



TO: RTCC Members  
CC:  
FROM: Stevie Greathouse  
SUBJECT: Additional Input Regarding Goals and Performance Measures (February Agenda Items 2 and 3)  
DATE: February 7, 2011

After the RTCC Executive Committee completed its work on development of draft Goals, Objectives and Performance Measures, I received two technical memorandums on the topic of Goals and Performance Measures from our planning consultant. I am forwarding these documents to the RTCC, so that you have them as you review the language recommended by the Executive Committee under Agenda Items 2 and 3.

#### **Suggested Modifications to Goals and Objectives**

Based on my review of the attached technical memoranda, I would suggest several minor modifications to the goals and objectives prepared by the RTCC Executive Committee:

- **Modify recommended Goal 1 to read:** Preserve and expand transportation services for the public and human services clients, especially those services that meet the critical needs of the transportation disadvantaged.
- **Modify recommended Goal 2 to read:** Maintain and improve the quality and safety of transportation services for the public.
- **Add objective 2.5 which reads:** 2.5 Identify problem areas and improve bus stop and pathway accessibility and safety.
- **Modify recommended Goal 3 to read:** Secure formal state and local agency agreements and identify and address funding, regulatory, programmatic, attitudinal, and geographic barriers to implement coordinated transportation in the Capital Area.
- **Modify Goal 4 to read:** Increase the efficiency of transportation services for the public and human service clients.
- **Modify Objective 5.4 to read:** Create a user-friendly, single-entry phone and website access for trip planning, eligibility, and reservations passenger information.

#### **Performance Measurement**

The performance scorecard recommended by the Executive Committee is geared toward using available data to annually measure performance of the overall system. The consultant's technical memorandum on performance measurement includes a lot of good information on how to evaluate the performance of particular strategies and programs. As we identify implementation strategies through our planning process, we may want to look at developing some more fine-grained measures that can evaluate the performance of specific strategies.

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## Update to Capital Area Coordinated Public Transit-Health and Human Services Transportation Plan

### *Technical Memorandum 1 Coordinated Transportation Plan Update - Vision and Goals*

February, 2011

*Prepared for the:*

**Capital Area Metropolitan Planning Organization**

# Technical Memorandum No. 1: Coordinated Transportation Plan Update - Vision and Goals

The first steps in development of the updated Regional Coordinated Transportation Plan include addressing the vision, goals, and objectives of the planning process. This technical memorandum is the starting point for an update of these key aspects of the planning process that will provide direction for the rest of the project, and ultimately the implementation process.

The goals were first established in 2006 as part of the Regional Transportation Coordination Plan prepared by the Capital Area Regional Transit Coordination Committee (RTCC), and are now being revisited in acknowledgement that some goals and/or objectives:

- have been completed,
- are no longer relevant, or
- are in need of a revision/update.

Based on these factors, this memorandum describes an updated vision as well as goals and objectives for RTCC consideration. As a starting point, the RTCC should discuss the vision statements, goals, and objectives, and comment as appropriate.

## VISION STATEMENT

According to the 2006 Coordinated Plan, at the direction of the Texas Transportation Commission (TTC), transportation stakeholders in the RTCC were tasked with the following:

*Develop a plan for a seamless transportation system that promotes efficiencies, eliminates duplication, increases coordination, and addresses service gaps.*

Four years later, the RTCC has requested that this update of the plan focus on the development and implementation of strategies and projects that will be implemented, with the overarching vision:

*Develop a plan that will address service gaps and lead to more transportation service and mobility for all residents of the service area through innovative approaches, reduction of duplication/greater coordination and efficiencies in service.*

This vision statement is presented as a starting point for the RTCC. It emphasizes implementable solutions to eliminating service gaps and providing more and better service to the residents of the ten county service area. It also highlights the importance of the coordinated planning process transitioning from one that offers a broad overview of possible coordination opportunities to one that provides specific projects and services to improve mobility in the region.

## GOALS AND OBJECTIVES

The initial project goals and objectives adopted for the 2006 Regional Transportation Coordination Plan for the Capital Area are presented in Table 1-1.

