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## Mobility Action Plan (MAP) Phase I Implementation Study Stakeholder Involvement Process Report

### Overview and Purpose

This task report covers the work effort and results of stakeholder involvement element of Subtask 2.4. The original RFP required that the selected contractor accomplish the following:

*“...develop a clear mission and Strategic Implementation Plan (SIP) guided by local, regional, State, and federal stakeholders input that identifies human services transportation coordination barriers and gaps, and develop strategies to address how transportation funding programs could be coordinated.”*

*“Develop priorities for coordinating human services transportation and a strategic plan, through open and informed discussions among various stakeholders from urban and rural areas.”*

The process undertaken by the JNTC project team to involve and secure participation from agency and organization stakeholders in the MAP study “coordination” dialogue was broad-based and included outreach strategies designed to solicit the individual and collective viewpoints and perspectives of those stakeholders who participated including:

1. Public transit operators and transportation planning agencies;
2. Regional providers and funders of human and social service agencies and organizations; and
3. Designated local and community-based human service agencies and organizations.

### Stakeholder Involvement Process

JNTC proposed to schedule, conduct and facilitate as many stakeholder involvement opportunities as reasonable, and to employ the following outreach techniques and strategies, as follows:

1. **Project-related presentations and/or workshops** to ensure that important agency/organization stakeholders were kept informed and involved in the study;
2. **Opinion leader telephone interviews** to include staff representatives of stakeholder agencies and organizations, including MAP PAC members, MPOs/RTPAs, etc.
3. **Regional roundtables and discussions** for stakeholders statewide. JNTC initially proposed to conduct up to 12 sessions in agreed upon statewide locations;
4. **Face-to-face and/or telephone meetings and briefings** on project issues for the Caltrans Project Manager, CHHS and MAP PAC and subcommittee members as appropriate; and
5. **Posting of a project-related fact sheet, meeting summaries and notices** and other

informational project materials on the Caltrans website.

JNTC had also proposed to conduct a series of small focused group discussions for interested stakeholder peer groups (e.g. regional centers, CTSA representatives, Rural Counties Task Force, etc.). However, budgetary constraints impeded our ability to conduct these meetings.

The activities which designed to ensure continuous stakeholder involvement, education and participation (#1, #4, and #5 above) will continue throughout the duration of the MAP study.

In addition, consistent with #2 and #3 above, the JNTC project team conducted and completed interviews of stakeholder agencies and organizations and conducted eleven (11) regional roundtables via teleconference in regions throughout the state.

To introduce public transit, human service and other stakeholders (MPOs/RTPAs, District staff, etc.) to the MAP study and the stakeholder involvement process, Caltrans staff and the project team:

- Provide a study update and study-related information to Caltrans' District staff in all regions statewide;
- Developed and distributed an introductory letter to all Metropolitan Planning Organizations (MPOs) and Regional Transportation Planning Agencies (RTPAs) throughout the state describing the MAP study and welcoming their participation accompanied by follow-on telephone calls; and
- Developed and posted a MAP study project Fact Sheet.

This report documents the methodology, process, and results of these work efforts and their relevance to other work activities and the development of the Strategic Implementation Plan (SIP).

### **Stakeholder Interview Methodology**

Working with Caltrans and the MAP PAC, JNTC developed eight (8) themes to guide the development of a stakeholder interview questionnaire that would be used to collect useful information from public transit and human service agency/organization stakeholders relative to coordination. The following general themes were developed:

- Roles and Responsibilities related to Transportation
- Funding Sources Used for Transportation
- Understanding and/or Participation in Coordinated Projects
- Perspectives on Regional Coordination Efforts
- Barriers, Policies and Practices that Inhibit Coordination; Suggestions
- Understanding of Mobility Management and Consolidated Transportation Service Agencies (CTSAs)
- Ideas for Improving Public Transit and Human Service Agencies/Organizations communications
- Statewide Priorities

The interview questionnaire (Appendix A) was then developed which included a total of fourteen (14) single-and-multiple-part questions consistent with the established themes/topics. The stakeholder interviews were designed to be conducted via telephone by JNTC project team interviewers to ensure that thorough and complete answers were provided by the interviewee. However, to secure a greater percentage of participation the interview questionnaire could be self-completed and returned via electronic mail, fax or regular mail by interviewees.

The interview questionnaire was initially distributed via electronic mail to all MAP PAC members, with the exception of Caltrans District staff representatives, accompanied by a due date notice and instructions.

In addition, following telephone contact with MPOs and RTPAs throughout the state to introduce the MAP study, interview questionnaires were distributed to these agencies and organizations to complete. The JNTC project team also interviewed agencies and organizations that were referred by MAP PAC members.

Project team interviewers were instructed to contact stakeholders up to three times to solicit and obtain participation. Telephone logs were used to ensure that each interviewer made efforts to secure completed interviews.

About half of the interviews were scheduled and conducted by telephone by JNTC project team. The remaining interviews were completed by agencies and organizations without assistance and returned via electronic mail and by fax. A total of fifty-four (54) agencies and organizations returned completed questionnaires. Not all questions were answered by each agency/organization.

The list of agencies and organizations who participated in the interviews is shown in Appendix B. An overview of the responses by theme/topic/question is presented below. The detailed interview queries and responses for all questions will be appended to the final report.

## **Interview Responses**

### **Agency/Organization Roles/Responsibilities Relative to Transportation**

The first multiple-part question was designed to: identify the various types of agencies and organizations participating in the interview process; as well as, for the purpose of understanding each respondent's role in the provision of transportation services and/or agency/organization's day-to-day response to client need for transportation services.

#### *Responding Agency Types*

Table I below shows a summary of the types of agencies/organizations participating in the interview process.

**Table 1**  
**Responding Agencies/Organizations**

8	Advocacy Groups
1	Healthcare Agencies
1	Private Agency
4	Public Service Agencies
14	Social Services Agencies
26	Transit and Planning Agencies
<b>54</b>	<b>Agencies and Organizations</b>

*Agency/Organization Roles/Responsibilities Related to Transportation*

**Q1: Directly operate transportation or contract for service(s)?**

About half of the respondents answered that they directly operate or contract out for transportation service(s).

**Q2: Arrange transportation for customers and/or clients?**

Less than half of the respondents indicated that they arrange transportation for customers and/or clients.

**Q3: Offer referrals to transportation?**

Three-quarters of those responding indicated that they provide referrals to customers and/or clients to transportation.

**Q4: Subsidize transportation for customers and/or clients?**

Approximately two-thirds of the respondents indicated that they do not subsidize transportation for customers and/or clients.

