, including meetings attended ▪ Track relevant technology evolution and use

4 PUBLIC OUTREACH & MARKETING STRATEGY

Outreach and marketing is a critical element of mobility management. When implemented, the outreach and marketing framework presented in this chapter will help achieve the overall program vision: to improve access to public transportation services for those who need it most—particularly in rural areas—by making it easier to learn about and use available services. The mobility manager, with support from the MCC, will be responsible for outreach and engagement activities, including identifying and working with target audiences, developing and implementing a communications strategy, and compiling information and feedback that supports program growth. As with other mobility management activities, this strategy will likely evolve, and priorities should be revisited at least annually.

OUTREACH GOALS

The main outreach goals for the MMP are to:

- Promote mobility management, increasing program awareness
- Communicate information on available public transportation services and compile information, data, and feedback
- Achieve program growth (riders, partners) and sustainability (funding, board support)

TARGET AUDIENCES

The key target audiences for program outreach are:

- Riders: current riders, potential riders, caregivers, etc.
- Providers: transit agencies and their contractors (both fixed-route and demand-response), other public providers, private providers
- Government: county and municipal leaders, staff who work with riders and providers

▪ Others: nonprofit organizations, employers, medical providers, etc.

ENGAGEMENT ACTIVITIES

Outreach and engagement activities are organized into meetings, information sharing, and data compilation. Additional details on specific steps are also included in the implantation framework (see Figure 6).

Meetings

As noted, the four target audiences include riders, providers, government, and others. Activities would take place via:

▪ Ongoing collaboration with provider staff

▪ Participation in committee meetings

▪ Presentations to governing boards

▪ Outreach at hosted events

▪ Targeted meetings with interested agencies, businesses, and organizations

This will involve:

▪ Working with providers to identify priority groups for outreach and input

▪ Confirming boards and committees for initial and follow-up outreach

▪ Confirming other potential partners and interested parties and establishing a schedule for outreach activities

▪ Participating in partner events as appropriate

▪ Attending meetings and collecting feedback

Information Sharing

The mobility manager will be responsible for developing content for use at meetings, for publicity, and for growing the program. This will involve:

▪ Leading development of the program brand and identity

▪ Developing content for, launching, and managing mobility management webpage

▪ Compiling and managing a directory of all available transportation services and eligibility rules

▪ Producing and distributing printed and electronic materials (presentation slides, posters, monitor content, handouts, business cards)

- Drafting and disseminating an email newsletter
- Promoting mobility management on social media

See discussion of program materials below.

Data Compilation

The mobility manager will seek input and feedback and collect data by:

- Speaking with conversations with riders, providers, agency staff, and others
- Seeking, documenting, and sharing summarizing feedback received
- Conducting periodic surveys on program activities to inform improvements
- Developing, disseminating, and using forms to track requests (e.g., specific trips, travel training, and other assistance)

PROGRAM MATERIALS

Program materials include a brand and identify, printed materials, and electronic communications, as described below. Additional marketing guidance is available from the National RTAP (Rural Transit Assistance Program's marketing toolkit.[1]

Mobility Management Brand and Identity

Development of a mobility management identity and brand is a priority strategy. This includes a logo, color palates, and fonts for use in all materials to be developed with input from the MCC. Figure 7 shows how the Denver region's DRMAC uses its brand to promote a travel training course.

Printed Materials

Printed materials include posters for placement in public places where riders and others can learn about the program such as on bulletin boards or

Figure 7: Brand Integration in Promotional Content

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[1] See https://www.nationalrtap.org/Toolkits/Marketing-Toolkit/Welcomeform

in transit vehicles. Flyers can be developed as meeting handouts. Business cards that include an email address and a QR code for the program website should be created at the appropriate time and handed out to interested individuals. A sample poster for placement in a public building is shown in Figure 8.

Figure 8   Sample Mobility Management Poster

A sample handout for elected officials or agency boards is shown in in Figure 9. Text explaining the program to members of the public and to external organizations plus contact information is shown in Figure 10. The alternative text would replace the narrative shown on the agency board example beneath the large blue text box.

Figure 9   Sample Mobility Management Handout for Elected Officials and Board Members

Capital Area Mobility Management Program

SAMPLE HANDOUT

Helping people connect to public transportation options

The Capital Area mobility management program is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities.

The program was launched in 2023 with funding from the Federal Transit Administration with local matching funds provided by CAMPO members. We work with transit agencies, external partners such as government agencies, nonprofit organizations, employers, and healthcare providers to:

- Help riders better connect to and use public transportation services.
- Streamline the process of finding travel options where fixed-route transit is not available.
- Provide more services to and advocate for older adults, people with disabilities, and people with low incomes.
- Increase the availability of travel training for those who need it.
- Through improved coordination, share trips among providers to increase efficiency.
- Offer better technology options to enhance the user experience.

The CAMPO Mobility Coordination Committee provides overall program guidance to the mobility manager. For mor information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit:

URL PLACEHOLDER

QR CODE

Figure 10 Draft Narrative for Handouts to Boards, Riders, and External Organizations

Board Handout (See Figure 9)	Riders (Alternative Text)	External (Alternative Text)
The Capital Area mobility management program is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities. The program was launched in 2023 with funding from the Federal Transit Administration with local matching funds provided by CAMPO members. We work with transit agencies, external partners such as government agencies, nonprofit organizations, employers, and healthcare providers to: ■ Help riders better connect to and use public transportation services. ■ Streamline the process of finding travel options where fixed-route transit is not available. ■ Provide more services to and advocate for older adults, people with disabilities, and people with low incomes. ■ Increase the availability of travel training for those who need it. ■ Through improved coordination, share trips among providers to increase efficiency. ■ Offer better technology options to enhance the user experience.	The Capital Area mobility management program helps to improve public transportation services throughout the region, particularly our rural areas. If you or someone you know needs transportation, we're here to help explain what's available, who is eligible, and how to use public transportation.	The Capital Area mobility management program, funded through the Capital Area Metropolitan Planning Organization (CAMPO), is working to better coordinate public transportation services in the region, particularly in our rural areas. Our regional mobility manager works closely with transportation providers and other organizations to centralize information, compile data, and support transportation planning activities. We work with partners such as government agencies, nonprofit organizations, employers, and healthcare providers to: ■ Help riders better connect to and use public transportation services. ■ Streamline the process of finding travel options where fixed-route transit is not available. ■ Provide more services to and advocate for older adults, people with disabilities, and people with low incomes. ■ Increase the availability of travel training for those who need it. ■ Work to improve coordination and enhance the user experience.
The CAMPO Mobility Coordination Committee provides overall program guidance to the mobility manager. For mor information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit:	For more information, visit:	For more information on program activities and accomplishments, contact our regional mobility manager at [email address] or visit

Electronic Communications

Webpage

A mobility management webpage will enable visitors to learn about the program, download available information (e.g., directory of services), contact the mobility manager, and link to other public transportation resources. Once fully developed, each transportation agency partner should include information on the program and provide links to the webpage. Published content should reflect staff capacity to respond to inquiries and maintain information.

Slide Deck and Promotional Slide

Using a template based on the brand and identity, a PowerPoint presentation deck can be used for engagement or for promotion. The promotional slide might be displayed on a public building monitor or on a local cable channel. See Figure 11 for an example.