**Table 1-1: Adopted Project Goals and Objectives from the 2006 Regional Transportation Coordination Plan for the Capital Area**

<i>Goals</i>	<i>Objectives</i>
<b>Goal 1: Preserve and expand transportation services for the public, especially those services that meet the critical needs of the transportation disadvantaged.</b>	<p><i>Objective 1.1.</i> Evaluate if coordination among agencies and providers results in a better level of service for existing clients or provides additional services to serve currently unmet transportation needs.</p> <p><i>Objective 1.2.</i> Identify the additional transportation resources made available through coordination and a method of utilizing those resources for reservation and expansion of transportation services.</p> <p><i>Objective 1.3.</i> Annually evaluate and prioritize transportation coordination opportunities.</p>
<b>Goal 2: Maintain and improve the quality of transportation services for the public.</b>	<p><i>Objective 2.1.</i> Identify, adopt, and implement measurement of common performance indicators for a coordinated public transit system.</p> <p><i>Objective 2.2.</i> Propose, implement, and evaluate demonstration projects based on the performance indicators.</p> <p><i>Objective 2.3.</i> Identify, adopt, and implement minimum training, vehicle, service, operator, privacy, and other safety standards and policies for participants in the coordinated public transit system.</p>

<i>Goals</i>	<i>Objectives</i>
	<p><i>Objective 2.4.</i> Identify and provide annual training opportunities for participants in the coordinated public transit system.</p> <p><i>Objective 2.5.</i> Standardize a feedback process to monitor and improve the performance of the coordinated public transit system on an on-going basis; and prepare an annual report on the state of the coordinated system.</p>
<p><b>Goal 3: Secure formal state and local agency agreements to implement coordinated transportation in the Capital Area.</b></p>	<p><i>Objective 3.1.</i> Adopt the Recommended Regional Transit Coordination Plan.</p> <p><i>Objective 3.2.</i> Establish formal written agreements among participating agencies and programs outlining the decision-making process for implementing a coordinated system.</p> <p><i>Objective 3.3.</i> Secure the resources necessary to implement coordinated transportation services in the Capital Area region.</p> <p><i>Objective 3.4.</i> Adopt inter-local, interagency agreements on cost sharing, funding mechanisms, and arrangements for vehicle sharing.</p>
<p><b>Goal 4: Reduce the duplication of transportation services for the public.</b></p>	<p><i>Objective 4.1.</i> Identify and quantify real or potential savings gained from grouping trips funded by two or more agencies or programs.</p> <p><i>Objective 4.2.</i> Identify operational and business functions of services that can be combined across agencies</p>
<p><b>Goal 5: Increase efficiencies in transportation support services for the public.</b></p>	<p><i>Objective 5.1.</i> Identify and coordinate maintenance and facility services among agencies.</p> <p><i>Objective 5.2.</i> Identify and reduce duplication in administrative services and reporting requirements.</p> <p><i>Objective 5.3.</i> Develop a mechanism of regular communications between agencies.</p>
<p><b>Goal 6: Increase public awareness of mobility options and improve access to transportation services for the public.</b></p>	<p><i>Objective 6.1.</i> Develop and implement a multi-agency marketing plan that advertises the availability of coordinated public transit services.</p> <p><i>Objective 6.2.</i> Provide information and gather feedback on transportation coordination activities on a regular basis.</p> <p><i>Objective 6.3.</i> Provide targeted training and information materials about available transportation services.</p> <p><i>Objective 6.4.</i> Create a user-friendly, single-entry phone and website access for trip planning, eligibility, and reservations.</p>
<p><b>Goal 7: Address funding, regulatory, programmatic, and geographic barriers to provide seamless transportation services for the public.</b></p>	<p><i>Objective 7.1.</i> Adopt legislative and regulatory changes that remove regulatory barriers and support coordinated public transit services.</p> <p><i>Objective 7.2.</i> Develop a consistent cost allocation model and formulas for funding grouped trips that are fair and cost-effective.</p>