**Funding Sources Used By Agencies/Organizations for Transportation**

**Q5: Receive Federal, State or Local funding for transportation?**

A vast majority of the respondents indicated that they received Federal, State or Local funding for transportation.

Table 2 details the funding sources received by agencies and organizations to fund transportation.

**Table 2**  
**Funding Sources Received By Agencies/Organizations**

FTA 5303, 5304,5309,5310,5311,5316,5317,5317,CMAQ
Local Transportation Funds (LTF)
State Transit Assistance (STA)
Transportation Development Act funding (TDA)
Proposition 1B
Caltrans Planning Grants
Federal Medi-Cal Waiver funding
Medi-Cal
Department of Development Services funding
Tobacco Settlement funds
Office on Aging Senior Mobility funding
Local Sales Tax Measure and Propositions funding

**Agency/Organization Understanding and/or Participation in Coordinated Transportation Projects**

***Q6: Familiar with JARC and New Freedom funding programs?***

A vast majority of respondents indicated that they were familiar with JARC and New Freedom funding programs.

***Q6a: Participate in the funding process for JARC and New Freedom?***

Over half of those responding indicated that they had participated in the JARC and New Freedom funding process in their region; just over one-third indicated that they had not participated.

***Q6b: If your agency/organization did not participate in the funding process, why not?***

Some reasons cited included:

- No projects identified or ready to launch
- Staffing limitations
- Not a transportation provider
- Did not know
- Not qualified
- High administrative burden for limited funding

**Q6c: If your agency did participate in JARC and New Freedom funding process, were you awarded funding?**

Almost half of the respondents indicated that they were awarded funding; and the exact same number indicated that they were not awarded funding. The number of agencies/organizations not awarded funding is consistent with the number of those who did not participate in the funding process.

Respondents who were awarded JARC or New Freedom funding provided information on what types of projects were funded as shown in Table 3.

**Table 3  
 Types of Projects Funded from JARC and New Freedom**

# of Responses	% of Total Responses	
4	13%	Capital Improvements
1	3%	511/211
8	26%	Mobility Management
7	23%	Services for Low Income
1	3%	Services for Multiple Target populations
3	10%	Services for Persons with Disabilities
1	3%	Services for Seniors
3	10%	Travel Training
1	3%	Volunteer Driver Projects
2	6%	Vouchers/Tickets
<b>31</b>	<i>Total Responses</i>	

**Perspectives on Progress of Regional Coordination Efforts thus far; Suggestions for improvement**

**Q7: Involved in Coordinated Plan development process?**

Vast majority of agencies and organizations responding indicated that they had been involved in the Coordinated Plan development process.

**Q7a: If your agency/organization was not involved in the Coordinated Plan development process, why not?**

Some reasons cited included:

- Meetings times/locations were inconvenient
- Not invited to attend meetings or participate
- No notice received
- Other priorities

- Process was highly politicized; lacked analytical rigor

Of those agencies/organizations responding who indicated that they were not involved in the development of the Coordinated Plan, more than half of these agencies/organizations were located in Caltrans District/MAP Study geographic Region 3 (Sacramento – Urban County) and geographic Region 7 (Los Angeles – Urban County).

***Q7c: Has the development of the Coordinated Plan in your region been successful in helping to promote coordination?***

More than half of those responding indicated that they believed that development of the Coordinated plan has helped coordination.

Almost one-third of the agencies/organizations participating in the interviews did not respond to the question.

***Q7d: Ideas about additional support that could be provided to regional agencies and organizations to assist them in local coordination efforts?***

Suggestions about additional support that could be provided to regional agencies and organizations are shown below in Table 4.

**Table 4  
 Suggestions for Additional Support**

<b># of Responses</b>	<b>% of Total Responses</b>	
1	2%	Alternative Modes of Service
4	8%	Coordination Mandates
5	9%	Coordination Meetings and Workshops
1	2%	Cost Allocation Education
7	13%	Education on Coordination
4	8%	Examples of Working Coordination (Best Practices)
13	25%	Funding
2	4%	Mobility Management
3	6%	Public Participation
4	8%	Resource Center/Portal for Agencies
1	2%	Technical Assistance
3	6%	Travel/Sensitivity Training
3	6%	Utilization of CTSA's
2	4%	Other
<b>53</b>		<i>Total Responses</i>



## **Recognized Barriers, Policies and Practices that Inhibit Coordination and Suggestions on How to Mitigate these Issues**

### ***Q8: Aware of existing internal or external policies which limit and/or prohibit coordination?***

More than two-thirds of those agencies and organizations responding to this question indicated that they are aware of barriers to coordination. Barriers/limitations to coordination cited included:

- Funding (cited numerous times)
- California Medicaid policies do not allow for coordination between Medicaid providers and public transit
- Insurance liability related to vehicle sharing
- TDA farebox recovery requirements
- Institutional barriers between public transit and multiple providers
- Limitations on existing funding sources inhibiting ability to share resources (requirements related to serving specific rider groups (Vets, school children, health plan members, etc.)

### ***Q9: Awareness of local policies not being enforced?***

Almost two-thirds of those responding indicated that they are not aware of local policies which are not being enforced.

### ***Q10: Suggestions to address or eliminate barriers?***

- Coordinate with CTSA's and empower them; take steps to assure that each region has CTSA
- State-level conferences that promote changes to California NEMT reimbursement policies
- Work with California Medi-Cal to change their regulations
- Make sure that funding is available for both operating and capital
- Need flexible funding mechanisms
- Open door policy for seamless path of travel from one district to another

## **Understanding of Mobility Management and Consolidated Transportation Service Agencies**

### ***Q 11: Does your agency/organization have an understanding of Mobility Management?***

Almost all agencies/organizations indicated that they have an understanding of the concept of mobility management.

### ***Q 11a: If yes, have you proposed or implemented mobility management projects?***

Over half of those agencies/organizations responded that they have also proposed or implemented projects with a mobility management element.

### ***Q 12: Are agencies/organizations familiar with CTSA's?***

Over three-quarters of those responding indicated that they are familiar with CTSA's.

***Q 12a: If yes, have you worked with CTSA's on coordinated plans and/or projects?***

Slightly under two-thirds of respondents said that they had worked with CTSA's on coordinated plans and/or projects.