Figure 11 Example Promotional Slide for Television or Building Monitors

Email Newsletter

A periodic email newsletter, with the integrated brand is an effective way to communicate with stakeholders. The newsletter should primarily target government partners and other organizations, along with the participating providers and other interested parties. It is expected that the first newsletter should be disseminated

approximately six months into the program launch, and then shared at least twice per year at approximately six-month intervals. It is suggested that email marketing tools be used to measure how many individuals open and/or forward the newsletter to others.

Figure 12 Sample Mobility Management Newsletter Content

Source: Commonwealth of Massachusetts

Additional Guidance

Additional guidance on collateral resources and marketing is available through the FTA-sponsored National Rural Transit Assistance Program (RTAP).[2]

POINTS OF CONTACT

Figure 13 lists the contact names and email addresses of the primary points of contact as well as any additional points contact at each transportation provider agency.

Figure 13 Transportation Provider Points of Contact (as of May 2023)

Provider	Name	Email	Other contacts
GoCary	TeLeishia Holloway	teleishia.holloway@carync.gov	Kevin Wyrauch and Kelly Blazey (planning) Fabian Rodriquez (outreach)
GoRaleigh	Sean Abrams	Sean.abrams@raleighnc.gov	David Walker (planning)
GoWake Access	Anita Davis, Transportation Program Manager	Anita.Davis@wake.gov	Nikki Abija (Transportation Planner)
GoTriangle	James Carter, Transit Service Manager	jcarter@gotriangle.org	Austin Stanion, Service Planning Manager, Tammy Romain, Paratransit Manager, Shelly Parker, Sustainable Travel Services Manager (employers), Michelle Peele, Wake Transit Manage Include communications team for marketing and outreach activities
JCATS	Neal Davis	Neal@cssjohnston.org	
HARTS	Barry Blevins, Director of General Services	Bblevins@harnett.org	Chance Torain (Transit Operations)
KARTS	Mary Young (Interim Executive Director)	Director@kartsnc.com	Alison Pegram (Transportation Coordinator)
Town of Apex	Katie Schwing, Senior Planner, Long Range Transit	Katie.Schwing@apexnc.org	Shannon Cox, Long-Range Planning Manager,

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[2] See https://www.nationalrtap.org/Toolkits/Marketing-Toolkit/Welcome.

APPENDIX A: STUDY BACKGROUND

MOBILITY MANAGEMENT RECOMMENDATIONS (EXCERPTED FROM CPT-HSPT)

Short Term Recommendations (2019–2022)

From Figure 6-1 Recommendations Implementation Table (short-term recommendations)

- 1.1 Establish Mobility Coordination Committee (MCC)
- 1.2 Create consistent regional UZA ADA structure incorporated into individual provider ADA plans
- 1.3 Coordinate ADA service delivery
- 1.4 Initiate rural transportation network
- 1.5 Monitor state Medicaid transportation program
- **1.6 Develop mobility management program**
- 1.7 Develop emerging mobility policy (supported as part of Task 1.6)

Develop Rural Mobility Management Program

Mobility management provides a "case worker" approach to solving transportation needs by helping individuals (or organizations) understand their options and how to access transportation services…It helps coordinate public transit and human service transportation because the case worker has access to the full set of transportation services and works with individuals to match needs with available travel options. The CPT-HSTP Update recommends developing a mobility management program with a focus on western Johnston County and Wake County's rural and small -town communities.

Based on direction from the CAMPO Executive Board leadership, the recommendation 'Develop a Mobility Management Program was advanced from a Tier II - Medium Term Recommendation to begin in the year 2023 to a Tier I recommendation that begins in 2019. However, developing the program including the addition of a mobility manager can be used to help assist the [Mobility Coordination Committee (MCC) (made up of various agency staff and stakeholders) implement the plans recommendations and assist in the coordination.

A mobility management program will help address gaps identified in the CPT-HSTP Update that demonstrated a need for more and more accessible transportation in Wake's rural communities and areas in western Johnston County, including the Town of Clayton. The mobility manager program will also be able to collect data on needs to help influence other human service transportation programs and services. A mobility management program can be developed quickly and efficiently with the MCC using funding from the Wake Transit Plan or FTA 5310 funding.

Key steps to program development include:

- Research various types of mobility management models and ensure consistency with regional needs.
- Confirm and prioritize mobility management program goals and prepare a program budget and organizational location for staff.
- Finalize and apply for funding source and hire mobility manager(s).
- Work with stakeholders to advertise services and encourage them to refer clients to mobility manager. Develop referral infrastructure as needed.
- Evaluate program at six-month intervals at least for the first 18 months of program implementation. Adjust and refine program based on evaluation findings.
- Consider alternatives to address human service inter-county transportation needs and demands

Once developed, the mobility management program can also assist with a variety of other rural transportation programs in Wake and Johnston Counties. In Wake County, mobility management program staff could collaborate with Regional Center staff to help clients find transportation and potentially work with town staff to develop Community Funding Area Programs. Regional Center staff could also work with a mobility management program to develop and support zone-based transportation scheduling, so that trips are coordinated and scheduled regionally. In Johnston County, mobility management staff could work with Johnston County staff to help streamline and improve the referral and trip referral processes, as well as increase ride sharing to reduce the cost

per trip. Finally, the mobility management program would also represent rural residents in conversations about emerging mobility and implementation of programs like travel training but also accessible technologies. Combined, there are numerous ways and opportunities for the mobility management program in Wake and Johnston counties to become a critical part of the network of resources linking travelers, towns/cities, human service agencies and the Wake Transit Plan investments. There are a handful of concerns with this approach including identifying a lead agency, developing a structure to share costs, and ensuring the program's administration costs are effectively managed.

The MCC will create a forum to discuss opportunities to oversee the implementation of new services and identify opportunities to coordinate services in rural areas. The CPT-HSTP Update recommends moving towards mobility management but implementing this slightly later in the program. In the meantime, MCC can help build infrastructure for mobility management through improved data collection, travel training, and work with GoWake Access TAB, the Regional Centers in Wake County, and the Johnston County TAB.

MOBILITY COORDINATION COMMITTEE (MCC)

The Mobility Coordination Committee (MCC), was established with the following purpose:

> The intent of establishing the Mobility Coordination Committee (MCC) was to create the infrastructure and an organization to manage and guide ongoing coordination activities in the urbanized area and to assign this group responsibility for implementing the CPT-HSTP goals and recommendations. Consisting of staff level agency participants, the MCC provides policy recommendations, acts as a sounding board for stakeholders and helps provide oversight while deploying the recommendations outlined in the plan. Recommendations of the plan are presented in three implementation tiers: short-, medium-, and longer-term timeframes. (CPT-HSTP, Section 6).

STUDY GOALS

The goals of the MMIS are to:

- Provide expert, concise, and comprehensive information and recommendations to help determine participation levels in the regional mobility management program.
- Clarify best practices, approach, and structure for implementing a mobility management program.

- Through an interagency agreement, incentivize partnerships and coordination to build a successful, scalable mobility management program.
- Assist participating agencies in establishing a viable mobility management program that lays a strong foundation for future growth and improved coordination.
- Develop an implementation strategy, plan, and schedule.

The MMIS included two phases. Phase I explored the readiness, options, and foundation for a mobility management program. Phase II refined the implementation strategy for participating agencies. See

Figure 14 MMIS Tasks

Task	Phase	Description
1	I & II	Project management & coordination
2	I	Review of key studies & plans
3	I	Review of existing & planned services & programs
4	I & II	Engagement & presentations
5	I	Peer review & best practices analysis
6	I	Recommended implementation framework & associated transit service impacts
7	I	Phase I "white paper" recommendations & report
8	I & II	Interagency participation agreement
9	II	Detailed implementation strategy
10	II	Participants' operational review, analysis, & recommendations
11	II	Public outreach & engagement strategy
12	II	Study final report

APPENDIX B: STUDY OUTREACH ACTIVITIES & INPUT RECEIVED

This appendix includes information on presentations to governing bodies and others, focus groups undertaken, and the input received during transit provider follow-up meetings.