<i>Goals</i>	<i>Objectives</i>
<p><b>Goal 8: Further the state's efforts to reduce air pollution.</b></p>	<p><i>Objective 8.1.</i> Reduce vehicle-miles of travel through the consolidation of trips.  <i>Objective 8.2.</i> Support the state's efforts to purchase more efficient transit equipment and fuels to improve transit vehicle emission characteristics.  <i>Objective 8.3.</i> Promote the use of more efficient technologies through the consolidation of resources.  <i>Objective 8.4.</i> Reduce congestion by reducing the number of transit vehicles in service while carrying the same or greater number of person</p>

Based on interviews, meetings, review, and examination of pertinent documents, and other activities undertaken at the outset of the updated planning process, the proposed updated goals and objectives follow below. These have been modified to address the needs voiced in the interview and meeting process. Table 1-2 reviews the two sets of goals (2006 and proposed 2011) and reviews the changes.

The suggested changes to the goals take into consideration the needs of persons with disabilities as initially discussed in the 2006 plan and detailed below:

1. Proposed changes in transportation services include greater availability, accessibility, and affordability of transportation services for all Texans, including individuals with disabilities;
2. Transportation programs demonstrate full compliance with standards of accessibility for people with disabilities; and
3. Provide multiple opportunities for public input and participation of all Texans, including people with disabilities, in the planning process.

**Table 1-2: Comparison of 2006 and Proposed 2011 Goals**

2006 Goals	Proposed Goals	Proposed Changes
1. Preserve and expand transportation services for the public, especially those services that meet the critical needs of the transportation disadvantaged.	1. Preserve and expand transportation services for the public and human service clients, especially those services that meet the critical needs of the transportation disadvantaged.	Added human service clients
2. Maintain and improve the quality of transportation services for the public	2. Maintain and improve the quality and safety of transportation services for the public.	Added Safety
3. Secure formal state and local agency agreements to implement coordinated transportation in the Capital Area.	3. Secure funding for new coordination efforts in the Capital Area.	Change from secure formal agreements to secure funding
4. Reduce the duplication of transportation services to the public	4. Reduce the duplication of transportation services for the public and human service agencies.	Added human service
5. Increase efficiencies in transportation support services for the public.	5. Increase efficiencies in transportation support services for the public.	No Change
6. Increase public awareness of mobility options and improve access to transportation services for the public.	6. Increase public and organizational awareness of mobility options and improve access to transportation services for the public	Added organizational awareness
7. Address funding, regulatory, programmatic, and geographic barriers to providing seamless transportation services for the public.	7. Address funding, regulatory, programmatic, attitudinal and geographic barriers and opportunities to providing seamless transportation services for the public.	Added attitudinal barriers
8. Further the state's efforts to reduce air pollution.	8. Further the state's efforts to reduce air pollution.	No Change

**Goal 1: Preserve and expand transportation services for the public and human service clients, especially those services that meet the critical needs of the transportation disadvantaged.**

- *Objective 1.1.* Identify gaps in the service area (areas unserved or underserved, user groups, specific needs, and origins/destinations) and develop strategies that will result in elimination of the gaps.
- *Objective 1.2.* Identify those areas where coordination opportunities may be beneficial for customers and/or transportation programs and develop strategies to further coordinate.
- *Objective 1.3.* Continue to identify opportunities for a seamless network of transportation services throughout the region.
- *Objective 1.4.* Annually evaluate existing projects and prioritize transportation coordination opportunities for the future.
- *Objective 1.5.* Develop a mobility management program to support the coordination and planning efforts, generate revenue, and work closely with all stakeholders.
- *Objective 1.6.* Identify additional planning activities and efforts needed beyond the coordinated transportation planning process.
- *Objective 1.7.* Develop process or structure that links human service studies and reports to the coordinated planning process.

**Goal 2: Maintain and improve the quality and safety of transportation services for the public.**

- *Objective 2.1.* Identify, adopt, and implement measurement of common quality and safety indicators for a coordinated public transit system.
- *Objective 2.2.* Propose, implement, and evaluate demonstration projects based on the quality and safety indicators.
- *Objective 2.3.* Identify, adopt, and implement coordination efforts in the areas of training, vehicle maintenance, service operation, and other safety standards and policies for participants in the coordinated public transit system.