**Ideas for Improving Communications Between Public Transit and Human Service Agencies and Organizations**

***Q 13: Ideas for improving communication between public transit and human services?***

Suggestions for improving communications between public transit and human service agencies and organizations provided by respondents included:

- Regional conferences, trainings and workshops between public transit and human services
- Strengthen outreach efforts and membership opportunities within RTPAs SSTAC
- Listen, follow-up and implement ideas that benefit the system as a whole
- An Executive Order from the Governor to make agencies coordinate transportation resources
- Stronger coordination efforts from state level down would help set precedent

**Regional Perspectives on Priorities designed to facilitate coordination of Transportation through a State-Wide Strategic Plan**

***Q 14: Ideas for developing statewide priorities?***

- Money to make it actually work and not just a mandate to coordinate
- Land use and transportation accessibility
- Need to pool findings and funding strategies
- There has to be a statewide universal compliance of CTSA designation
- Promote mobility management
- Address accessibility compliance for persons with disabilities
- Look at communication models that are effective and lead to coordination

**Interview Findings and Results**

The interview process offered interested stakeholders another opportunity to provide valuable input relative to their individual understanding and opinions on issues related to coordination activities in their region. The findings and results of the interviews are discussed, as follows:

1. The roles and day-to-day responsibilities related to transportation of both public transit operators and providers and human service agencies not only includes provision of direct or contracted service on the street for customers and clients, but also involves arranging and/or referring individuals to other available transportation options. This validates the coordinated plan review findings related to the need for communication between public transit and human service agencies and organizations to ensure the

availability of up-to-date information on the service options available for the target populations at the local level.

2. For the most part stakeholder agencies and organizations indicated that they were familiar with the JARC and New Freedom (NF) funding programs and the Coordinated plan development process in their region. In addition, many agencies and organizations participated in the JARC and NF competitive selection process conducted in their respective regions. However, responses to this question show that there is some work to do to promote human service agency/organization involvement in the plan development, as well as the funding and project selection process.
3. For those stakeholder agencies and organizations that indicated that they did participate in the funding process many were funded for submitted projects. The top three types of projects funded were: 1) Mobility Management (26%); 2) Services for Low Income (23%); 3) Capital Improvements. Stakeholder responses definitively show that the number of those not participating in the project funding process in their region directly correlates with the number of those not participating in the process. Additional funding agency outreach and/or technical assistance activities will be useful in enhancing awareness, understanding and participation in the funding process. These activities could include informational forums conducted periodically throughout the year, and/or facilitated project development meetings to promote communication and partnering and to develop coordinated project concepts.
4. As over half of the stakeholders participating in the interview process indicated that the development of the Coordinated plan has helped coordination overall. However, they also provided numerous suggestions on what assistance they believe is needed to improve local coordination efforts. The top three (3) suggestions were: 1) Funding (25%); 2) Education on Coordination (13%); and 3) Coordination meetings and workshops (9%).
5. Stakeholders identified a number of internal/external policies that they believe limit or prohibit coordination. The lack of funding was identified as a significant barrier, which reinforces stakeholder agency responses citing the need for funding assistance to improve coordination efforts.

In addition, stakeholder responses to this question served to validate and support some of the findings of the study legislative analysis work effort. Agencies and organizations did identify some state mandated funding and other liability-related policies as being barriers to coordination overall including: TDA farebox recovery requirements, Medi-Cal reimbursement for public transit, insurance liability related to vehicle sharing between agencies, etc. Specific suggestions pertaining to addressing or eliminating these legal and funding barriers included: working with the state to change regulations related to Medi-Cal specific to Non -Emergency Medical Transportation (NEMT) and TDA, making for operating funding available, increase flexibility of funding mechanisms.

6. Mobility management is viewed by stakeholders as very important of promoting and facilitating coordinated plans and projects. Many stakeholders indicate that they not only have an understanding of mobility management, but also have proposed or implemented projects which include mobility management activities.

7. In terms of their understanding of CTSAs, public transit and human service agencies/organizations indicated that they were not only familiar with these agencies, but that they are working or have worked with CTSAs on coordinated plans and projects in their region. This is consistent with the findings of other MAP study tasks (e.g., Coordinated plan reviews and legislative review and analysis) in that stakeholder responses on this question appear to validate the importance of CTSA involvement at the local level in the development of coordinated projects and activities.
8. The ideas offered by stakeholders for improving communications between public transit and human services were varied and ranged from implementation of state mandates on public transit and human services to coordinate to providing regional conferences, increased education and training to agencies and organizations.
9. In developing statewide priorities promoting mobility management and facilitating and leveraging the efforts of CTSAs were cited as important, including designation of CTSAs throughout the state. Addressing funding needs at the state level was a theme that was cited as a priority.

The key findings and results of the interviews will be used to guide the development of priorities and strategies developed as part of the legal and regulatory analysis, and will be used to inform the draft Strategic Implementation Plan (SIP) document.

## Regional Roundtable Discussion Meeting Methodology

The JNTC project team proposed to conduct up to twelve (12) regional roundtable discussion meetings throughout the state. The roundtable discussion meetings were envisioned to allow renewal of the stakeholder dialogue that began during the Coordinated plan development process within each region, by soliciting the views and perspectives of public transit and human service agency stakeholders relative to their understanding and involvement in coordinated transportation plans, projects and programs. The results of these meetings would then be used to assist in crafting priorities and strategies for development of the SIP at the state level.

With approval from Caltrans staff and the MAP PAC, JNTC used the existing Caltrans District map as a template to develop study-related geographic regions related for the purpose of conducting the roundtables throughout the state. With only one exception (combining Districts 7 and 12, Los Angeles/Ventura and Orange County into one geographic region) study geographic areas were consistent with Caltrans district boundaries throughout the state. This resulted in creation of eleven (11) instead of twelve (12) study geographic regions (Appendix C).

In addition, in an effort to secure centralized locations for the roundtables to ensure maximum stakeholder participation, the Caltrans PM and the project team worked with Caltrans' District office staff in each region to schedule on-site meetings. Challenges related to state budget issues subsequently precluded on-site meetings. Instead, teleconference roundtable meetings were ultimately conducted.

In consultation with Caltrans staff and the MAP PAC, JNTC developed discussion questions to facilitate stakeholder discussion during the meetings. Questions for the roundtable discussions were developed to be consistent with themes/questions used during the stakeholder interview process. Roundtable meeting questions were developed and approved for use and are included as Appendix D.

A meeting announcement, accompanying schedule and questions were developed and distributed electronically to stakeholders in advance of the meeting. The roundtable teleconferences were initiated with a brief welcome and introduction to MAP study purpose and objectives by the Caltrans Project Manager. The roundtable discussion was facilitated by JNTC project team members. The duration of roundtable discussion meetings was two and one-half hours. For the most part meetings were audio tape recorded and summarized. However, due to audio recording malfunctions during the meeting conducted for study geographic Region 9, a complete summary is not available. Notes for the Bishop meeting will be appended to the final report. The ten (10) remaining completed meeting summaries, including agencies and organizations participating in each of the eleven (11) regions will be appended to the final report.