PRESENTATIONS TO GOVERNING BODIES & OTHERS

In the winter of 2021, members of the TSC, CAMPO staff, and the consultant team met with several agency governing bodies and others to introduce the MMIS and seek input. The team provided participants with the MMIS flyer and primer and gave a brief presentation. Figure 15 lists the organizations and meeting dates. The team provided materials but did not meet with the Wake Transit Policy Advisory Committee (TPAC). Generally, leadership was excited about the agencies working together on a regional program and supportive of learning more about mobility management, expectations for the program and any associated program costs. In the winter of 2023, the mobility management plan framework was presented to the governing bodies. See Figure 15.

Figure 15   Board and Committee Presentations

Organization	Presentation Date
Introductory Meetings	
JCATS Transportation Advisory Board (TAB)	2/10/22
GoWake Access TAB	2/10/22
GoRaleigh RTA Board of Directors	2/10/22
City of Raleigh City Council	3/15/22
City of Raleigh Mayor's Committee for Persons with Disabilities	2/17/22
GoCary Transportation Working Group	2/15/22
CAMPO Technical Coordinating Committee (TCC)	2/3/22
CAMPO Executive Board	2/9/22
KARTS Executive Board/TAB	4/15/22
Plan Framework Presentations	
JCATS Transportation Advisory Board (TAB)	Jan 2023
GoWake Access TAB	2/1/23

Organization	Presentation Date
GoRaleigh RTA Board of Directors	2/9/23
Harnett County Board of Commissioners	2/14/23
KARTS Executive Board/TAB	2/21/23
GoCary Transportation Working Group	2/21/23
CAMPO Technical Coordinating Committee (TCC)	3/2/23
CAMPO Executive Board	3/15/23

FOCUS GROUPS

Provider/Helper Focus Group

Held on July 28, 2022, the provider/helper focus group was attended by eight participants, not including CAMPO or consultant staff. The meeting included a PowerPoint presentation describing the overall mobility management program vision and use of a whiteboard to record comments about three topics:

1. Improving access to quality information
2. Program priorities – where to focus resources first
3. Outreach – how to promote the program to riders and others

Figure 16   Provider/Helper Focus Group Sample Whiteboard Slide
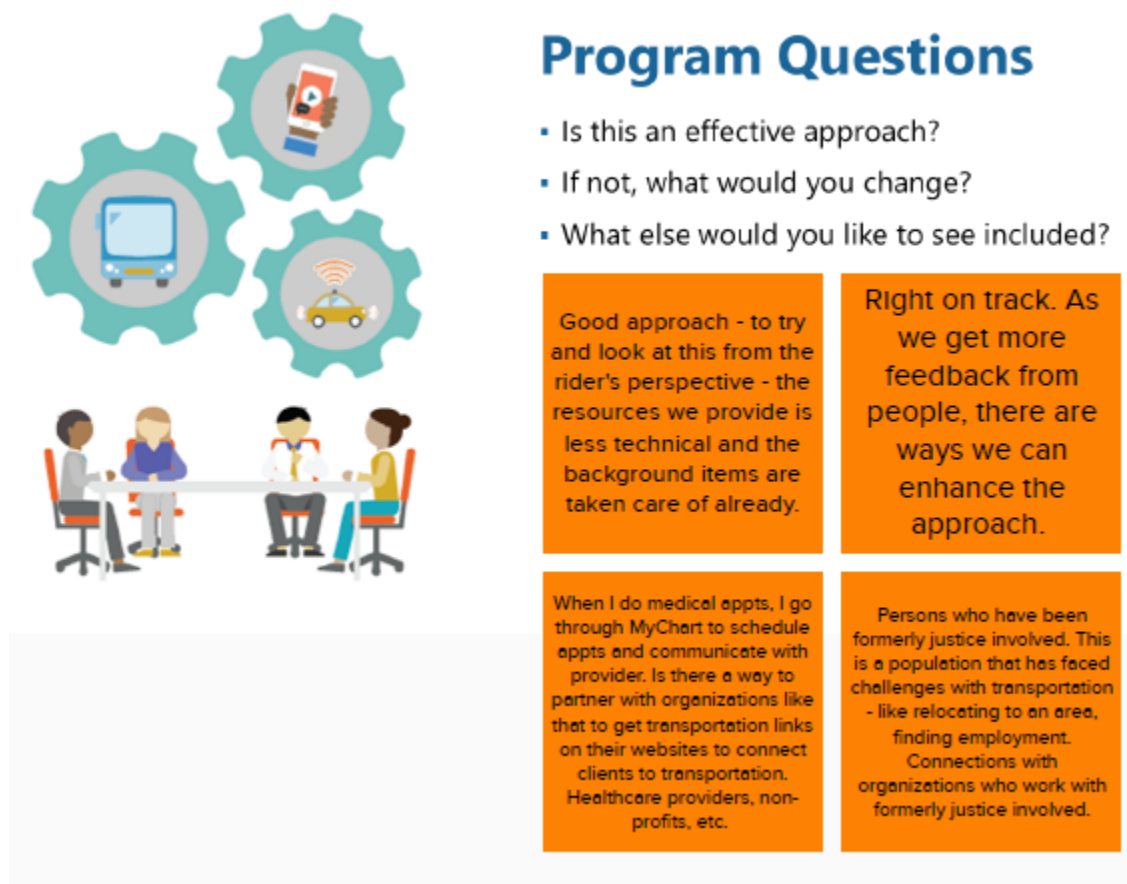
Rider Focus Group

Held on August 18, 2022, the provider/helper focus group was attended by ten participants, not including CAMPO or consultant staff. The meeting included a PowerPoint presentation describing the overall mobility management program vision and use of a whiteboard to record comments about three topics:

1. Improving access to quality information
2. Program priorities – where to focus resources first
3. Outreach – how to promote the program to riders and others

Meeting summaries for both focus groups are provided below. The team used input from these meetings to refine the proposed program design.

TRANSIT PROVIDER FOLLOW-UP MEETINGS

In March 2023, as part of Task 10 (Participants' Operational Review, Analysis, & Recommendations), the project team conducted one-on-one conversations with the region's transit providers (GoTriangle (including TJCOG/TDM), GoRaleigh, GoCary, GoWake Access, GoApex, HARTS, JCATS, and KARTS).

These discussions covered current and planned services, capital projects, technology, pilot programs, and ongoing agency challenges, needs, and concerns. Each provider designated primary and secondary points of contact for coordination with the mobility manager. Participants answered project team questions about the mobility management program (immediate goals, desired outcomes by the end of the program's second year). Some participants asked additional questions or shared ideas.

Key Themes and Considerations

Some regionally applicable themes and applicable considerations, summarized below, identify important areas of focus as the mobility management program is implemented. Applicable action items for the mobility manager are also included for each theme.

Transportation Information Management

A common theme is the importance for the mobility manager to fully understand the different available services. In addition, reporting is needed on tracking unfulfilled trip requests including reasons (e.g., no service available at that time, capacity, area not served, rider not eligible, etc.). Having good data and associated reporting can lead to more dedicated funding.

Mobility Manager Action Items

- Become familiar with all available services and track any changes in schedules, fares, eligibility, etc.
- Develop, share, and maintain consistent reporting tools.

