

KDOT Statewide Coordinated Plan

Mobility Manager Financing, Duties, and Best Practices



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Summary

Mobility management designs transportation around the customer by providing clear information, transit coordination, travel training, and identifying service gaps.

Mobility managers are most common in urban areas, but are successful in rural areas as well.

Many rural mobility management initiatives started with the Federal Transit Administration's 5317 New Freedom funding, but areas lacked funding to continue services once that program ended when the Fixing America's Surface Transportation (FAST) Act was adapted in 2015. Mobility management must now be covered by FTA's 5310 and 5311 grant funding, competing directly with transit services. There are some successful rural mobility management programs, including in Northeast Iowa, Southeast Arizona, and Northwest Colorado. In these areas, mobility managers work fulltime; two for a local community action corporation, and one for a regional government and planning agency. In other areas, mobility manager tasks may be part-time duties of a human service provider.

Official position descriptions often include travel training, connecting riders to providers, connecting transit, human services, and businesses, and developing One-Call/One-Click reservation systems. Other duties include the promotion of transit services, identifying service gaps, operational planning, and advocating for rural transit. In some states, mobility managers are also tasked with organizing regional coordination council meetings.

In Southeast Arizona, mobility management is not to reduce costs, but to shift the burden of networking, training, administration, and service analysis from transit providers to a single regional mobility manager, freeing up time and resources for transit and human service providers to focus on day-to-day transit service. In Kentucky, 16 transit regions select regional transit brokers through a Request for Proposals (RFP) process, which coordinate rural transit in the regions.

Mobility management is an eligible expense under 5310, covered 80 percent by federal dollars and a 20 percent local match as a capital expense, and 5311. The local match can come from state funding sources specifically for transportation or human services, such as disability services or veteran services, or from local funding.

Table 1. State Mobility Manager Comparison

State	Managers per State	Geographic Organization	Funding	Full/part time
Iowa	7 (urban and rural)	16 regional agencies, can be COG or service provider	5311, 5316, state transportation funding, regional COG	Full-time
Arizona		One Regional government and planning agency	5310, state transportation funding, regional COG, hospital grant	Full-time
Colorado	10 (urban and rural)	10 regional and local agencies	5310, state funding for veterans, human services, and regional COG	NW CO COG: Full-time rural
Michigan		22 regional task forces	5311, CMAQ	
Kentucky	10 rural transit brokers	16 regions of human service transportation delivery brokers	5310, mobility management eligible capital cost	Full time transit brokers
Wisconsin	15	County level, some counties work together	5310, 5311	

Mobility Management by State

Iowa

The state is divided up into 16 regional transit systems, nine of which have mobility managers. Most regions with a mobility manager include an urban center.¹ The Rural Transit Assistance Program (RTAP) 5311B provides funding for training and transit assistance for rural transit operators. The Iowa DOT provides training fellowships that pay 80 percent of the costs for rural transit systems and planners to attend DOT sponsored seminars, and other courses and conferences. Funding is also used for reimbursing in-house training.² Iowa devotes an amount equal to 4 percent of new registration fees on the sales of motor vehicles and accessory equipment to support public transportation.³ Marketing funding for routes is also available, at an 80/20 split up to \$12,000 per route.⁴

The Iowa legislature adopted transportation coordination provisions in Chapter 324A.4(1) of the Code of Iowa. This chapter states that any public transit provider must coordinate and consolidate funding with the regional transit system.⁵ Vehicles may be shared by multiple agencies, must accumulate at least 10,000 miles a year, and can only be replaced after reaching at least 100,000 miles. A biannual report on transit coordination is prepared for the Iowa Transportation Coordination Council.