Summaries of the meetings conducted by region are presented below. It should be mentioned that during some roundtable discussions meetings, questions that were similar were combined to allow participants to provide a single response to more than one roundtable question at a time. This was done to ensure that participants had enough time to respond to all questions, and is reflected in the summaries below.

## Roundtable Discussion Meeting Overview

### District 1 Roundtable Discussion Meeting Summary of Key Points

- 1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**
  - Participation in the development of the Coordinated Transportation plan in this region varied from leading the development of the plan to attendance and participation at outreach events and interviews to provide input on coordination issues. Regional planning agencies, transportation agencies, Planning Councils, and social service organizations participated. These efforts included working with Caltrans Headquarters and its designated consultant on the coordination plans.
- 2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**
  - Many agencies did develop projects and apply for funding. Projects consisted of a variety of types, including providing non-emergency medical transportation in rural areas for tribes located in the region. Agencies have submitted applications for grant funding to provide mobility management services and centers, and to conduct a study on non-emergency medical transportation. Conducting further research into issues relate to equity for transportation related to disadvantaged populations.
- 3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**
  - Agencies concurred that transportation service in rural areas is a lifeline issue. Rural transportation is being defined in some parts of the country not in terms of productivity but as “essential transportation.”
  - Rural geographical areas present transportation challenges related to distances and clients who are dispersed in many areas. Population densities tend to be lower and this makes it difficult to create a critical mass necessary for public transit trips. Some distant inland areas do not have public transit service available. Funding reductions can have a greater impact on service where it is no longer feasible. Disadvantaged transportation clients are affected by these transportation-related challenges.
  - Lack of availability of medical services in rural areas. Often times, clients must travel long distances to reach medical facilities or locations that are not readily accessible. These include dialysis facilities.

- Limited funding sources inhibit organizations and agencies from implementing programs that are identified through the Unmet Needs process. In addition, the funding process can be lengthy leading to delays in the implementation of mobility programs.
  - Grant funding requirements that limit eligibility to specialized segments of the population. This lack of flexibility of makes it challenging to provide services to a range of individuals. This leads to inefficient use of vehicles and low service productivity, where they are not full.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**
- 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (E.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
- Internal agency/organizational communication. The need to communicate between departments is critical to remaining aware of planning decisions on bus stops, streetscape and other infrastructure projects.
  - Performance measure requirements including farebox recovery are challenging. Requirements inhibit public transit operators from providing service in rural areas. Transportation Development Act farebox requirements in some rural areas are high at 14.9 percent.
- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
- Education, communication, networking and gathering key stakeholders on regular basis. It is important to exchange information on current needs and solutions to issues.
  - Continue use of the SSTAC to address coordination issues. It has a good representation of low income and senior social service providers. The membership of the committee could be expanded to include other departments such as public works to create opportunities to coordinate on planning and infrastructure issues.
  - Provide technical expertise on how to address coordination issues.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Create opportunities to share information through roundtable discussions.
- Continue funding workshops such as those held by Caltrans on JARC and New Freedom.
- Develop accessible resources, tools and checklists for both rural and urban areas. These could be presented at workshops or on a website.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Support for rural transit is critical. People use these services year after year and build their lifestyles around them. Reducing or removing these linkages will cause these services to disappear.
- Examine the TDA requirements which are essential to coordination and providing service in rural areas.
- Set different priorities and measures for rural areas. Populations, densities and congestion issues in urban areas are very different from rural areas. Rural areas have specialized needs regarding types of vehicles, service operations and issues.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

- Conducting workshops to provide a forum for agencies to gather and share ideas, information, funding opportunities and understand the nature of common problems. Providing a third party to help facilitate the sessions would be helpful.

**District 2 Roundtable Discussion Meeting Summary of Key Points**

**1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- A number of agencies and organizations did participate in plan development. One agency served as the RTPA and participated in preparing the plan for their region. Others participated as stakeholders providing input to the process.



**2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**

- Agencies and organizations did develop and submit coordinated projects for funding. Projects varied from transportation one-stop call-in information services, new transportation services and technology based solutions. Projects included a pilot project to implement a 211 call-in service in coordination with transportation providers and human service agencies, developing Google Transit which involves Amtrak, providing service for medical trips, and reimbursement programs for gas mileage. Human service agency received authorization to transport persons with disabilities under 60 years of age.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- Two issues raised concerned and posed challenges to agencies and organizations specifically related to mapping and walkability. GIS mapping is not always accurate because of the new roads that have been built over the years. Walkability issues regarding urban areas where the “rule of thumb” is one mile and for rural areas it ranges from two to three miles.
- Lack of availability of needed local medical services leads to travel to other regions of Northern California. Clients must travel to other areas for medical services where transportation is not readily available. In some cases, finding transportation for the return trip is difficult.
- Rural areas create challenges due to the long distances for travel. Providing trips to nutrition centers, as well as social and medical services is challenging.

**4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization’s ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

- Communication could always be enhanced which is an important part of coordination. There could be ways to combine training programs as well.
- Insurance restrictions relating to liability and risk for transit agencies. For example, when a vehicle was shared, an incident occurred and the agency was sued. “Deep pockets” litigation is another concern.

- Limitations on staff time make it challenging to coordinate with other agencies. Agencies are under staffed with multiple obligations that make it difficult to coordinate.
  - Lack of adequate funding for projects and staff time is an on-going issue.
- 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
- Restrictions on specialized transportation do not allow public transit riders to utilize these services. Consequently, there are many vehicles in the same area which could be duplication of service. In addition, these limitations can limit the availability of service for low-income individuals who may not be eligible for specialized transportation services.
  - Farebox recovery requirements are impacted by bus passes and Medi-Cal trips. This makes it more challenging to meet FBR ratios. In addition, if you provide a fixed route, there is a mandatory complementary paratransit service that must be provided. These fare box ratios are combined and this lowers the FBR ratio.
  - Limited service hours impacts evening trips and on Sundays.
  - The process for getting approval for medical reimbursement of trips is lengthy and difficult. Passengers must be certified by a physician and the application is eight pages because of past abuse of the services.
- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
- Consider separating funding from Transportation Development Act program.
  - Encourage private transportation providers to make ridership information available. Need to address privacy restrictions on confidentiality of passengers.
  - Streamline the reimbursement process for medical trips and accelerate the authorization of trips.
  - Examine the 5310 requirement for a 20 hour week. Rural communities with smaller populations and longer distances to travel to destinations have difficulty in meeting this requirement.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Request that the California Department on Aging provide information to transit providers regarding transit for persons with disabilities.
- Explore legislation related to seeking potential funding sources from the Department of Health Services (DHS) and other Human Service agencies.
- Create more flexibility in eligibility requirements for riders.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Facilitate monthly meetings with transit providers and human service agencies/organizations. This forum provides an opportunity work on resolving issues.
- Emphasize the development of mobility management programs that one-stop shop of all available transportation within the region and locally. This would help to eliminate duplication and make more efficient use of existing resources. The 211 system could be one means of offering mobility management services. This could be a statewide rural pilot area project. With the 211 system, HIPA requirements are waived because people are calling in for information.
- Encourage participation in coordination meetings by linking funding to attendance at these meetings. The focus would be on human service agencies and other non-transportation agencies/organizations.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