Regional Trip Coordination and Transfers

For providers whose customers wish to travel to locations outside of their service areas, the complexity of making transfers, constraints on service capacity, and long trip lengths present ongoing challenges. This is particularly an issue for medical appointments in Raleigh as well as in Durham and Chapel Hill. It will be important to identify and track the demand for such trips and to design ways to share trip requests with other providers. If transfers become part of the journey, designated transfer points will be needed.

Operations managers from each agency will need to work together to identify where and when this is feasible.

Mobility Manager Action Items

- Develop consistent forms for tracking regional trips requiring more than one provider and/or not served by any provider.
- Analyze travel patterns and trip routes to identify possible transfer locations.

Trip Planning Resources

GoTriangle manages the regional fixed-route trip planner, the same planner available through GoCary, GoRaleigh, and GoDurham. Information on the GoApex's ACX route is available since it is operated by GoCary's contractor. Trip planning information is not available for the multiple demand-response services (including microtransit). More work will be needed to try to integrate other mobility services into trip planning, whether through the existing GoTriangle-managed planner or new resources.

Mobility Manager Action Items

- Collaborate with GoTriangle and other agencies in any trip planner resource improvements.
- Track and report on other technology improvements as they develop.

Software Compatibility

Demand-response transportation providers in the region use different software for scheduling and dispatching, including for microtransit, and some are working to integrate new software tools. While it is not necessary for all providers to be on the same platform, the ability to communicate with other applications to exchange schedules, potential vehicle locations, and trip requests is an important longer-term goal. As the mobility manager becomes more familiar with each agency's operations, it will be important to identify opportunities for data exchange.

Mobility Manager Action Items

- Become familiar with scheduling and dispatching software used by each provider as well as for microtransit services.
- Track any plans to upgrade/replace software.

Additional Partnerships and Coordination

Since some of the demand for travel extends beyond the CAMPO region, it will be helpful to also coordinate with agency partners such as the Durham-Chapel Hill-Carrboro MPO, North Carolina DOT, and Triangle J, among others.

It is also important to include municipalities regardless of whether transit service is available in those communities. This includes the Community Funding Areas (CFAs) in Wake County as well as smaller cities throughout the CAMPO region such as Anger (HARTS) and Clayton (JCATS).

Mobility Manager Action Items

- Periodically coordinate with other regional or state agencies to understand their programs.
- Establish and maintain relationships with municipalities, particularly those considering future transit services.

Travel Training

Educating new riders on how to use available services is important. This includes understanding eligibility rules. It also includes training individuals on how to transfer to and/or ride fixed-route service where applicable.

Mobility Manager Action Items

- Identify existing travel training programs in the region, such as those developed by the Alliance of Disability Advocates to learn about program delivery.
- Work with individual providers to identify specific travel training needs.

Detailed notes from each provider meeting are presented on the following pages.

GOTRIANGLE

Operations Considerations

Points of Contact

- Primary: James Carter, Transit Service Planner
- Others: Austin Stanion, Service Planning Manager, Tammy Romain, Paratransit Manager, Michelle "Shelly" Parker, Sustainable Travel Services Manager/TDM (employers), Michelle Peele, Wake Transit Manager, Shuchi Gupta, Triangle JCOG, Include communications team for marketing and outreach activities

Service Notes

Fixed Route

- Directly operated service
- As a regional provider, responsible for transit service throughout Triangle region, which extends beyond CAMPO Study Area

Demand Response

- Directly operated service
- GoTriangle Access: complementary paratransit (ADA) provided for GoTriangle's all-day routes
- Accepts trip requests for ADA paratransit eligible riders from GoRaleigh and GoCary (also Durham and Chapel Hill)
- For ADA riders traveling regionally (e.g., between Raleigh and Durham), through seamless agreement, GoTriangle will provide the full trip and invoice local provider; eliminates need for rider transfer and coordination
- Riders generally know to call GoTriangle Access to reserve the regional trip

Location

- Operations and Administration: 4600 Emperor Boulevard, Durham

Scheduling and Dispatching Software

- Trapeze PASS

Trip Planner

- GoTriangle manages the trip planner for the entire region
- Currently provides information on fixed-route service only; other services not described, and websites do not provide any suggestions on contacts for more information
- For TDM, GoTriangle is investigating working with Umo app, a multimodal trip planner
- Not aware of an ongoing transit provider technology working group to investigate new software options
- Austin Stanion is point of contact for future trip planning and transit technology topics

Other Notes

- Triangle J Council of Governments coordinates reginal transportation demand management (TDM) programs, including with GoTriangle
  - Shuchi Gupta, Senior Planner/TDM Coordinator is point of contact
  - Important to integrate TDM into MM program by meeting periodically, identifying potential program overlaps, investigating joint marketing opportunities, and maintaining ongoing communications
- Growing interest in local on-demand transportation (e.g., microtransit) leading to multiple services and providers; important to track and coordinate
- Engagement with NCDOT important

Goals and Expectations

- Interest in seeing similar mobility management activities in Durham-Chapel Hill-Carrboro and for interregional coordination

GORALEIGH

Operations Considerations

Points of Contact

- Primary: Sean Abrams, Senior Transportation Analyst, Byanka Pierce, Customer Service Rep
- Planning: David Walker

Service Notes

- Contracted fixed-route service – RATP Dev – new contractors
- Contracted complementary paratransit (ADA) GoRaleigh Access: RATP Dev – new contractor; combined with GoWake Access
- Service changes funded by Wake Transit Plan are increases in frequencies, changes to routes, alignment changes, serving same general area - not a change to service area

Location

- GoRaleigh Access Operations: 1430 South Blount Street, Raleigh

- Admin: no city staff located at Access facility, but some transit admin staff will work in the new facility
- Future combined paratransit center (with GoWake Access) will include space for more administrative staff; funded through Wake Transit Plan; in negotiations for land purchase; expected

Scheduling and Dispatching Software

- New vendor recently selected

Trip Planner

- Same as GoTriangle

Other Notes

- Coordinate with Mayor's Committee for Persons with Disabilities

Goals and Expectations

- To ensure the MM fully understands the different services
- While no travel training programs are in place, it may be beneficial to consider it to encourage more use of fixed route

GOCARY

Operations Considerations

Points of Contact

- Primary: TeLeishia Holloway, Transit Program Coordinator
- Planning: Kevin Wyrauch, Kelly Blazey
- Outreach: Fabian Rodriquez

Service Notes

- Contracted fixed-route service; provide Apex's fixed-route service through contractor
- Contracted demand-response (door-to-door) service offered in three tiers; provide Morrisville's microtransit service through contractor
- Service remains fare free and is likely to stay this way

Location

- Operations: 1107 Trinity Road, Raleigh
- Administration: TeLeishia: 120 Mary Odell Place, Cary (senior center)
- Administration: Kevin and Kelly: 316 N Academy St, Cary (town hall);
- Note: Cary is in designing a new maintenance and ops facility; have a site designated (in design phase). Once complete, town transit staff would be co-located there.