- **Objective 2.4.** Standardize a feedback process to monitor and improve the performance of the coordinated public transit/human service transportation system on an on-going basis; and prepare an annual report on the state of the coordinated system.
- **Objective 2.5.** Develop communication and share planning activities with other sectors of the human service and medical communities and housing organizations, developers, and others as appropriate.
- **Objective 2.6.** Seek to identify problem areas and improve bus stop and pathway accessibility and safety.

**Goal 3: Secure funding for new coordination efforts in the Capital Area.**

- **Objective 3.1.** Implement a mobility manager program to among other things, seek out and secure new funding sources.
- **Objective 3.2.** Secure the resources necessary to implement coordinated transportation services in the Capital Area region.
- **Objective 3.3.** Establish formal written agreements among participating agencies and programs outlining the decision-making process for implementing a coordinated system.
- **Objective 3.4.** Adopt inter-local and/or interagency agreements on cost sharing, funding mechanisms, and arrangements for vehicle sharing.

**Goal 4: Reduce the duplication of transportation services for the public and human service agencies.**

- **Objective 4.1.** Identify where reduction of duplication can result in improvements.
- **Objective 4.2.** Identify operational and business functions of services that can be combined across agencies.
- **Objective 4.3.** Where possible, coordinate volunteer programs recognizing the delicate nature of the use of volunteers.

**Goal 5: Increase efficiencies in transportation support services for the public.**

- **Objective 5.1.** Identify and coordinate maintenance and facility services among agencies.

- *Objective 5.2.* Identify and reduce duplication in administrative services and reporting requirements.
- *Objective 5.3.* Develop a mechanism of regular communications between agencies.

**Goal 6: Increase public and organizational awareness of mobility options and improve access to transportation services for the public.**

- *Objective 6.1.* Develop and implement a marketing plan that targets human service agencies and public transit riders, promoting the availability of coordinated public transit services.
- *Objective 6.2.* Develop a brochure targeting medical and human service facilities on locating their facility to ensure availability of transit.
- *Objective 6.3.* Provide targeted training and information materials about available transportation services.
- *Objective 6.4.* Provide a user friendly web site and telephone system for passenger information.

**Goal 7: Identify funding, regulatory, programmatic, attitudinal and geographic barriers and opportunities to providing seamless transportation services for the public.**

- *Objective 7.1.* Adopt legislative and regulatory changes that remove regulatory barriers and support coordinated public transit services.
- *Objective 7.2.* Develop a consistent cost allocation model and formulas for funding grouped trips that are fair and cost-effective.
- *Objective 7.3:* Develop a process for educating decision-makers regarding the transit needs of the region, coordinated planning process and for highlighting successful efforts to provide expand mobility options and to provide more efficient and cost effective transportation services.

**Goal 8: Further the state's efforts to reduce air pollution.**

- *Objective 8.1.* Reduce vehicle-miles of travel through the consolidation of trips.

- **Objective 8.2.** Support the state's efforts to purchase more efficient transit equipment and fuels to improve transit vehicle emission characteristics.
- **Objective 8.3.** Promote the use of more efficient technologies through the consolidation of resources.
- **Objective 8.4.** Reduce congestion by reducing the number of transit vehicles in service while carrying the same or greater number of person

## **NEXT STEPS**

These proposed updated vision, goals, and objectives are presented as a starting point for review and discussion by the RTCC. It is anticipated the RTCC will have suggestions and comments based on needs, issues and experiences. Once the committee has reviewed and commented, changes will be made as appropriate to provide a final vision and goals/objectives that will provide direction for the remainder of the coordinated planning process.

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## Update to Capital Area Coordinated Public Transit-Health and Human Services Transportation Plan

### *Technical Memorandum 2 Development of Performance Measures for Coordinated Transit Services*

February, 2011

*Prepared for the:*

**Capital Area Metropolitan Planning Organization**

## Technical Memorandum No. 2: Development of Performance Measures for Coordinated Transit Services

This technical memorandum initiates the discussion regarding the performance measurement of strategies and projects emanating from the coordinated transportation planning effort. Performance measurement is an important component of transportation programs and particularly a demonstration program, providing an assessment of the program's operation and its effectiveness in meeting its stated goals. Performance measurement also supplies important information that can be used to inform and educate community partners and stakeholders on the progress of the program. Evaluation of a demonstration program additionally serves to assess the potential for transitioning the program from pilot to permanent, ongoing status.