- Funding to allow staff time and the means to participate in these meetings would be helpful. Agencies and organizations have limited funding and it is challenging for them to attend meetings. Meeting with transit providers meet on a monthly basis where they share problems and solutions.

**District 3 Roundtable Discussion Meeting Summary of Key Points**

- 1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies/organizations did participate in the development of the plan in this region. Participation varied from being the lead agency (CTSAs) to active involvement in the focus groups and advisory committees. At least, 4 agencies were CTSAs from District 3.
- 2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**
- Agencies and organizations did develop and submit projects for funding. Projects discussed ranged from providing transportation services for seniors, persons with disabilities, and welfare-to-work recipients. The projects included a dial-a-ride for welfare-to-work recipients in outlying rural areas, a Senior Medicare program for non-emergency medical trips for low income seniors, transportation voucher program, providing accessibility improvements at high-use stops that are not ADA accessible and pedestrian-oriented development. In addition, there is a grant program to develop mobility management services which includes a one-stop call-in center for trip planning, vanpools, for farm laborers, a transit travel training ambassador program and volunteer driver program.
- 3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**
- The rural nature of the service areas creates a significant challenge. Due to long distances traveled and because of the fact that human service clients are spread throughout the area makes it expensive to operate. There are limited local health services and it becomes necessary to travel to other areas. Clients who are in remote areas where the buses will not travel more than a quarter of a mile on most roads.
  - Lack of available funding to implement transportation services. In particular, rural trips are expensive and challenging to fund.
  - Addressing the transportation needs for those individuals under 60 years old. Some may not be eligible for specialized transportation.
  - Helping the frail and elderly with transportation needs.
  - Clients who lack driver licenses due to mental health conditions or court mandated decisions. Limited funding to assist these clients makes it difficult to provide transportation services.
  - One agency said that they do not have a Medi-Cal provider in the area.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency/organization's ability to work with other**

**agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

- In some cases, patients who reside in one county cannot be directly transported to another county for services. Since patients cannot be directly transported to the desired destination, the provider must meet at a set point.
- Limited human services staff creates challenges for burdens on implementing transportation programs. Staff time that is necessary to do research, grant writing, service planning, and funding for programs is difficult to justify given sparse budget resources.
- Due to concerns with liability issues, a government agency has blocked use of potential volunteers to assist with transportation service programs. Labor groups have also opposed the use of volunteers with concerns about lay-offs and the potential loss of additional jobs.
- Meeting farebox recovery ratios is required and difficult to meet. One agency can only accept a donation and not charge a fare. Another said that rural areas face challenges in meeting the farebox recovery ratios.

**5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**

- Medi-Cal eligibility for Public Transit creates an issue when recipients ride for free.
- Balancing road and transit departments given the decline in available resources.
- The planning process is lengthy and that leads to discouragement with interested participants.
- Restrictions on funding from federal and state agencies make it difficult to obtain funding for vehicles through ADA.

**6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**

- Setting up one call referral program could help to address barriers to coordination.
- Developing mobility training for clients who are reticent about using transit services.

- 7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**
  - Educating clients for future planning when they can no longer drive.
- 8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**
- 9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**
  - Create a clearinghouse for general information. Information sharing at the local and regional levels by developing opportunities to meet would be helpful.

#### **District 4 Roundtable Discussion Meeting Summary of Key Points**

- 1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**
  - Agencies and organizations that participated in the development of a Coordination Transportation Plan varied from transportation agencies to a social service agency. Some agencies took a leadership role in preparing the plan while others were active in participating on advisory committees and providing input.
- 2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**
  - Agencies and organizations did develop coordinated for funding. Projects include a wide range of transportation coordination options. These included coordinating service to a college, another for high school students to train and become transit ambassadors and to work with seniors, transferred “retired” paratransit vans to non-profits to provide service for seniors, transit credit ride credits, travel training, bus passes and car maintenance.
  - A regional agency facilitates project development for other agencies/organizations through a mobility management group. The group meets on a monthly basis. They utilize New Freedom funds to encourage coordinated transportation projects.
  - Mobility Management Center that provides coordinated transportation services to a wide range of users including seniors, persons with disabilities and low income

children. This center includes a “multi-program” brokerage that combines social services with transportation technology. They create tools for non-profits to manage their transportation programs.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- Availability of adequate funding resources was an issue raised by many of the participants as well as other related challenges.
- Longevity of the funding process creates uncertainty and funding losses impact the ability to implement programs. Challenges include waiting for guidance from the Federal Transit Administration and the time it takes to distribute the funding. Further, there is a need to reduce the amount of administrative compliance paper work to validate that coordination is occurring.
- Small operators face challenges in managing grants, ensuring that coordination occurs, applying to the proper sectors and reapplying every two years. Funding reductions limit resources for agencies and organizations and impede their capability of implementing transportation coordination programs.
- Create mobility management projects that promote better coordination between transit agencies and regional centers. Information for the user needs to be more accessible and in a format that is appropriate. These could include user-friendly “one-stop” call centers and websites.
- At the local level, internal barriers to coordination consist of working with different departments that may not have a transportation agency focus.
- Duplication of transportation services among various areas and agencies. This occurs due to a lack of communication.

**4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization’s ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

**5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**

- Encourage streetscape and infrastructure planning that is ADA accessible and user-friendly to persons with disabilities, including consideration of audible signals for the vision impaired along transit routes.
- Federal Transit Administration procurement rules create barriers to implementation of coordination projects. This relates to issues of funding and the procurement of vehicles within a three to five year window. Flexibility is needed to ease implementation.