Scheduling and Dispatching Software

- Trapeze

Trip Planner

- Same as GoTriangle

Other Notes

- Several retirement communities have their own shuttles - typically only a few days/week
- TeLeishia supports eligibility reviews and provides mobility management assistance through her on-site work at the senior center.
- Total Life Center located adjacent to senior center; receive many trip requests to this destination, including from outside Cary (e.g., Garner), which GoCary cannot fulfill
- Barriers - not being able to accommodate people who want to get into Cary - since not a resident, service area, reach out to partners, try to coordinate travel
- Difficult to track unmet needs

Goals and Expectations

- Would like to serve more Cary residents who wish to travel outside of Cary; capacity for such trips is limited; coordinate more with regional fixed route (GoTriangle)
- Want to see MM get to know the agencies ASAP, so can provide solutions
- Have centralized information, a one stop shop
- Clarify eligibility for different services; educate customers, provide travel training

GOWAKE ACCESS

Operations Considerations

Points of Contact

- Primary: Anita Davis, Transportation Program Manager
- Secondary: Nikki Abija, Transportation Planner
- Contractor: See below

Service Notes

- Contracted demand-response service (jointly with GoRaleigh)
  - Medicaid, Resources for Seniors, Elderly Disabled, rural transportation
- Cover all of Wake County, including to Durham and Chapel Hill under Medicaid
- Provide ADA for GoApex
- Have been operating microtransit pilot in northeast Wake County; have funds to continue post pilot
  - https://www.wake.gov/departments-government/health-human-services/programs-assistance/gowake-smartride-ne
- New contractor coming onboard (RATP Dev) to jointly operate with GoRaleigh Access

Location

- Operations: 1430 Blount Street, Raleigh
- Administration: 4401 Bland Road, Raleigh
- Future combined paratransit center (with GoRaleigh Access) will include space for more administrative staff (see GoRaleigh)

Scheduling and Dispatching Software

- Had been using RouteMatch; required new contractor to include own software (Ecolane) – need to further coordinate with GoRaleigh if software to be different

Trip Planner

- None

Other Notes

- County gives some funding to Resources for Seniors and Arc of Triangle, ROAP Elderly and Disabled and 5310 for transporting dialysis and chemo for 65+
- Coordinate closely with Wake County regional centers, centers for volunteer caregiving; senior nutrition sites, senior facilities, CACs - lots of stakeholders spread across different agencies

Goals and Expectations

- Focus on rural transportation challenges; coordinate closely with HARTS, KARTS, JCATS for trips into Wake County
- Establish transfer sites at hub stations and at regional centers
- Want to see more mobility coordination
- Need to ID where it can work and have this be an early task working with the providers
- Work with different operations managers on how to exchange information; work with planners and program managers, set some priorities and see what's possible
- Need to identify projects and more funding with better communication among call centers and drivers to understand how operations work
- Want to see customer service and drivers involved and for training to be improved to improve service delivery to customers
- Need regional coordination and data tracking
- Ensure MM is articulating the challenges and advocating for more resources to be allocated

GOAPEX

Operations Considerations

Points of Contact

- Primary: Katie Schwing, Senior Planner, Long Range Transit, Town of Apex
- Other: Shannon Cox, Long-Range Planning Manager, Town of Apex
- Contractors: See below

Service Notes

Fixed Route

- Route 1 local service began in July 2022
- Service overlaps with GoCary ACX route and GoTriangle Route 305
- Operated thorough service agreement with GoCary (fully loaded hourly fee)

Demand Response

- ADA service under contract with GoWake Access (monthly OH plus hourly fee)
- Limited demand for ADA thus far
- Overlap with GoCary Door to Door Tier 3 service
- GoWake Access provides other rural services for eligible clients
- Some senior living communities have their own shuttles

Location

- See above for contractors
- Administration: 73 Hunter Street, Apex

Scheduling and Dispatching Software

- N/A

Trip Planner

- Website not same as other Go agencies, but link to tracker provided
  https://triangle.transloc.com/

Other Notes

- Senior center has lots of active programming; Apex has a relationship with Resources for Seniors (staff senior center) to help them navigate available services; mostly rely on Wake County for human services programs.
- New department of development and community connections being established; may be a new liaison role
- Work with Western Wake Community Advocacy Committee. W Wake Crisis Ministry - food assistance, financial, advice and resources for navigation; White Oak Foundation, not as large as W Wake, but with a similar mission
- Important for localities to fully understand the funding environment. Apex is a community funding area.
- At least 1x month receive questions about how to get to Durham or CH. Apex is W Wake and there are needs that are unmet

Goals and Expectations

- Overall, very positive about MM, looking forward to having a MM as coordinator to clarify programs that are available
- Not expecting to contribute funds
- Fully expect to participate and support, keep information current, participate in MCC
- Coordination with senior centers should be ongoing
- Interest in travel training
- Make sure reporting and tracking provides feedback to the community.
- Interest in seeing services streamlined when overlaps are present

HARNETT AREA RURAL TRANSIT SYSTEM (HARTS)

Operations Considerations

Points of Contact

- Primary: Barry Blevens, Director of General Services
- Transit Operations: Chance Torain

Service Notes

- Directly operated service
- From website: HARTS provides transportation through subscription routes, Dial-A-Ride, and demand-response service trips. As a paratransit and ridesharing public transportation system, HARTS structures routes and schedules to transport as many different passengers as possible using various fare types and destinations.
- Cannot fully meet demand: service constrained by shortage of drivers; When fully staffed with 27 vehicles went to Raleigh Durham area 5 days week with at least 1 bus; now at 2 days/week
  - Tracking but not reporting denials
- Require reservations at least 2 days prior and ask customers to call 1 day prior to confirm availability.
- Trips into CAMPO region are mostly reimbursed (Medicaid)
- Some interest in new Anger (within CAMPO region) and Fuquay-Varina, if advanced would likely be deviated fixed route.

Location

- Operations and Administration: 250 Alexander Driver, Lillington

Scheduling and Dispatching Software

- CTS Software (Wilmington, NC) – same as JCATS

Other Notes

- Limited other options for transportation in the county
- Some demand for veterans to access services in Durham
- New rider education is important to understand how to reserve (and get) trips

Goals and Expectations

- Very interested in staying involved
- Would like to be able to share resources as applicable

JOHNSTON COUNTY AREA TRANSIT SYSTEM (JCATS)

Operations Considerations

Points of Contact

- Primary: Neal Davis, JCATS Mobility Manager
- Other: Josh Jensen Executive Director of Johnston County Social Services

Service Notes

- Directly operated demand-response service
  - Medicaid and general public, contracts with DSS, aging programs
  - Serve vocational rehab facility and large manufacturing facility in Selma
- Operating microtransit pilot in Selma/Smithfield
  - https://www.cssjohnston.org/quickride
  - Looking for funding to continue if successful
  - Using CTS software (see below)
- $6 each way; same fare as travel within county; $15 out of county

Location

- Operations and Administration: 1050 West Noble Street, Selma

Scheduling and Dispatching Software

- CTS (Wilmington, NC); same as HARTS

Trip Planner

- None

Other Notes

- Neal is developing a mobility management program in Johnston County and will be a great resource
- Trips to other counties the biggest challenge

Goals and Expectations

- Ideally will be able to coordinate with other providers on trips outside county
- Would like to move to a brokerage model where trips are assigned to available provider as appropriate based on capacity
- Would like to see good tracking and reporting on the extent of the need, including unmet trip requests

KERR AREA TRANSPORTATION AUTHORITY (KARTS)

Operations Considerations

Points of Contact

- Primary: Dr. Mary Young, (Interim Executive Director)
- Transportation Coordinator: Alison Pegram

Service Notes

- Directly operated demand-response service in Franklin, Granville, Vance and Warren counties
- Medicaid (about 30%) and rural general public
- Vans to Raleigh, Durham, CH 3 days/week

- Driver shortage limiting capacity (need 15-20 additional drivers)

Location

- 575 Ross Mill Rd, Henderson

Scheduling and Dispatching Software

- RouteMatch (now Trip Spark)

Trip Planner

- None

Other Notes

- Need to re-educate funding partners about purpose of service
- Need assistance with grants
- Want to improve tracking and reporting
- Funding is an issue
- Cannot keep track of rides provided

Goals and Expectations

- To be included in the process and ideally to receive some technical support

APPENDIX C: SUMMARY OF PEER BEST PRACTICES AND STRATEGIES

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APPENDIX D: FRAMEWORK RECOMMENDATIONS EXPLAINED

The excerpts presented below are based on materials prepared for Task 6: Recommended Implementation Framework & Associated Transit Service Impacts.