The setting of goals and objectives (in Technical Memorandum No. 1) was the first step in guiding the process. The second step is to identify the different types of quantitative and qualitative performance measures followed by setting of specific measures for each of the strategies to be developed.

Performance measures should be both quantitative and qualitative in nature. Therefore, operating data such as trips provided, as well as input from users and operators, should be components of the evaluation process. These various techniques to measure performance are outlined in this report. It should be pointed out that while this memorandum discusses performance measurement concepts and the types of measures based on the project goals, specific measures attached to strategies will be discussed when reviewing strategies in a subsequent memorandum.

Transportation Cooperative Research Program (TCRP) Report No. 124 *Guidebook for Measuring, Assessing, and Improving Performance of Demand-Response Transportation* and its rural companion report TCRP Report No. 136 *Guidebook for Rural Demand-Response Transportation: Measuring, Assessing, and Improving Performance* are used throughout this memorandum as reference points for operational performance measures.

## BASIC CONCEPTS – SETTING PERFORMANCE MEASURES

There are a number of basic concepts that will be used in the setting of performance measures. These include:

- Aligning the performance measures to the established vision, goals and objectives;
- Aligning the performance measures to strategies identified through the coordinated planning process;
- Keeping the performance measures simple and using a small number of measures. For example, TCRP Reports Nos. 124 and 136 recommend between five and six measures for rural and urban paratransit;
- Measuring both:
  - Efficiency of services – “doing the right things”
  - Effectiveness of services – “doing things right”
- Ensuring each measure has a stated purpose;
- Recognizing that data collection and analysis is expensive and time consuming;
- Measuring performance using as few indicators as needed. If it is not a problem, measure it on a sample basis as needed.

## QUANTITATIVE DATA

All public transit systems that receive funds or benefit from the Federal Transit Administration’s (FTA) Urbanized Area Funding Program (Section 5307) or the rural transit program (Section 5311) are required to file an annual National Transportation Database (NTD) report. The data required for this report are defined in the annual NTD reporting manual for all transit modes. (The annual Reporting Manual is published each year and is available on the NTD website at [www.ntdprogram.gov](http://www.ntdprogram.gov) ). When feasible, quantitative data should be based on the NTD terms and definitions.

Following are transit specific performance measures that can be applied to operational strategies. Each of these performance measures evaluate different aspects of a service as noted:

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- Passenger Trips per Vehicle Hour or Vehicle Mile – These are key measures of productivity.
- Operating Cost per Vehicle Hour or Vehicle Mile – These measures determine the basic cost of providing service.
- Operating Cost per Passenger Trip – This measure is a reflection of the cost per hour and the system productivity. The higher the productivity, the lower the cost per trip.
- Safety Incidents per 100,000 Vehicle-Miles – A basic measure of safety.
- On-Time Performance – A measure for determining the quality of service being provided.
- Annual One-Way Trips per Capita – This measure helps depict the impact of the service in the community.

Quantitative data related to non-operational strategies are not always applicable, however in many cases numbers can be used to measure success. For example, where a strategy may include developing a brochure to guide medical facilities in locating at or near a bus route, a quantitative measure can include: number of brochures distributed to the medical and human service communities. In addition, an outreach strategy that involves a mobility manager approach may include quantitative data on the number of phone contacts, the number of website hits, or the number of people who received travel training.

## QUALITATIVE DATA

The Capital Area Regional Transit Coordination Committee (RTCC) should also collect qualitative data about the program on a periodic basis, obtaining feedback from users as well as from agencies and operators. This information will help assess the degree to which the project or demonstration program is meeting its goals. Qualitative data may also:

- Suggest revisions and improvements to the program.
- Help assess the impact of a strategy on the community, going beyond just the data and numbers.