**6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**

- Several responses cited Mobility Management Centers or Programs as a way to better coordinate transportation. For example, coordinating with regional centers and transit agencies to consolidate resources and facilitate transit services for riders could lead to better service. One example that was cited included creating a “one-stop” shop which would include a call center and accompany website that could communicate in simple language for users.
- State may consider communicating with at the Federal Level to examine ways of streamlining the funding process.
- State could address the medical non-emergency transportation reimbursement issue.
- Create Mobility Management Groups to promote better communication and coordination.
- Encourage the development of CTSAs in the Bay Area which could create an additional funding source for mobility management under the Transportation Development Act.
- Transportation Funding is “silo-ed” with transportation agencies. This restricts access by other senior services, employment services, and social services.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Encourage participation among key stakeholders in attending workshops and advisory committees for funding programs.
- Create templates, information on relevant technologies and grant review to assist agencies and organizations with implementing elements of coordination plans. This



could include outreach to public health agencies, schools and the business community. One agency is currently in the process of designing templates and has offered to share them with other interested parties. Related to that cataloguing Best Practices would be helpful.

- Develop local and state standards for liability and legal issues related to vehicle sharing. Vehicle sharing could help meet service gaps between transit agencies. Mobility managers may be able to identify unused resources between different agencies.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- State should support sustainable funding resources and streamline the funding process in the current Surface Transportation Reauthorization legislation before Congress. Agencies and organizations need to have access to sustainable funding sources to maintain programs and a commitment to long-term plans. Streamlining the process could help ease the administrative burden.
- Encourage the development of a network of statewide Mobility Management Centers to implement programs for transit and human service agencies/organizations. Items that could be included are letters of guidance to local agencies that requires coordination.
- Encourage at the Federal level mobility management centers that are able to be inclusive of all different types of customers.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

**District 5 Roundtable Discussion Meeting Summary of Key Points**

**1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies and organizations did play active roles in the development of the coordinated transportation plans for the region. Two agencies were the lead on coordinated plans and a CTSA was very actively involved in working with social service agencies, the community, participating in interviews and helping to develop the Mobility Management Phase of the plan. One respondent is newer to the region and did not participate in the recent planning process.

**2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**

- Many agencies responded that they did develop projects for funding. The CTSA has applied for a grant to fund a social service mobility management position to work with transit providers, agencies, and seniors to identify and work together to meet those gaps. They are also considering taxi service and a senior volunteer program.
- Three CTSA's in the area have similar programs which include the following:
  - Current coordination activities consist of maintenance of vehicles;
  - Driver training, curriculum development;
  - CHP inspection preparation, and emergency response.
- There are regular meetings to discuss coordination issues. There is a social service transit advisory committee (SSTAC) that meets monthly and an interregional transportation committee for health services that discusses issues between counties. The SSTAC committee helped to distribute a transit resource guide that was prepared by one of the regional agencies
- Another organization conducts training programs to help seniors who need education and assistance with utilizing public transportation.
- A 511 call referral service is being considered.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- The CTSA said a challenge was as discussed in the coordinated plan, the need to continue and gather input from the communities within their county.
- Lengthy waiting period to receive funding once an application has been submitted and approved. This delays implementation of the project.

**4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

- Insurance, contracts and liability issues are challenges with coordination. Particularly, when dealing with many other agencies and organizations. Others also indicated that agencies/organizations have separate service contracts and programs which do not allow for rides to be combined.

**5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**

- One agency responded that coordinating with so many different agencies/organizations and services is challenging. There is a risk factor in transporting a client from an outside agency and with some insurance carriers this is an issue.
- Public transportation's services are limited because of limited funding and hours. Other options will be considered such as taxis or shuttle service.
- Parts of San Luis Obispo County have limited service and do not interface effectively with regional service. In other areas there is limited connection between Dial-A-Ride and regional service. Dial-A-Ride has shorter service hours than regional services.
- An agency said that funding in this current climate is the main barrier. Identifying a local match and in particular for operating assistance which is 50 percent is a challenge.
- Need to codify who needs services and why. A concern was raised that sometimes services are not being utilized by those who most need them.

**6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**

- An agency discussed an issue from their transit plan. The plan said that due to the great amount of travel between cities and with multiple agencies involved, that combining providers might be a solution.
- Each agency defines the age of a senior differently. Another agency said that age requirements are being looked at to be consistent.
- A region-wide fare improvement study recommended that for shared fare media. Challenges remain with how to grant discounts to seniors, persons with disabilities and children and how agencies can implement these fares.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Develop a "Best Practices" material that documents unique projects in different communities and funding sources to help inform agencies of creative ideas that could be

implemented in their areas. This could include a template on coordination efforts and/or a website in which information could be accessed with contact information for various programs.

- On-going mobility management support system with meetings by phone or in-person would help to facilitate collaboration.
- Conduct an evaluation of active projects with JARC and New Freedom grouped by category and share with all participants.
- Examine JARC performance measures. Look at JARC's evaluation criteria in terms of estimating the number of job accessed and number of rides. This is a challenge to estimate these projections.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Look at funding to make sure that there is equitable distribution to all types of riders.
- Create opportunities for awareness and education.
- Consider "limited disability individuals" for service.
- The state could consider monitoring mobility management because of the wide-range of projects. Performance measures at this stage are difficult to establish. There should be flexibility that allows the applicant to generate their own indicators based upon an understanding of their specific projects. Once these are established then we can review best practices.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

- Currently one agency conducts quarterly meetings with transportation operators and the Social Service Transportation advisory Committee. When the Mobility Manager is in place, they would like to meet with that person and other key agencies to review recurring themes regarding barriers and meeting the needs of transportation providers.

**District 6 Roundtable Discussion Meeting Summary of Key Points**

**1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- County and regional agencies played leadership roles in preparing coordinated plans in their areas. One agency participant was new to the process and had not played role.

**2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**

- One agency responded that they implemented three projects in rural areas utilizing JARC and New Freedom funds. They are also initiating a mobility training operational grant and using New Freedom funds to develop a parking lot to improve access for persons with disabilities. The area's Long Range Plan has a strategy to incorporate the local CTSA, to create a coordinated plan through-out the entire social service agency network. Another agency has a project with employers to provide service between cities.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- The rural nature of certain areas creates transportation challenges. Kern County's size and diversity means that they have as much as two hours of travel time between areas.
- Limited funding resources have impacted projects. Agencies have "lumped" funds together to help agencies gain capital or coordination projects in one of the cities.

