

# MOBILITY MANAGEMENT

## PERFORMANCE MEASURES (DRAFT)

NOTE: This draft has been provided for informational purposes only. Applicants and Mobility Management and Travel Training programs should still consult with their funders, partners and internal leadership when developing Mobility Management and Travel Training programming and funding requests.

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### SUMMARY

Performance Measures allow programs to determine whether or not their good work and programming has effectively created the change they were hoping to make.

In Oregon and Washington State, there are a wide variety of Mobility Management and Travel Training programs operating in various communities. In 2014, the Area Agency on Coordinated Transportation (ACCT) and Community Transportation Association of the Northwest (CTANW) partnered to create the Mobility Management Committee (MMC) with a goal of determining best practices for Mobility Management work throughout the region.

Initial research found Mobility Management programs operate differently in various parts of the region depending on the size of the area, organization structure and intent of the program. Organizations often have various titles for key and support staff, and in some cases, Mobility Managers have the role of Travel Trainers, and Travel Trainers have the role of Mobility Managers. In other cases, individuals provide the entire spectrum of Mobility Management work within their region or community.

The committee has developed and continues to compile the most common practices and make recommendations for comprehensive Mobility Management programs inclusive of 'Travel Training' or other instruction components for riders. The intended result of this guide is to help programs have easy-to-access strategies for developing their programs, while highlighting performance measures. For example, Travel Training programs indicate a cost-savings feature, while more system-oriented Mobility Management programming require broader, long-term evaluations in order to demonstrate their effectiveness and impact.

This document is based on the work of the committee, and is intended to provide Mobility Management & Travel Training programs with potential strategies for developing their performance measures.

### MOBILITY MANAGEMENT

Mobility Management is broad set of efforts designed to effectively coordinate available modes of transportation, identify needed resources, and promote mobility and

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transportation options to increase self-sufficiency, enable access to resources, jobs, community and government, and promote economic engagement, while enhancing efficiencies in the public, private, and human services transportation industry.

Comprehensive Mobility Management programs utilize a “strategic approach” to “transportation and customer service” (American Public Transportation Association), by employing strategies “that empower people to live independently, and advance health, economic vitality, self-sufficiency and community” (National Center for Mobility Management).

Mobility Management efforts focus on the needs of individuals and families who utilize mobility and transportation options in lieu of or in addition to independently operated vehicles. Ultimately, Mobility Management works to both address the unique needs of individuals while also addressing issues at the organizational, community, and regional scales.

To understand and develop a comprehensive Mobility Management or Travel Training Program, we begin with a “mission” or “purpose” of Mobility Management.

## **MISSION & CORE INDICATORS**

Development of a potential set of shared best practices and performance measures for Mobility Management and Travel Training programming is reliant upon a universal mission for Mobility Management, Travel Training and associated activities. It is important to note this may differ from organization to organization, however, here we use the following mission statement to provide a common framework for Mobility Management and Travel Training Programs.

### **THE MISSION OF MOBILITY MANAGEMENT**

is to ensure all people in a particular region are empowered to reach their desired or necessary destination regardless of age, income, physical or mental ability, use of mobility devices, geographic location, housing or caregiver status.

Core Indicators are designed to help guide answers to the question – How we will know the mission has been accomplished? In addition, identification of Core Indicators helps to establish progress towards the shared mission.

### **CORE INDICATORS – MOBILITY MANAGEMENT**

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| 1. | The region’s physical infrastructure is capable of supporting people of all mobility capacities, including multi-modal transportation options. |
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2.	There are transportation options available to meet the needs of people in the region, including people with supported mobility or specialized transportation needs.
3.	People in the region know about and understand their options.
4.	People in the region know how to and are able to use transportation options that best meet their individual needs and goals.
5.	People in the region do use transportation options that best meet their individual needs and goals.

Bringing together a common framework for Mobility Management and Travel Training programs allows organizations operating in the same or different regions coordinate and collaborate, particularly when considering cross – regional transportation requirements, and enhancing the field of Mobility Management and Travel Training overall.

## **STRATEGIC GOAL DEVELOPMENT**

Strategic Goal Development often begins with a needs assessment to help determine which goals or priorities are most important for an organization to address in their region first. These needs assessments can often be done in conjunction with the local Regional Transportation Planning Organization (RTPO), particularly during their Human Services Transportation Plan (HSTP) process.

Organization’s providing Mobility Management and Travel Training programs can partner with their RTPOs to both advocate for inclusion of goals pertaining to Mobility Management’s Mission, while also obtaining information that can be used to help justify and guide the Mobility Management or Travel Training program’s priorities.