The Iowa Transportation Coordination Council meets every two months.⁶ It consists of multiple state departments, federal agencies, and statewide organizations participate to discuss mobility management, coordination, and transportation planning. The council organizes the annual “Passenger Transportation Summits,”

¹ Iowa Mobility Management, Iowa DOT, <https://www.iowadot.gov/iowamobilitymanagement/>

² “State Fiscal Year 2018: Iowa Public Transit State Funded Programs,” Iowa Transportation Commission, <https://iowadot.gov/transit/funding/FY%202018%20State%20Public%20Transit%20Programs.pdf>

³ “Iowa’s Clean Air Attainment Program (ICAAP),” Iowa DOT, <https://iowadot.gov/transit/funding-programs-and-applications/funding-programs#310741146-iowas-clean-air-attainment-program-icaap>

⁴ “Transit Manager’s Handbook, Chapter 3,” Iowa DOT (2016), https://iowadot.gov/transit/handbook/Chapter_3.pdf

⁵ “Transit Manager’s Handbook, Chapter 15,” Iowa DOT (2016), https://iowadot.gov/transit/handbook/Chapter_15.pdf

⁶ “Transportation Coordination in Iowa,” Iowa DOT (2016), https://iowadot.gov/transit/regulations/Transportation_Coordination_2016.pdf

bringing together over 100 stakeholders from different disciplines to discuss issues affecting transit.

The Iowa DOT describes the responsibilities of mobility managers as follows:

“Assist individuals in navigating from point A to point Z, no matter the number of modes of transportation required. Referrals are made to public and private transportation providers alike. Mobility coordinators may provide travel training, showing persons how to ride the bus if they have never had that experience. Mobility coordinators also meet with human service agencies, businesses, and other organizations to inform them of the public transit services available to inspire more coordination.”⁷

A statewide mobility coordinator acts as the mobility manager for the areas without a regional mobility manager, provides information on the benefits of mobility management to transit agencies, planning organizations, and other organizations, and chairs the Iowa Mobility Manager’s Network. The statewide mobility coordinator is a staff member of the Iowa DOT Office of Public Transit.

- Jeremy Johnson-Miller, Transit Programs Administrator/Statewide Mobility Coordinator, 515-239-1765, Jeremy.Johnson-Miller@iowadot.us

Case Study

The Northeast Iowa Community Action Corporation is a social service agency with a mobility manager serving primarily rural areas. It covers five counties in Northeast Iowa, based out of Decorah. The agency has 53 vehicles, 50 part-time drivers, and provides over 175,000 rides a year.⁸

A full-time mobility manager is employed by the community action corporation to cover the region. The main duties include community outreach, marketing, working with area employers, travel training, identifying gaps in service and unmet needs, and keeping track of the regional transportation inventory. The mobility manager leads the regional transportation advisory group together with a planner of the regional council of governance, networking with area decision makers and human service providers. Federal funding comes from 5311 and 5316 Job Access and Reverse Commute Program (JARC). Local funding comes from farebox revenue and saved past surpluses. A regional transportation summit will be held on October 18, 2017.⁹

- Sam Castro, Mobility Manager Northeast Iowa Community Action Corp. 563-387-4923, scastro@neicac.org

⁷ Ibid.

⁸ “EARL Public Transit,” Northeast Iowa Community Action Corporation, <http://neicac.org/transit>

⁹ Email, Sam Castro, July 6, 2017

Arizona

Case Study

The Southeastern Arizona Government Organization started a 3-year Arizona DOT pilot program for Mobility Management in the counties of Cochise, Graham, Greenlee, and Santa Cruz.¹⁰ This region has a combined population of 219,000. The rural area mobility management is to reduce the operating and administrative costs. The regional mobility manager helps with the One-call/One-click system, budget development, grant applications, mapping, and driver training. The mobility manager is to shift the administrative and coordination burden from provider to the mobility manager, allowing the provider to focus more on direct service. Overall costs don't go down.

On the website AZmobility.org, clients and providers can find information regarding service, but also planning and educational materials, and vehicle inventories. A calendar shows the schedule of workshops and coordination meetings.¹¹ Most reservations are still made by phone, as 90-95 percent of clients are mono-lingual Spanish speakers. The mobility manager for the region, Connie Gastelum, started as a driver and then as a transit provider operator before becoming the first mobility manager for the region. Using that personal experience, she knows what providers need to look out for and what they need to be trained in, such as budget training. The regional mobility manager position was created after mobility managers within the existing provider structure would mainly look out for the interest of their own providers.