RECOMMENDATIONS

Organization Structure and Location

Recommendation: The MMP should be centralized within a single agency (CAMPO) and not distributed among providers.

At the regional and local levels, mobility management programs are typically centralized within one agency. Some state programs allocate mobility management funds to transit partners who then use these funds to directly provide mobility management services. This is discussed in the Task 5 Peer Reviews report (see Nashville). Choices regarding which centralized agency include a regional or local transit provider (see Austin and San Francisco), a nonprofit organization (see Denver), or a regional planning agency (e.g., Greater Portland (Portland) Council of Governments).

In the CAMPO region, GoWake Access is the largest rural transit provider and Wake County, which makes up the bulk of the CAMPO study area, could house the MMP. However, the remaining counties in the study area might not wish to participate in a program that is operated by another county. This can be discussed among the TSC.

Given CAMPO's role in regional transportation planning, its connection to the Wake Transit Plan, its current role facilitating the MCC, and its broader focus, the team recommends housing the MMP within CAMPO.

Update: As the joint GoRaleigh/GoWake Access paratransit operations center advances into development, should the mobility manager become increasingly involved in operations, the mobility manager could potentially be housed in the new facility, either as an employee of Wake County or the City of Raleigh.

Governance

Recommendation: The Mobility Coordination Committee (MCC) should serve as the steering committee for the MMP; the MCC's role and function may need to be formalized to provide this support.

As a recommendation of the 2018 Coordinated Public Transit-Human Services Transportation Plan (CPT-HSTP), CAMPO established a Mobility Coordination Committee (MCC). The intent of establishing the MCC was to create the infrastructure and an organization to manage and guide ongoing coordination activities in the urbanized area and to assign this group responsibility for implementing goals and recommendations identified in the CPT-HSTP.

At present, the MCC is organized informally, meaning there are no bylaws or procedures for voting on potential policies. Given the MCC will effectively be overseeing a program that uses federal and potentially local grant funds, the MCC may need to be formalized.

Staffing, Support, and Equipment

Recommendation: Initially, one full-time employee should be hired and provided with office space and equipment, comparable to other CAMPO employees.

It is reasonable to suggest that having more than one person to launch the MMP might enhance its immediate impact. The consultant team recommends beginning with one person initially so as not to overinvest resources prior to demonstrating success. The [strategies and implementation steps] call for the mobility manager to report progress every six months. Should the partner interest indicate additional staffing resources are needed for the program, then the MCC should prepare a request and advocate for more resources or modify the scope of the mobility manager's portfolio.

Funding and Budget

Recommendation: Initial MMP funding should be from FTA Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities) resources. If by the end of the 2nd year the program grows and requires further staffing, additional funds may be needed. Strategies for this program are anticipated to cover a five-year period.

As with many of the regions studied for the best practices task, FTA Section 5310 funding is a commonly used funding source and is eligible as a capital expense, which means that 80% of the annual cost may be federally funded and a 20% local match would be needed. In addition, federal transit funds may be used for program administration, and mobility management is an eligible administrative expense.

STRATEGY FOCUS AREAS

Improving Access to Information

To improve access to transportation information, the mobility manager should:

- Become well versed in the full range of public and private transportation services in the CAMPO region.

- Meet with the individual providers to understand how they organize transportation information, including their outreach activities, customer services, etc. and identify similarities and inconsistencies.

- Organize available information and be prepared to answer inquiries from individuals or organizations seeking transportation services either directly or by making referrals.

- Develop and give presentations on mobility management to local transportation entities such as transportation advisory boards (TABs), CAMPO's TPAC, the MCC, etc. and seek input on what needs can be addressed through the mobility management program.

- Develop and give presentations on mobility management to other government organizations and nonprofit groups and seek input on what needs can be addressed through the mobility management program.

- Use engagement to identify geographic and temporal service gaps across the CAMPO region.

- Document and report progress and findings with input from the MCC. This should include documentation of geographic and temporal service gaps and overlaps.

Managing, Refining, and Advancing the MMP

Once the mobility manager is hired and with input from the MCC, the program will need to be refined and advanced. This will require regular documentation and reporting, analysis of trends, and identification of improvement opportunities. Suggested tasks include:

- Attend all MCC meetings.

- Prepare reports on external meetings attended and outreach activities conducted. Tabulate statistics on user interactions, either through outreach or in response to inquiries.

- Analyze patterns or trends and prepare recommendations on areas of improvement and/or programs requiring additional coordination.

- Develop recommendations for establishing consistency among providers for information referrals including websites and customer service protocols.

- Evaluate the need for a transportation brochure or information clearinghouse such as a one-call/one-click resource.

- Identify regional travel training resources and needs.

- Identify and share public and private grant funding opportunities and support the application process.

- Participate in budget discussions for future mobility management funding.

TRANSIT AGENCY PARTICIPATION CONSIDERATIONS

As part of Task 6, an analysis of potential transit service impacts of the MMP was performed. The following discussion covered policy considerations, staffing, agency websites, client referrals, and general benefits.

Existing Agency Policies and Operating Resources Will Not Be Impacted

- Each transit provider will continue to manage, set policies for, and operate its own fixed-route, complementary paratransit, or demand-response transportation with direction provided by governing bodies, not by the MMP.

- Any future collaboration on transit agency policies for service delivery, fares, ADA, etc. will continue via the Mobility Coordination Committee (MCC).

- Initial funding will come from FTA Section 5310 funds and agency operating funds will not be sought to establish the MMP.

Some Staffing Commitments Would be Needed

- Each provider would be expected to commit limited staff resources to continue to participate in and support the goals and activities of the MCC and to meet with and collaborate with MMP staff. This would likely require more time during startup and less time once the program is established.

Updates to Agency Websites and Customer Service Protocols Will Likely be Required

- To address customers' transportation needs beyond currently published information, each agency as a best practice should look to collaborate with the other agencies to modify their websites and customer service protocols. This may involve adding statements to trip planning webpages such as, "The trip you requested is outside of [agency's] service area. For further information, contact [mobility management website or phone number]."

- Agencies will likely need to revise their procedures for the customer service team to refer appropriate inquiries to MMP staff.

Rider Referrals May Increase

- Through outreach and assistance, the MMP will refer individuals to available transit services. This will likely lead to more customers for transit providers.

- Ideally, MMP referrals will lead to additional fixed-route riders. Transit agencies that provide complementary paratransit could see new applications for ADA paratransit eligibility and may also see more individuals interested in receiving travel training for fixed-route service.

- Microtransit and other demand-response providers can also anticipate more referrals from the MMP.

Agencies Can Expect Benefits from the MMP

- As noted, transit agencies operating fixed-route service will likely see additional bus riders, which is desirable. Additional travel training participation could lead to some complementary paratransit riders using fixed-route service more often.