Organizations may also wish to conduct their own needs assessment or survey.

When developing Mobility Management and Travel Training programs, organizations often must choose which issues, opportunities or problems are of the highest priority in their region and align with their own organization’s mission, vision, geographic coverage area and scope of work. While comprehensive regional Mobility Management programs include activities towards each of the Core Indicators, many organizations have limited capacity in terms of resources, programming, human resources and geographic coverage area. Research indicates there are approximately (9) nine common goals addressing needs met through Mobility Management and Travel Training programming:

## COMMON ISSUES, OPPORTUNITIES, OR PROBLEMS TO ADDRESS THROUGH MOBILITY MANAGEMENT & TRAVEL TRAINING PROGRAMMING

Potential Goal	Issue	Core Indicator
Improve the region's physical infrastructure.	<p>The physical infrastructure does not accommodate all modes of transportation, all physical abilities, all mobility devices, or other mobility capacities.</p> <p><b>Example:</b> Many missing sidewalks and/or sidewalks do not include effective ramps or "curb cuts"</p> <p><b>Example:</b> Crossing signals provide inadequate timing for persons with wheelchairs to cross.</p>	1.
Increase availability of transportation options.	<p>The availability of transportation options is not meeting the needs of the region.</p> <p><b>Example:</b> Accessible bus service is available at limited times or not at all.</p> <p><b>Example:</b> There is no transportation to accommodate non-emergency medical transportation for people without Medicaid.</p>	2.
Increase access to transportation options by ensuring available financial resources and removing accessibility barriers for all transportation options.	<p>The transportation services are not completely accessible to people of all ages, incomes, physical and mental abilities, all mobility devices, geographic locations, housing or caregiver statuses.</p> <p><b>Example:</b> Several people in the region have access to their own vehicles, but cannot use them to get to work because they cannot afford gas to begin their employment. A gas voucher program helps to address this issue.</p> <p><b>Example:</b> Bus stops in the area are positioned in a way that prevents people with wheelchairs from accessing services. A grant to rebuild and relocate the area's bus stops helps to address this.</p>	2.
Eliminate transportation as a barrier to accessing basic needs, including health care, government	<p>People have identified transportation as a barrier to accessing basic needs, including health care, government and educational services.</p> <p><b>Example:</b> There is no bus stop at the county clerk's office,</p>	2.

and educational services.	<p>or the bus service does not provide hours similar or in coordination with the local government's operating hours.</p> <p><b>Example:</b> Recent studies have shown more people in the region would keep their medical appointments if they could find coordinated, reliable transportation, particularly transportation providers trained in transport of patients who may have been recently sedated or undergone invasive medical procedures.</p>	
Increase coordination of transportation data, resources and services (such as identification and coordination of potential partners and stakeholders and establishing a shared resource database or website)	<p>There is a lack of effective communication avenues, data sharing and information among transportation services and service providers.</p> <p><b>Example:</b> The social services and government programs in the region are unaware of the transportation options available to their clients because there exists no coordinated information center in the region.</p> <p><b>Example:</b> Mobility Management and Travel Training professionals have difficulty providing up to transportation opportunities to various clients and organizations because there is no centralized data center.</p>	2. 3.
Increase awareness of existing services. Increase voluntary customer knowledge on how to use existing services.	<p>People do not necessarily know about all of the region's transportation options, programs and services.</p> <p><b>Example:</b> Programs like One-Call/One-Click, Ride Share, Technology Apps, Transit, Volunteer Programs, etc. are unknown to the general public due to lack of outreach opportunities.</p>	3.
Increase the use of existing services by pairing individuals and families with transportation options that best meet their needs and mobility capacities.	<p>Existing services are not utilized to their fullest potential.</p> <p><b>Example:</b> The region is fully equipped with a vast network of transportation options, including fully accessible opportunities for people with various mobilities, and economic means. Travel Instruction, Travel Training and Travel Options Counseling-type programming can address this issue so that passengers can choose options that best meet their needs. This programming helps to provide an assessment of the passenger's varying needs, mobility capacity, and options. In addition, this type of programming helps to increase usage of available transportation options, such as fixed route transit, etc.</p>	3.4.5.