**4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency/organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

- One of the key challenges is insurance liability issues. A regional agency is looking at addressing this issue in the Long Range Metropolitan Plan.

**5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**

- Many social service agencies deal with persons who are severely mentally disabled and cannot access public transportation. These individuals are confined to social service agencies. This impacts the scoring process for grant applications and makes it difficult to compete for funding.
- Agencies that provide service with high numbers persons who utilize wheelchairs are penalized in the scoring process for 5310 grant applications. Costs are higher per trip and this does not measure the service being provided.

- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
- 7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**
  - It would be helpful for the state to examine the scoring criteria for grant applications and allow for the unique needs of specialized transportation.
- 8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**
  - One agency's response was that the future demographics will change as baby boomers age. This will greatly impact social services agencies, transit and point-to-point trips to medical facilities. The allocation of funding will need to be examined as there will be a need for more intensive social services and medical transportation.
- 9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**
  - One agency responded by saying that they support the concept of a grand coordinator that works with all of the social service agencies with one data base with the capability to access all of the resources. They would like to see this implemented through a CTSA or mobility coordinator.
  - An agency talked about their Social Service Transportation Advisory Committee. They have built relationships through the committee and currently meet twice a year and anticipates that they will begin meeting on a quarterly basis.
  - An agency recommended for mobility meetings that sending agendas or executive minutes and follow-up on the meetings to keep everyone updated would be helpful. In addition, Caltrans could provide more information from the Federal Transit Administration and coordinate more closely with the FTA and regional as well local agencies.

#### **District 7 Roundtable Discussion Meeting Summary of Key Points**

- 1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies and organizations participation varied from leadership roles to active involvement in outreach activities and providing input into the coordination plan. These included regional agencies, transportation agencies, social services organizations and CTSAAs.
- 2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**
- Agencies and organizations did develop projects for funding. Projects represented a variety of transportation coordination efforts. These include brokerage services, sub-regional mobility projects, escort assistance program, volunteers to assist frail seniors and persons with disabilities on the bus, dial-a-ride, a transportation information line help with scheduling rides, travel training and discounted bus passes.
  - Other related projects are workshops by the CTSA to help agencies coordinate together and a “retired” vehicle donation program. Another is a proposed 211 call information center. There is also a single number service referral program.
- 3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**
- Lack of funding resources to meet demand. Current and future availability of funding is a major concern. The difficulties that agencies and organizations face in being able to provide the local match for funding.
  - Public transit service that does not cross city boundaries. This also includes limited service hours and limited destinations.
  - Recruiting, training and retaining volunteers for the transportation information call center. In addition, providing these services has limitations in the span of hours of service and response time.
  - A Regional Plan lists gaps in service including hours of operation, ease of access for clients, fixed route schedule, need for variable routes and alternative business hours. There is a need for more mobility management.
  - Delays in funding grants. The federal process is lengthy and state as well as regional agencies have to be responsive to federal requirements such as preparing a Memorandum of Understanding.
  - Human service agencies that are new to applying for transportation grants and need technical assistance.

- Limitations on clients that can be served. One organization can only serve veterans and this is barrier to coordination.
  - Develop regional transit planning websites that covers county lines.
  - Educate decision-makers on the value of coordination. Identify benefits of sharing vehicles as well as service which can lead to costs savings.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency/organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**
    - Agencies that implement coordination programs have administrative burdens and staff time constraints that make it difficult to manage. Mobility managers are needed to coordinate all of these tasks.
  - 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
  - 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
  - 7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**
  - 8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**
    - A clearinghouse operated by Caltrans that provides information on best practices, plans and alternatives.
    - A web-based transportation planning tool that helps with regional integration of services for local and inter-county planning.
  - 9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**



- Create opportunities to fund local, regional and statewide mobility managers to help facilitate coordination.

### **District 8 Roundtable Discussion Meeting Summary of Key Points**

**1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies and organizations actively participated in stakeholder meetings and thereby providing input into the coordination plan. These included regional agencies/organizations, transportation agencies, and social services organizations.

**2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**

- Agencies and organizations did develop projects for funding. Projects in this region included a range of transportation options. One agency has a mobility manager that coordinates bus pass and job assistance programs. Other projects include: transportation reimbursement for volunteer drivers, extended hours for fixed route service, shuttle service for homeless, vanpool for low income individuals, transportation brokerage services for 400,000 member Health Plan and planned projects such as an ambassador program to help clients utilize transit.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- Growth in demand for paratransit services. One agency said they have seen an increase in demand of 66 percent with 40 percent of those riders from Regional Centers. They need to coordinate better with public transportation providers to get “mainstream clients” on fixed route service.
- Lack of available funding to meet demands. An agency anticipates a greater demand for transportation services such as reimbursement for volunteer driver programs.
- Interregional gaps occur when medical trips to facilities are located in other regions. The volunteer driver program has been used because trips can last two hours. The cost of bus passes is a factor as many clients cannot afford them, even when there are discounts. In addition, there may be only two buses that travel to the destination and the return trip can be difficult to coordinate with the physician’s appointment times. A need was expressed for bus passes that would allow for interregional travel

- Develop training programs to help clients utilize transit and fixed route service. Many are unfamiliar with public transit service and need assistance on how to navigate the system.
  - Some public transportation vehicles are not fully utilized. An agency said that we need better coordination to make better use of existing inventory.
  - Seniors have concerns about public transportation in terms of safety, security and safe schedules.
  - Planning of senior communities has resulted in inadequate transportation services. There is a lack of buses and a bus facility that creates transportation-related challenges.
  - Different senior citizens age limitations create confusion for riders. Cities, counties and the region have varying age requirements.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**
- Insurance and liability issues inhibit coordination of services.
- 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
- Some human service agencies have policies that make it challenging to receive outside advice on transportation options and programs.
  - Better coordination on bus routes.
- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
- Pool funds from human service agencies/organizations such as Regional Centers with Transportation Agencies to coordinate transportation to better use resources. Some social service organizations have vehicles that go unused. Dial-A-Ride is widely used for some clients, but social services agencies only contribute the base fare, there needs to be better coordination so that other less expensive transportation options are used.
  - Create interregional transfers or passes to help with public transportation trips.