The position is funded through 5310 federal funding and local funding from the regional planning agency SEAGO, the area agency on aging, and a legacy grant from a local hospital system. Her daily duties include training, preparing for coordination meetings, keeping providers and human service agencies connected, and identifying gaps in the system. Many transit providers see high turnover rates in personnel, thus require constant training. Over 300 people were trained in 2015 and 2016. She also helps local providers find local matching funds for the 5310 grant, but priority is given to providers who participate in coordination activities.¹² Priority for operating funding is considered in the following order: projects serving a broad mission,

¹⁰ "Regional Mobility Management for the SEAGO Region – Graham, Greenlee, Cochise, and Santa Cruz Counties," Southeastern Arizona Governments Organization – SEAGO (2012), <https://www.keepandshare.com/doc12/238972/regional-mobility-management-plan-for-the-seago-region-6-29-2012-pdf-7-2-meg?da=y>

¹¹ Southeast Arizona Mobility, <https://www.azmobility.org/>

¹² Phone interview, Connie Gastelum, July 6, 2017

projects going above and beyond ADA requirements, projects providing continued funding to areas that lack public transit alternatives, services actively participating in coordinating activities, and new projects addressing regional service gaps.¹³

- Jessica P. Urrea, Assistant Regional Mobility Manager at 520.432.5301 Ext 215, Connie Gastelum, Regional Mobility Manager, at Ext. 213

The regional mobility manager is officially tasked with:

“Providing greater public access to transportation and transportation information; providing support to existing local mobility managers and transportation providers; identifying ways to fill gaps in the provision of transportation services; identifying ways to ease barriers and reduce costs for transportation providers; and act as a conduit between transportation providers and transportation funders.”¹⁴

Mobility management serves to:

“Act as an advocate for the development of federal, state, and local policy that supports the advancement of rural transportation opportunities and stated goals, create partnerships with transportation providers, social service agencies, government agencies and the public to reduce costs, to enhance travel options, and to improve safety.”

The mobility manager further seeks to standardize program operations, training, and policy/ procedures, for resources to be more effectively shared and program costs to be reduced.¹⁵

Colorado

Colorado has 10 regional and local coordinating councils in place, but they do not cover the entire state.¹⁶ They use 5310 funding, but the lack of federal and state funding, interest among local providers, and the difficulty finding a local match

¹³ “Transportation Coordination Plan Update,” Southeastern Arizona Governments Organization – SEAGO (2017), <https://www.keepandshare.com/doc12/242802/seago-fy17-transportation-coordination-plan-update-03-31-17-pdf-3-0-meg?da=y>

¹⁴ “Regional Mobility Management,” Southeastern Arizona Governments Organization – SEAGO, <http://www.seago.org/tsp/rmm.html>

¹⁵ “Transportation Coordination Plan Update,” Southeastern Arizona Governments Organization – SEAGO (2017), <https://www.keepandshare.com/doc12/242802/seago-fy17-transportation-coordination-plan-update-03-31-17-pdf-3-0-meg?da=y>

¹⁶ “Statewide Transit Plan,” Colorado DOT (2015), <https://www.codot.gov/programs/transitandrail/plans-studies-reports/statewidetransitplan/statewide-transit-plan/view>

hinder coordination. However, the state does have a higher share of local funding for transit compared to national average.

Case Study

The Northwest Colorado Council of Governments started its coordination efforts in 2010, initially geared towards providing better service for seniors. It received a 5310 mobility management grant in 2012, and a Veterans Transportation and Community Living Initiative grant (VTCLI) through the Colorado Department of Transportation.¹⁷ The mobility manager was tasked to develop a One Call/One Click Center, a regional billing mechanism for Non-Emergent Medicaid Transportation, conduct a regional transportation services inventory which included both human services agencies and transit providers, conduct a detailed gap analysis of the transit needs across the region, and to expand coordination of and access to transportation resources. The services inventory and gap analysis were completed in 2013.

With the study and implementation work completed, the Mountain Ride Transportation Resource Center started operating in August of 2014. Its website, mtnride.org, provides resources by county for fixed route and door-to-door services. It is a non-profit organization accepting donations, while local support comes from the Rural Resort Region, local transit agencies, and human services transportation providers. Staff continues to identify funding sources in an effort to maintain call center services and strives to be self-sustaining.

- Susan Juergensmeier, Mobility Manager, 970.468.0295 x110, mobilitymanager@nwccog.org

Michigan

The state has 22 rural transportation task forces, overseen by a rural task force oversight board.¹⁸ The local boards consist of elected officials, administrators, and rural transit providers. The task forces are subareas of the 14 state planning and development regions. Several areas started mobility management programs funded through the 5317 New Freedom program, which is now expired, for people with disabilities to overcome transit barriers.