Increase customer satisfaction with services.	<p>Customers/Clients are not satisfied with existing transportation services.</p> <p><b>Example:</b> Customers and/or families report providers of transportation are not sensitive or adequately understanding and addressing customer needs. Programs may provide surveys and potential solutions to transportation providers to help improve customer satisfaction.</p>	3.4.5.
Identify, advocate for and leverage opportunities to reduce the cost of providing transportation services.	<p>There are inefficiencies in the cost to provide transportation services that could negatively impact passengers, providers and stakeholders.</p> <p><b>Example:</b> Travel Training programs help reduce the cost of services by increasing ridership on fixed route transit, while increasing use of ADA paratransit options for people who require services.</p> <p><b>Example:</b> Funding contracts prohibit pairing individuals with different funding sources from sharing rides, even if they are going to the same destination. Research and advocacy can address duplication or promote additional efficiencies in the system.</p> <p><b>Example:</b> New technologies may provide ride arrival notifications which results reducing cancellations, no shows or late arrivals. This may also result in greater Customer/Client satisfaction, and increased use of services.</p>	3.4.5.

## DEVELOPING A STRATEGY OR PROGRAM

Once organizations have identified their goals and priority areas, they can develop a set of tasks, roles and responsibilities necessary to accomplish their goals. Research among the existing Mobility Management and Travel Training programs throughout Washington and Oregon found that there are nine (9) common tasks being utilized to effectively implement Mobility Management and Travel Training programming. These include:

- Identification of transportation needs and desires for individuals and communities
- Identification of available modes of transportation and options
- Outreach and education about available options
- Identification and assistance in determining eligibility for options (when applicable)
- Identification of gaps or barriers in services

- Identification of issues in the physical infrastructure impacting mobility
- Development of strategies to address and create awareness about gaps in services, barriers, infrastructure needs and unmet mobility and transportation needs for individuals and the community
- Addressing individual-level barriers by understanding a person's holistic transportation and mobility needs
- Providing hands-on, interactive coaching, counseling or companionship for individuals in order to remove real or perceived barriers to utilizing transportation options

Most commonly in Mobility Management and Travel Training, these tasks can be articulated through one of five programmatic approaches.

<b><u>Approach</u></b>	<b><u>Definition</u></b>	<b><u>Examples</u></b>
Research & Evaluation	A set of activities designed to gather information to understand and/or address an issue, opportunity or problem.	<p><i>Gathering information about missing sidewalks in a particular city.</i></p> <p><i>Gathering information about available transportation options in a particular state.</i></p>
Service Coordination	A set of activities designed to bring together services in order to leverage them towards a specified goal at a systemic level.	<p><i>Hosting a monthly coalition of transportation-minded providers and social service organizations.</i></p> <p><i>Building a database of available transportation options to be used to provide clients of the local transportation broker.</i></p>
Individualized Services	A set of activities delivering training, education, information, resources or services designed to enhance the quality of life for particular individuals.	<p><i>Providing hands-on instruction for passengers interested in using fixed-route bus services.</i></p> <p><i>Providing an assessment and summary of available and needs-based transportation options to a client and his/her</i></p>

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		<p><i>family.</i></p> <p><i>Implementing a travel instruction program that teaches social service workers how to become “ambassadors” for their clients in using the transportation system.</i></p>
Outreach (Education)	A set of activities designed to increase knowledge about a designated topic among a set of targeted populations.	<p><i>Providing a PowerPoint presentation about available Transportation Options at the local Senior Services Center.</i></p>
Advocacy	A set of activities designed to educate decision-makers about policies, issues or opportunities, with a goal to achieve a desired “action” by decision makers or people in particular positions.	<p><i>Educating bus drivers about the experience of passengers in order to promote a better customer/client experience.</i></p> <p><i>Educating City Council about the need for sidewalks in certain areas in order to achieve increased sidewalks or bike paths in a particular region.</i></p>



## ARTICULATING PERFORMANCE MEASURES

Performance Measures provide an outline for programmatic needs and resources, as well as programmatic outputs and outcomes. They help answer questions, such as: What are the activities associated with the program and how much will they cost? Or, what is the desired or estimated outcome of the program's activities? They typically include the objectives, outcomes and evaluations. It is typical for performance measures to be developed in a workplan or logic model format:

<b>Mission:</b> Articulating Needs (Issue, Opportunities or Problems to Address):					
Goal	Program	Objective(s)	Budget	Outcome	Evaluation

An example might appear as follows:

<p>The <b>Mission of Mobility Management</b> is to empower all people to reach their destinations of choice or necessity without regard to age, income, ability or geographic location.</p> <p>This Mobility Management program will address two issues that have been identified as <b>the top priorities/community need</b>:</p> <ul style="list-style-type: none"> <li>HSTP has identified lack of knowledge of transportation resources impacts access to social services and health care. Patients said 80% of missed appointments were due to transportation barriers.</li> <li>City Council has reported that evidence suggests the public is not aware of all of their options.</li> </ul>					
Goal	Strategy (What programming will best meet the need?)	Objectives (X) (Implement X to establish Y) = Workplan	Budget	Outcome (Y)	Evaluation (This problem existed before we did X. We did X. We want to show the problem has been addressed or the situation has been improved)
Increase access to social services and health care by reducing barriers to transportation.	Service Coordination (Coalition)  Travel Training  Individualized Services	MM will Identify 20 social service and health care organizations by Oct. 15 <sup>th</sup> .  MM will form coalition and host 2 coalition meetings each year.  Travel Training for 300 social service and hospital workers by January 18 <sup>th</sup> .  Provide individualized travel training, gas vouchers or travel options counseling to 80% of referrals by end of grant cycle. .	Staff: \$50,000 Supplies: \$10,000 Travel: \$1,000 Administrative: \$6,100	Reduced transportation-related missed appointments at social service and health care agencies by 20% in the second year.  <b>Next Grant Cycle: Maintain transportation-related missed appointments at 10% or below.</b>	Coalition will create follow up survey to be implemented at social service agencies and health care organizations to assess passenger reports of reasons for missed appointments.  Survey will measure effectiveness of program by assessing:  # of transportation-related missed appointments before and after.  The role Travel Training for Social Service and Hospital Workers played in reduced missed appointments.  The role Individualized Services in reduced missed appointments. .

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For ease of presentation and submission of funding requests, it can be helpful to put the information into a program description. An example might include:

## **MOBILITY MANAGEMENT PROGRAM X**

INTRODUCTION: The mission of Mobility Management is to ensure all people in a particular region are empowered to reach their desired or necessary destination regardless of age, income, physical or mental ability, use of mobility devices, geographic location, housing or caregiver status. Core indicators of a comprehensive transportation system include: The region's physical infrastructure is capable of supporting people of all mobility capacities, including multi-modal transportation options; There are transportation options available to meet the needs of people in the region, including people with supported mobility or specialized transportation needs; People in the region know about and understand their options; People in the region know how to and are able to use transportation options that best meet their individual needs and goals; People in the region do use transportation options that best meet their individual needs and goals.

In 2016, the Human Services Transportation Plan (HSTP) identified lack of knowledge of transportation resources has negatively impacted access to social services and health care. 500 appointments are missed each month, leaving individuals and families in the community without access to basic health care treatment or essential social services, such as food assistance, housing vouchers, and employment opportunities. In addition, a 2015 citywide survey conducted by City Council identified the public's lack of knowledge in awareness of existing services is the number one barrier to community accessibility.

GOALS & STRATEGIES: The goal of our programming is to increase access to social services and health care, utilizing Service Coordination (Coalition Building), Travel Training and Individualized Services.

PERFORMANCE MEASURES & EVALUATION: At the end of the grant cycle, our efforts are estimated to reduce transportation-related missed appointments at social service and health care agencies by 20% in the second year. In addition, we believe these efforts will lay a foundation to maintain transportation-related missed appointments at 10% or below in years three through ten of this work. Our proposal outlines ten (10) objectives for completion during the grant cycle, including:

- The Mobility Manager will identify 20 social service and health care organizations by Oct 15<sup>th</sup>.
- The Mobility Manager will form a coalition and host two coalition meetings each year.
- The Mobility Manager will provide travel training to 300 social service and hospital staff by the end of the grant cycle.
- Etc.

To evaluate the program, the coalition will create follow up survey to be implemented at social service agencies and health care organizations to assess client reports of reasons for missed appointments. The survey will measure effectiveness of the program by assessing the number of transportation-related missed appointments before and after program implementation; the role Travel Training for Social Service and Hospital Workers played in reduced missed appointments; and the role of Individualized Services in reduced missed appointments. The completed project report will include a comprehensive outline of the completed work plan objectives, along with the

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survey results and additional lessons learned.

BUDGET Our budget for this program includes hiring one .25 FTE upon notification of grant award. The total budget is \$73,700.00 for the two year grant period, and is broken down as follows.