- Improved websites and clear customer service protocols can reduce call volumes and shorten calls for those seeking assistance that an individual agency may not be able to offer.

- The MMP will coordination activities that include both transit providers and human services agencies.

- Improving mobility, particularly for vulnerable populations, can lead to improved health outcomes, which both helps the individual and the overall healthcare system.

APPENDIX E: SAMPLE COORDINATION BYLAWS

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APPENDIX F: MOBILITY MANAGER JOB DESCRIPTION

INTRODUCTION

The following job description focuses on the position summary, essential duties, and minimum qualifications. It is assumed that the formal job posting will follow CAMPO's other position announcements.

JOB SUMMARY

The CAMPO region's mobility manager will support the implementation, growth, and evolution of a regional mobility management program (MMP), which aims to deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The position involves:

- Engagement, outreach, and coordination activities to offer consistent and easily accessible information on available public transportation services,
- Ongoing data collection, analysis, and reporting to identify trends, clarify needs, and recommend ideas that address the concerns of people who face mobility challenges, and
- Support for efforts to coordinate travel, through stronger collaboration and the potential use of technology.

ESSENTIAL DUTIES

- Collaborate and meet regularly with the region's Mobility Coordination Committee (MCC)
- Collaborate and meet regularly with each transportation provider's designated liaison
- Regularly visit provider operations staff to understand day-to-day operations, primarily for demand-response transportation
- Understand and maintain current information on each provider's fixed-route and demand-response transportation services, including eligibility criteria, service characteristics for inclusion in a centralized sharable database
- Identify other potential agency and organization entities with a potential interest in mobility management

- Create a regional mobility management brand and identity and use for all emails, publicity, and related collateral; conduct follow-up surveys on brand awareness

- Develop collateral materials, content for social media, and other outreach

- Participate in ongoing transportation planning activities such as meetings and events; lead and/or assist with the preparation of the regional Coordinated Public Transit–Human Services Transportation Plan and other coordination activities

- Develop a strategy for serving as a direct contact for transportation referrals, including development of a mobility management webpage

- Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance)

- Become knowledgeable about travel training, local available training resources, and strategies for developing a network of trainers

- Identify opportunities for trip coordination among rural providers

- Conduct outreach to a broader network of agencies, organizations, and individuals involved with or interested in mobility management

- Collaborate with other regional and state agencies

- Maintain records, prepare periodic reports, and give presentations

QUALIFICATIONS

Knowledge, Skills, and Abilities

- Knowledge of public transportation programs and requirements

- Must be well organized and able to multitask

- Ability to perform short- and long-term strategic planning

- Ability to establish and maintain effective working relationships with public transportation agency staff, contracted providers, human services agencies, municipalities, county and state officials, employees, other departments, and the public

- Ability to work effectively with diverse populations

- Ability to communicate effectively in oral and written forms

- Ability to organize information and prepare reports

- Ability to work with Microsoft Office suite and to develop maps and graphics

Desirable Education and Experience

- Bachelor's degree in urban planning, civil engineering, social work, public administration, or related field and 5–8 years or more of related experience
- Substantive knowledge of and interest in related fields such as public transportation, community development, and planning

Conditions of CAMPO Employment:

Requires drug testing and background check (which may include criminal check, education verification, and credit history review) prior to employment.

Requires a valid driver's license with an acceptable driving record.

Physical Requirements

Work in this class is generally sedentary and typically performed indoors. An employee must be able to move throughout facilities freely to perform and/or observe work. An employee must have visual acuity to be able to read and write handwritten and typewritten materials, including being able to view a computer screen. An employee must have the ability to occasionally work safely in and around traffic and active construction sites. An employee in this class must be able to talk and hear to be able to communicate and respond to the public and other employees.

APPENDIX G: MOBILITY MANAGER WORK PROGRAM

ASSUMPTIONS

The draft work program for the mobility manager is based on the following assumptions:

- A full-time professional will be hired as the CAMPO region's mobility manager (MM)

- The MM will be an employee of CAMPO and receive benefits according to CAMPO's employee benefits package

- The MM will follow CAMPO's employee policies, etc.

- The MM will seek, and the region's Mobility Coordination Committee will provide guidance according to a schedule to be determined (e.g., bimonthly)

- For administrative purposes such as reviewing and approving time sheets and expense reports, participating in performance reviews, discussing other matters related to employment, etc., the MM will report directly to a member of CAMPO's planning staff

- Members of the MCC will coordinate with the designated CAMPO supervisor to provide feedback on any matters regarding the MM's performance and job duties

- The mobility management implementation plan will serve as the blueprint for the region's program initially. See Mobility Management Implementation Study (MMIS) Final Report dated June 2023, and in particular Chapters 4, 5, and 6.

JOB SUMMARY

The CAMPO region's mobility manager will support the implementation, growth, and evolution of a regional mobility management program (MMP), which aims to deliver improved public transportation information and services, including travel training, for travel throughout the region, particularly in rural areas. The position involves:

- Engagement, outreach, and coordination activities to offer consistent and easily accessible information on available public transportation services,

- Ongoing data collection, analysis, and reporting to identify trends, clarify needs, and recommend ideas that address the concerns of people who face mobility challenges, and

- Support for efforts to coordinate travel, through stronger collaboration and the potential use of technology.
- Maintain records, prepare periodic reports, and give presentations

ACTION ITEMS FROM TRANSIT PROVIDER INTERVIEWS

The following key themes and associated action items derive from individual interviews with the region's public transportation providers as part of MMIS Task 10 (Participants' Operational Review, Analysis, & Recommendations).

Themes and Actions from Provider Interviews

Theme	Actions
Transportation Information Management See details below	Become familiar with all available services and track any changes in schedules, fares, eligibility, etc.
	Develop, share, and maintain consistent reporting tools.
Regional Trip Coordination and Transfers	Develop consistent forms for tracking regional trips requiring more than one provider and/or not served by any provider.
	Analyze travel patterns and trip routes to identify possible transfer locations.
Trip Planning Resources	Collaborate with GoTriangle and other agencies in any trip planner resource improvements.
	Track and report on other technology improvement strategies as they develop.
Software Compatibility	Become familiar with scheduling and dispatching software used by each provider as well as for microtransit services.
	Track any plans to upgrade/replace software.
Additional Partnerships and Coordination	Periodically coordinate with other regional or state agencies to understand their programs.
	Establish and maintain relationships with municipalities, particularly those considering future transit services.
Travel Training	Identify existing travel training programs in the region, such as those developed by the Alliance of Disability Advocates to learn about program delivery.
	Work with individual providers to identify specific travel training needs.

Information Management Guidance

The following provides additional guidance on managing transportation information, which involves working with the region's public transportation providers, obtain and maintain a centralized database of current information on available public and other transportation options.

Public transportation information includes:

- Fixed routes, schedules, and fares
- Complementary paratransit (ADA) eligibility processes, including application requirements
- Complementary paratransit (ADA) fares, service areas, rider policies, and procedures for requesting trips, including subscription (standing order) trips
- Demand-response services, including service area, schedule, reservations requirements, fares, rider policies, etc. This includes microtransit services.

Other transportation information includes:

- Services provided to groups, residents, organizations, etc., noting any eligibility restrictions
- Non-emergency medical transportation (NEMT) options funded by Medicare, including eligibility requirements and rider policies
    - Note: many of these services are currently provided by the region's public transportation providers
- For-hire transportation options such as shuttles, taxicabs, ride-hailing companies such as Lyft, Uber, etc.
- Other services operating wheelchair accessible vehicles (WAVs)

TIME ALLOCATION

The mobility manager (MM) will need to allocate time for activities that are organized according to the following three goal topics.