¹⁷ “Regional Transportation Coordinating Council,” Northwest Colorado Council of Governments, <http://nwccog.org/programs/regional-transportation-coordinating-council/>

¹⁸ “Statewide Guidelines and Operating Procedures for Rural Funding and Planning Coordination,” Michigan DOT (2016), https://www.michigan.gov/documents/mdot/Rural_Task_Force_Guidelines_537948_7.pdf

Case Study

Traverse City now uses 5311 and Congestion Mitigation and Air Quality Improvement (CMAQ) money for mobility management, replacing 5317.¹⁹ The city works to improve inter-county route planning, data sharing, regional funding efforts, building relationships with private sector, human services, and marketing.

Kentucky

Human service delivery brokers provide transit coordination in 16 regions of the state.²⁰ There currently are ten transit brokers, all selected through an RFP process for each region. The state put heavy emphasis on coordination after large cost increases during the 1990's. The brokers serve as mobility managers and are an eligible capital cost under 5310. Their duties include:

- The promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals;
- The operation of transportation brokerages to coordinate providers, funding agencies and customers;
- The provision of coordination services, including employer-oriented 'Transportation Management Organizations' and Human Service Organizations' customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
- The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
- Operational planning through Geographic Information Systems (GIS) mapping, coordinated vehicle scheduling, dispatching and monitoring technologies as well

¹⁹ "mobility Management & Coordination Strategies," Smart growth America (2013), <https://smartgrowthamerica.org/app/legacy/documents/traverse-city-mm-final-report.pdf>

²⁰ "Kentucky State Management Plan: Section 5311, 5310, 5339," Kentucky Transportation Cabinet (2017), <http://transportation.ky.gov/Transportation-Delivery/Documents/MASTER%20KY%20State%20Management%20Plan%20FTA%20Approved%203%208%202017.pdf>

as technologies to track costs and billing in a coordinated system and single smart customer payment systems.²¹

Wisconsin

An interagency council on Transportation Coordination formed in 2005. Through this initiative, 29 mobility managers operated in the state, 16 through 5317 New Freedom funding. Since the end of that program, 15 mobility managers still work through the 5310 and 5311 programs, most in areas with at least one urban center.²² Funding for mobility management comes primarily from federal sources but also state sources such as the County Elderly and Disabled Transportation Assistance program. Mobility managers primarily work at the county level in the state.

Mobility services include conducting needs assessments, promoting collaboration, coordinating funding, training volunteers, coordinating services or programs, transportation marketing, developing inventory of available services, trip planning, and identifying customer needs. Organizations that provide mobility management services include community action programs, transportation providers or agencies, ADRCs/aging units, community disability and senior services and organizations, social and human service organizations or agencies, regional planning commissions, independent living centers, and the VA. The Wisconsin Association of Mobility Managers provides resources, training, and conferences for mobility managers.

- <http://www.wi-mm.org/index.html>

Ohio

Mobility management in Ohio is funded through 5310 and a local match, with 19 counties still not participating in any rural transit coordination efforts.²³ The state defines mobility manager tasks as: “providing technical assistance with locally developed, coordinated public transit human services transportation plans, holding coordination council meetings, implementing new mobility management practices, creating and keeping up to date a website for projects that also serves as a place for local/regional transportation information, taking responsibility for developing solutions to transportation problems in the community, attending at least one mobility management related conference, participating in mobility management

²¹ Ibid.

²² “Mobility Management practices in Wisconsin,” Wisconsin DOT (2015), <http://wisconsin-dot.gov/Documents/doing-bus/local-gov/astnce-pgms/transit/mob-prac.pdf>

²³ “CY 2018 Mobility Management Allocation Process,” Ohio DOT, <http://www.dot.state.oh.us/Divisions/Planning/Transit/Pages/Coordination.aspx>

related meetings and meeting one-on-one with riders, major employers, economic development groups, local business associations, human service agencies, local governments and other funders.”²⁴

²⁴ “Mobility Management practices in Wisconsin,” Wisconsin DOT (2015), <http://wisconsindot.gov/Documents/doing-bus/local-gov/astnce-pgms/transit/mob-prac.pdf>