- Staff (including fringe) = \$50,000
- Supplies = \$15,000
- Travel and Lodging = \$1,000
- Printing & Reproduction = \$1,000
- Administrative Overhead (10%) = \$6,700

SUMMARY Our organization has been serving the region since 1978. We have more than 35 years of experience in providing high quality, excellent service to the people of our region. We believe this program strategy will help to improve the lives of people in our community by eliminating transportation as a barrier to receiving health care and social services. Moreover, we believe our commitment to strong, lasting partnerships will lay a solid foundation for continued efforts towards long-term community improvement.

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## HINTS FOR DEVELOPING PERFORMANCE MEASURES

- Whenever possible, reiterate the **mission** of Mobility Management Programming (and **Core Indicators** if room). Summarize or bullet point the 3-5 main issues (**needs**) that will be addressed and who identified them. This allows you build a good foundation for your program and what will be measured.
- The **goal is short, and describes what you hope to accomplish**. Please refer to the Mobility Management and Travel Training Common Goals for assistance. Rephrasing goals to demonstrate how they meet the need is important, I.E. Determine whether saying “increase access to A” or “reduce barriers to B” is more effective.
- Sample **program strategies** can be found in this guide. These are basic frameworks for how you plan to reach your goal, I.E. Education/Outreach, Service Coordination or Individualized Services.
- Workplan **objectives** articulate the work that is to be done in order to reach the goal. These are generally expressed as **Objective = Action/Activity + Number + Date (+Who)**. Objectives outline expectations with numerical qualifications, timeline for completion, and the person responsible for completing the tasks, I.E., the Mobility Manager will identify twenty partner organizations and host two coalition meetings by October 10<sup>th</sup>.
- The **budget** articulates resources needed to complete the activities associated with the program which are generally outlined in the objectives. How much will each of these activities cost? Or is there is singular budget to achieve the entire goal? If seeking funding, be sure to consult grant guidelines for applicable expenses.

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- The **outcome** is the estimated result of meeting your goal and completing your objectives. Return to the need(s) and goal(s) to help guide this process. *Need:* The HSTP states a primary concern is from hospitals reporting a decline in patient health due to missed appointments. Patients identified transportation as the primary reason for not keeping their appointments. *Goal:* Increase access to health care and social services; or Remove transportation as a barrier to accessing health care and social services. In developing the outcome(s), it should be noted the needs existed before your program implemented its objectives. What will happen as a result of your activities? The **outcome** is the **result** of your activities. I.E. Reduce missed appointments in social service agencies by 20% over the next two years. Remember, Mobility Management programs are often long term projects. It is okay to speculate the continued outcomes of your programming, especially when you are submitting for short-term funding. I.E., Reduce missed appointments in social service agencies by 20% during this grant cycle. Reduce missed appointments by 40% over the next ten years.
  - The **evaluation** explains how you will know the outcome was achieved, and demonstrate how the activities (objectives) played a role in accomplishing the outcome. Evaluation methods often include reporting on the completion of the objectives. However, evaluating the outcome is essential. Many times, utilization of “before and after” surveys are integral to evaluation. I.E. We will utilize initial reports from social service agencies and hospitals that identified most missed appointments were due to transportation barriers. At the end of the grant cycle, we will conduct a follow up survey that determines the new number of missed appointments due to transportation barriers. In addition, our survey will include markers to determine what role our activities played in barrier reduction.

#### **ADDITIONAL HINTS FOR GRANT OPPORTUNITIES IN WASHINGTON STATE**

- When developing a grant proposal, have it reviewed by someone unfamiliar with your program or Mobility Management and Travel Training. This will help ensure you have articulated your program and performance measures in way that can be easily understood.
- Connect with your Community Liaison through the Washington State Department of Transportation. They are available for questions any time before and throughout the grant process.
- Connect with your Regional Transportation Planning Organization (RTPO) well in advance to ensure you understand the needs articulated in the Human Services Transportation Plan. Your RTPO can also provide you with information regarding regional ranking priorities.
- [WSDOT Consolidated Grants](#) | [Example Weighted Criteria](#) | [Example RTPO Ranking VS. WSDOT Application Processes](#)

#### **NOTES**

For more information about the WSDOT consolidated grants process, please contact your RTPO and/or Community Liaison.

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## **ACKNOWLEDGEMENTS**

Thank you to the CTANW Mobility Management Committee for their efforts in developing the Mobility Management and Travel Training Best Practices Guide. The information contained in this Draft is derived from the work of the Mobility Management Committee. This Performance Measures Draft is still under review. Feedback on this material may be submitted to [info@ctanw.org](mailto:info@ctanw.org).

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**END**