1. Engagement, outreach, and coordination
2. Data collection, needs assessment, and program redesign
3. Program evaluation and refinement

The tables on the following pages include estimated time allocations for each strategy in the implementation plan grouped by goal topic. The estimates are for three time periods:

1. Year 1: Months 1–6
2. Year 1: Months 7–12
3. Year 2 and beyond

A few strategies do not have time allocations called out as they would be included in other activities. In addition, some strategies may take more time during certain weeks such as when meetings with the MCC or other boards and committees are scheduled. During these weeks, time adjustments would be needed for other tasks. It is suggested that non-priority tasks are deferred when needed.

Further, it is anticipated that the allocation of time will shift as needs evolve. The MCC should provide ongoing direction for such changes

SUGGESTED ALLOCATION OF TIME FOR MOBILITY MANAGER

Goal Topic: Engagement, Outreach, and Coordination

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Conduct partner outreach, including site visits with providers	40%	30%	15%	Ongoing Activity	▪ Using information obtained during one-on-one provider follow-up conversations, confirm each agency's MMP liaison ▪ Establish a schedule for regular and recurring visits to provider offices and/or contractor facilities ▪ Confirm other potential partners and interested parties and establish schedule for outreach activities ▪ Participate in partner events as appropriate ▪ Also see Public Outreach & Marketing Strategy	▪ Meetings held and events attended ▪ Number of participants (external events) ▪ Comments received on program effectiveness and actions taken
Develop and maintain transportation services information and database	30%	20%	5%	Ongoing Activity	▪ Develop electronic resource (spreadsheet or database) listing all available service characteristics with a focus on demand-response ▪ Coordinate with providers to regularly share information updates ▪ Work with each CAMPO area provider to identify methods for customer interactions regarding available services in the region ▪ Publish information as a downloadable document ▪ Also see Public Outreach & Marketing Strategy	▪ Participating agencies ▪ Number and type of documents distributed and/or downloaded ▪ Frequency and timing of updates
Develop mobility management identity and brand	0%	0%	10%		▪ Create regional MM program brand and identity and use for all emails, publicity, and related collateral ▪ Consider relationship to GoForward to avoid confusion ▪ Conduct follow-up surveys on brand awareness ▪ Also see Public Outreach & Marketing Strategy	▪ Specific resources created and shared using brand ▪ Brand survey results
Develop and eventually publish public-facing materials	0%	10%	10%	Revised as needed	▪ Use brand and identity in all electronic and printed media ▪ Identify translation needs for outreach materials ▪ Develop text and graphics for flyers, posters, and other material, including email formats, etc. ▪ Develop materials tailored to social media ▪ Disseminate printed materials at events ▪ Also see Public Outreach & Marketing Strategy	▪ Materials produced and distributed and/or downloaded

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Conduct targeted outreach	5%	10%	10%	Ongoing activity	▪ Work with providers to identify priority groups for outreach and input ▪ Periodically meet with interested groups ▪ Integrate branded materials when available ▪ Seek feedback annually to inform program improvement or redesign in subsequent years (if needed ▪ Also see Public Outreach & Marketing Strategy	▪ Meetings held and events attended ▪ Number of participants ▪ Feedback received on program effectiveness and recommendations for program modifications
Participate in regional transportation planning coordination	5%	5%	5%	Ongoing activity	▪ Participate in ongoing transportation planning activities such as the forthcoming coordinated plan update (subject to time availability)	▪ Meetings attended ▪ Committees joined ▪ Notes
Design, launch, and maintain mobility management webpage	0%	0%	10%	Ongoing activity	▪ Determine who will host dedicated webpage ▪ Develop content and links ▪ Work with providers to confirm messaging for directing visitors to MM webpage from their provider websites ▪ Also see Public Outreach & Marketing Strategy	▪ Publication of site ▪ Visitors ▪ Document downloads, including directory
Refer riders to transportation options	5%	5%	15%	Ongoing activity	▪ Document all available transportation services and eligibility rules ▪ Work with individual providers to identify best ways to support referral process ▪ Develop communications protocols for describing ways MM program can assist and publish on MM webpage	▪ Agency and organization contacts ▪ Approach to addressing inquiries and tracking requests ▪ Solutions not found
Refer riders to travel training	0%	0%	5%	Scope TBD	▪ Identify past and existing travel training programs in the region, including those by transit providers and those by other agencies, including Alliance of Disability Advocates ▪ Build a network of trainers who can expand to other areas ▪ Possibly directly deliver training in rural areas where needed, but additional resources would likely be required	▪ Training requests ▪ Trainers trained ▪ Training provided
Subtotal	**85%**	**80%**	**85%**			

Goal Topic: Data Collection and Needs Assessment

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Compile data, records of client and agency contacts, and lessons learned				Included in other activities	▪ Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance) ▪ Consider developing a data dashboard for use in meetings with other agencies and sponsors	▪ Trend analyses ▪ Clients served ▪ Agencies participating ▪ Unmet needs (i.e., solutions not available for requests made)
Identify opportunities for trip coordination				Included in other activities	▪ Work with rural providers (HARTS, JCATS, KARTS, GoWake Access) to map common destinations, service schedules, funding programs, etc. ▪ Quantify extent of demand for overlapping service ▪ Document opportunities and constraints for trip sharing including program rules ▪ As applicable, identify locations for potential transfers ▪ Work to identify potential pilot program	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement
Subtotal	**0%**	**0%**	**0%**			

Goal Topic Program Evaluation and Refinement

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Meet regularly with decisionmakers and MCC	10%	10%	5%		▪ Develop electronic forms for tracking consumer requests (e.g., specific trips, travel training, and other assistance) ▪ Consider developing a data dashboard for use in meetings with other agencies and sponsors ▪ See discussion of program refinement strategies in Appendix B	▪ Trend analyses ▪ Clients served ▪ Agencies participating ▪ Unmet needs (i.e., solutions not available for requests made)

Action	Months 1-6	Months 7-12	Year 2+	Comment	Steps	Tracking/Reporting
Use compiled data and records of client and agency contacts to refine program priorities				Included in other activities	▪ Based on data tracking covered in other action items, compile surveys, results of outreach, and other metrics ▪ Produce and disseminate reports every six months ▪ Seek feedback from others and guidance from MCC on program refinements ▪ See discussion of program refinement strategies in Final Plan	▪ Meeting notes with providers ▪ Maps showing potential service overlaps and opportunities, including transfer points ▪ Progress on pilot program advancement
Participate in staff training and development	5%	5%	5%		▪ Allocate time for annual professional development and budget for conference attendance and certification courses ▪ Establish goals for annual professional development ▪ Monitor progress ▪ Once certification obtained, maintain	▪ Conferences attended ▪ Contacts identified ▪ Progress toward certification (credit hours completed ▪ Maintenance of certification
Provide technology assistance and related advocacy	0%	5%	5%		▪ Track adoption of scheduling and dispatching software, microtransit booking applications, and other trip planning tools ▪ Coordinate with GoTriangle (lead agency for regional trip planner) ▪ Participate in ongoing regional transportation technology discussions ▪ Understand how users are learning about services ▪ Advocate for including all demand-response services in technology integration efforts ▪ Identify opportunities for technology integration pilot for potential trip sharing	▪ Document technology challenges raised during outreach and coordination, including meetings attended ▪ Track relevant technology evolution and use
Total	**100%**	**100%**	**100%**			