- Provide information that can be used to report broader outcomes to elected officials, funding partners, and other key community stakeholders, and help to educate them on the importance and the overall benefits of coordinated transportation.

When obtaining and assessing the qualitative data, in general the following should be considered:

- **User Benefits** – Direct benefits to users from increased access to services and activities (i.e. medical services, employment, education facilities, shopping).
- **Economic Benefits** – Economic impact of expanding access to jobs shopping, and other community locations, as well as the expanded business opportunities for taxi providers.
- **Public Service Support** – Support for government agency activities and programs by allowing access to medical services to avoid more acute and expensive medical problems, helping reduce welfare dependency and unemployment, and providing ability to live independently and reduce care facility costs.
- **Equity Benefits** – Increased economic and social opportunities for people who may be economically, physically and socially disadvantaged
- **Option Value** – Value people place on having a service available, even if they do not currently use it, i.e. during emergencies or when a family member suddenly can no longer drive.

## PROGRAM INTERVIEWS

A possible technique for gathering both quantitative and qualitative information is to conduct interviews with projects, particularly with the variety of community transportation programs that are funded through the Job Access and Reverse Commute (JARC) and New Freedom Programs. These interviews can be conducted in person or over the phone, and can provide a wide range of information that can be used to evaluate services that are originating from the coordinated transportation planning process. An example of a form that can guide the interview process is located in Appendix A. This form is designed for an interview of a New Freedom-funded project, but can easily be modified for projects funded through other programs or to gain information on specific types of services such as a mobility management effort.

The information and data obtained through the interview process can be used

beyond the evaluation process. For instance, it can be used for peer-sharing efforts with other projects in the area, and to help identify opportunities for additional supports or trainings that may be needed to ensure the success of the project.

## USER FEEDBACK

Participants should have opportunities to give feedback and input on the program. There are several options available, and this input can be obtained in through different techniques:

A short user survey could be posted on the website of the administrator of the program. This would be a very straightforward survey asking basic questions about the user's trips and specific questions about the most recent trip taken. The survey would also ask for input on key aspects of the program, with questions such as:

- Thinking about your most recent trip, please rate each of the following:
  - Timeliness of arrival for your pick-up:
    - Good
    - Satisfactory
    - Needs improvement
  - Driver courtesy:
    - Good
    - Satisfactory
    - Needs improvement
  - Was the vehicle clean and in good working condition?
    - Good
    - Satisfactory
    - Needs improvement
  - Overall rating of the trip
    - Good
    - Satisfactory
    - Needs improvement

A written survey could also be administered to users of the program as a mail-out, mail-back instrument. To increase the response rate, return postage could be provided. This would allow users who do not have computers to provide feedback. Such a survey might be done six to nine months after initiation of the demonstration program to obtain early experience with the program. Depending on survey results, an annual survey thereafter would be adequate.

Another option to obtain user feedback would be periodic telephone follow-up

with a small number of randomly chosen users to check on their most recent trips. Assuming the fare media identified the user, the redeemed paper media would be used to randomly choose users to contact. Such telephone follow-up would be very brief and could also serve to verify trip reporting from the taxi companies.

Service quality information can also be obtained through a “secret shopper” method, whereby a designated representative or representatives of the program administrator schedules and takes a trip, with an objective of collecting specific information about the trip that is taken. It is important to recognize that such data are individual trips and the information cannot be attributed to the program as a whole. But “secret shopper” data can be useful to add to service quality information collected through other methods.

## MONTHLY AND ANNUAL REPORTING

The performance data identified above should be summarized on a monthly basis and provided to involved and interested groups, including the participating jurisdictions and the RTCC. During the first six months however, it is recommended that service be monitored on a weekly basis to detect any negative trends quickly. Data from the early months of the program can be particularly useful for fine-tuning practices and this should be the focus for the demonstration program during the first six to nine months. After one year, the program should be reviewed in detail to determine areas in need of adjustment or revision.

Funding for the program should be reviewed. Are funding sources expected to continue? Do the subsidy levels for individual users need adjustment based on available funding and use levels by the participants? If funding seems stable for the near-term future, the program’s status as demonstration can be assessed; it may be appropriate to move the program beyond its demonstration phase.

## SUMMARY

Performance monitoring of the implemented strategies is an important component of the planning process, allowing the RTCC, transit management, stakeholders, and participating jurisdictions to assess the services provided, the resources required to fund the program, and the users’ response to the program. Performance monitoring for a demonstration program is particularly critical as it allows for adjustments and revisions to ensure the program is operating as intended. Decisions can then be made as to the transition of the program to ongoing status. When

the strategies are developed they will address the performance data that should be collected, indicating the entity responsible for collecting the data, the frequency of data collection, and monthly and yearly reporting.

Performance assessment should also involve more qualitative review of the program. This should include methods to obtain feedback from users of the programs, such as user surveys, and input from the taxi companies and drivers participating in the program. Such information will supplement the quantitative assessment based on hard data.

# **APPENDIX A**

## **Existing New Freedom Program Interview Form**

## Existing New Freedom Program Interview Form

**ORGANIZATION INFORMATION:**

**ORGANIZATION:** \_\_\_\_\_  
**NEW FREEDOM PROGRAM NAME (IF APPLICABLE):** \_\_\_\_\_  
**Street Address:** \_\_\_\_\_  
**City, State, Zip:** \_\_\_\_\_  
**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_  
**Website:** \_\_\_\_\_  
**Contact Name: (for inclusion in toolkit)** \_\_\_\_\_  
**Title:** \_\_\_\_\_

**STAFFING INFORMATION:**

**Overall Number of Staff Involved in New Freedom Program Activities:** \_\_\_\_\_

Job Title / Position Name:	Number of Staff	Direct or Secondary Role in New Freedom Program Services?

**Are job descriptions available?** \_\_\_\_\_ **Is an organization chart available?** \_\_\_\_\_

**PROGRAM INFORMATION:**

**New Freedom Program Services (check all that apply):**

- |  |   |
|--|---|
| <input type="checkbox"/> One-Stop Call Center<br><input type="checkbox"/> Travel Training<br><input type="checkbox"/> Voucher Programs<br><input type="checkbox"/> Coordinating Services<br><input type="checkbox"/> Facilitating Coordination Meetings<br><input type="checkbox"/> Escort/ Attendant Services<br><input type="checkbox"/> Accessibility Assessment/Planning | <input type="checkbox"/> Operate Brokerage<br><input type="checkbox"/> Marketing/Outreach<br><input type="checkbox"/> Volunteer Driver Program<br><input type="checkbox"/> Coordinated Planning<br><input type="checkbox"/> Rideshare Program<br><input type="checkbox"/> Land Use / Livability Planning<br><input type="checkbox"/> Develop/Implement Policies and |
|--|---|

Procedures

- Develop Individual Travel Plans for Customers
  - Facilitating Customer Issues with Families and/or Agencies
  - Others (Please describe)
- 

Description of New Freedom Program Services: \_\_\_\_\_

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What was the origin of your New Freedom Program? (i.e. coordinated transportation plan, partnerships between agencies, etc.)

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When did the service begin?

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Current Days/Hours of Operation (if applicable): \_\_\_\_\_

Service Area: \_\_\_\_\_

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Customers Served:  Seniors  People w/ disabilities  People w/ lower incomes  
  Human service agency clients  General Public   
Other \_\_\_\_\_

Customer Eligibility Criteria: \_\_\_\_\_

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Trip Purpose:  Medical/Healthcare  Education/Training   
Shopping  Employment  Social / Recreational   
Childcare  Volunteer activities  Adult Day care  
 Social Services  Religious events  
 Other \_\_\_\_\_

Marketing Materials Available:  yes  no

Types of Materials: \_\_\_\_\_

What technology improvements has your organization made as part of your New Freedom Program activities? \_\_\_\_\_

**NEW FREEDOM PROGRAM DATA:**

How does your agency track program data?

	<b>Report Period:</b> _____
<b>Internet-based information (web hits)</b>	
<b>Non one-stop center contacts:</b>	
Information/referral	
Rider requests	
Trip/Itinerary planning	
<b>Number of one-way trips</b>	
<b>One-stop center contacts:</b>	
Information/referral	
Rider requests	
Trip/Itinerary planning	
<b>On the Bus travel training* (number of persons trained):</b>	
One-on-one	
Group	
Train-the-trainer	
<b>Off the Bus travel training* (number of persons trained):</b>	
One-on-one	
Group	
Train-the-trainer	
<b>Orientation and Mobility training* (number of persons trained):</b>	
<b>Information/marketing materials distributed (# of pieces)</b>	
<b>Number of Volunteer Drivers trained</b>	
<b>Meetings/presentations</b>	

\* Travel training is instruction designed to teach people to travel safely using public transportation. Orientation and mobility is one-to one instruction provided to people who are blind or visually impaired regarding all aspects of independent travel and the use of various forms of public and private transportation.

Is there any additional program data available for your New Freedom project not captured under these items?

**FUNDING:**

New Freedom Program Costs: \_\_\_\_\_ Time Period: \_\_\_\_\_

How is your program funded?

	Funding Source	Funding Amount
<b>Federal/State:</b> <i>Specify Program</i>		\$
		\$
		\$
	<b>Federal/State Total:</b>	\$
<b>Local/Private:</b> <i>Specify Program</i>		\$
		\$
		\$
	<b>Local/Private Sources:</b>	\$
<b>TOTAL PROGRAM FUNDING</b>		\$

Are there other funding programs that indirectly support your mobility management program?

	Funding Source	Funding Amount
<b>Federal/State:</b> <i>Specify Program</i>		\$
		\$
		\$
	<b>Federal/State Total:</b>	\$
<b>Local/Private:</b> <i>Specify Program</i>		\$
		\$
		\$
	<b>Local/Private Sources:</b>	\$
<b>TOTAL OTHER PROGRAM FUNDING</b>		\$

**PROGRAM PARTNERS:**

Agencies/Organizations Involved in New Freedom Program:

- Employers  Economic Development  City Government  County Government
- Elected Officials  Senior Services  Planning Agencies  Human Service Agencies
- Social Service Agencies  Disability Service Providers  Center for Independent Living
- Housing Agencies  Faith-based Organizations  School Systems  Hospitals
- Veteran Organizations  Taxi/Private Transportation Providers  Parks and Recreation
- Transportation Management Associations  Health Departments  Civic Groups
- Non-emergency Medicaid Transportation Providers  Consumer Groups
  
- Family Groups  Others \_\_\_\_\_

**PROGRAM ANALYSIS:**

**Consider following from various aspects of your program: Operational, Organizational, and Administrative**

**What have been the most successful outcomes from your project?**

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**What have been the most difficult challenges?**

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**What unmet needs have been identified?**

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**Which of the following possible programs or potential training areas would help most in supporting your program?**

- Peer-to Peer Network (i.e. Facebook Page)
- Toolkit with Resources in One Location
- Service Opportunities through Mobility Management
- Marketing and Outreach Strategies
- Identifying Funding Opportunities
- Consensus Building
- ADA Basics
- Negotiation Skills
- Financial Management
- General Customer Services
- Providing Person-Centered Services (i.e. developing individual travel plans)
- Working with Diverse Populations
- Sensitivity Training
- Working with Families, Caregivers, and Human Service Agency Staff
- Developing and Implementing Policies and Procedures
- Land Use/Livability Planning
- Presentation Skills
- Other(s): \_\_\_\_\_

**Which of these training or supports do you think are the most important for a new program if beginning a similar effort?**

- Peer-to Peer Network (i.e. Facebook Page)
- Toolkit with Resources in One Location
- Service Opportunities through Mobility Management
- Marketing and Outreach Strategies
- Identifying Funding Opportunities
- Consensus Building
- ADA Basics
- Negotiation Skills
- Financial Management
- General Customer Services
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- Developing and Implementing Policies and Procedures
- Land Use/Livability Planning
- Presentation Skills
- Other(s): \_\_\_\_\_

**Any other comments or thoughts on lessons learned that would help agencies establishing a similar program:**

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**Do you have pictures of your organization and/or services that could be used in a summary of your program?**

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