- Examine vouchers for taxis and Greyhound service as other transportation options.
- Create opportunities to increase mobility managers. Agencies expressed the need for a dedicated staff person devoted solely to mobility management. Mobility managers can maintain relationships with other agencies to better coordinate transportation.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Develop ways to better share information with all providers and social service agencies/organizations through technology. Create a data base to help coordinate transportation services and develop a website with information on current routes, services and agencies. It would include numbers on available seats. Organizations could coordinate with others to place clients on the same bus routes. Google Earth could be another way to improve access to transportation information.
- Examine use of the Amber Alert System as a marketing and educational tool to promote coordination. Utilize the system to get information on transportation benefits and options that are available.
- Create training programs for agencies to provide information to promote independent living for persons with disabilities and seniors.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Better communication to coordinate among transportation agencies and human service agencies.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

- Utilize Roundtable discussions to enhance communication among agencies and organizations. It could be held on a quarterly basis. In addition, workshops on driving safely for seniors would be helpful.

**District 10 Roundtable Discussion Meeting Summary of Key Points**

- 1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies and organizations did indicate their participation in the plan development process. Participation in the coordinated transportation planning process varied from agencies that led the process to those who actively were involved as committee members and provided input.
- 2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**
- Agencies and organizations responded that they developed coordinated projects for funding. An agency responded that they are working on a project with the United Cerebral Palsy and the transit district to develop a coordinated effort between public transportation and human service agencies. This agency also contracts for transportation services; purchases bus passes and conducts contract service to coordinate with RTD on timing and transfers. Other agencies implement travel training programs to train persons with developmental disabilities. They are working on developing a call center to provide transit information through a step-by-step process that is geared toward seniors and persons with disabilities.
- 3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**
- Insurance issues impact coordination efforts. The cost of insurance is an issue when they are moved into the commercial level.
  - Limited staff resources create challenges for agencies. Staff commitments are limited due to frozen budget rates with vendors and other funding limitations.
  - Need for a dedicated staff person to conduct mobility management duties. Lack of funding resources is a challenge.
  - Lack of available funding to implement coordination programs.
  - Being able to identify the match to apply for grant funding. Some agencies and organizations have limited funding resources.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency/organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)**

- 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
  - The TDA statutes regarding farebox recovery for small operators and other performance measures makes the dollar important as it relates to coordination. Ratios impact specialized transportation trips.
  
- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
  - Consider the benefits of pooling resources by coordinating.
  - Mobility training can be a cost savings tool that allows funds to be used elsewhere. They would rather spend their funds on a monthly bus passes than hundreds of thousands of dollars on contracted transportation service.
  - Implement fund sharing agreements which might help with community farebox requirements for all agencies.
  - Sharing information and working with other agencies to coordinate.
  
- 7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**
  - Create a statewide uniform goals that are readily available and on the Caltrans website. Those involved in coordination efforts can focus on these goals.
  - Develop a one-stop shop of information on coordination issues such as insurance.
  - Create partial funding for employees that would enable staff to attend monthly coordination meetings.
  - Provide education on funding opportunities.
  
- 8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Place higher priorities on projects that are directly linked to legislation and provide incentives such as reducing the match share for grants.
- Conduct on-going Roundtable meetings to share information.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

- Networking with providers and understanding the purpose of their transportation programs.

**District 11 Roundtable Discussion Meeting Summary of Key Points**

**1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?**

- Agencies and organizations participation varied from leading the planning effort to active involvement in providing input. Participants assisted with outreach for the coordinated plan. Organizations attended outreach meetings. Regional agencies, transportation agencies, social services organizations participated in the planning process.

**2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.**

Agencies and organizations have developed a variety of coordination projects. These projects consist of coordinated driver training, wheelchair accessible buses, sharing vehicles and working on a shared maintenance facility. There is a pilot project being developed to create a 24-hour maintenance shop with a consolidated fleet. They anticipate significant costs savings. Some agencies are using paratransit “retired” vehicles. Other agency projects included a Bus Stop Accessibility Travel Program.

The lead agency said they have leveraged the coordinated plan as a way to dedicate resources to social services, transportation and research in understanding needs. The plan is unique in merging with performance measures that are required in the JARC and New Freedom funding programs.

**3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?**

- An agency said that one of biggest challenges was to ensure that other agencies were aware of the transportation resources regarding inventory and what services users most want enhanced.

- Insurance costs and liability issues are a deterrent to coordination. Agencies and organizations face high insurance premiums and liability concerns. It would be helpful to conduct research into whether actuarial risks related to coordination of transportation are justified, in addition to the blanket approach by insurance companies regarding insurance and potential mechanisms that might address these issues. Also, for health organizations their insurance policies are a group policy and not specific to automobile coverage.
  - Understanding the funding application process. Assistance with information would be helpful.
  - Managing transportation services that are shared among different agencies and there is a blending of the client pool. Comments included the importance of maintaining the specialized needs of clients.
  - Agencies have high administrative demands that create challenges in allocating time and resources. An agency discussed managing 19 different contracts. A potential approach would be to have a sole source contract through Area Agencies on Aging or a CTSA.
  - Some agencies fear losing clientele and may be reluctant to coordinate.
- 4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency/organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding, etc.)**
- 5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)**
- Funding is the greatest barrier to coordination. Lack of resources and budget reductions increase the importance of funding opportunities.
- 6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?**
- Create a fund where year-end funding balances could be placed into and used later for the match required by grant applications.
  - Sharing resources can lead to cost savings
  - Explore why more CTSA's have not been established.

**7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?**

- Create a central database for ADA eligibility that would be available to CTSAs or transportations brokerage agencies through-out the state. The database could help to understand the rider.
- Establishing statewide priorities could help regional and local agencies learn about new strategies that may be applicable to their own areas. Linking regional objectives that arise from social service coordination of transportation could create a nexus with the state and lead to exploring a broader level of research.
- Develop a statewide insurance umbrella program.
- Include in funding criteria additional incentives or evaluation points for tasks that focus on coordination.
- Prepare an informational tool based upon the TCRP Report 101 which provides information on the costs savings that can be realized through coordination.
- Create a pool of funding for non-profits at the state level for operational budgets. This would include a predetermined shelf life and evaluation of the applicants.

**8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?**

- Consider ways to assist social services agencies and organizations with the transportation challenges of transporting persons with behavioral disabilities.

**9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?**

**Key Stakeholder Roundtable Recommendations**

Key stakeholder recommendations relative to development of statewide priorities are summarized below:

- Review and consider TDA farebox requirements which impact coordination and providing service in rural areas.



- Mitigate the lengthy state process to obtain approval for reimbursement of transportation providers who offer trips to Medi-Cal recipients. Streamline the reimbursement process for medical trips and accelerate the authorization of trips.
- Limit restrictions on specialized transportation to allow public transit riders to utilize these services, which may assist in eliminating service duplication.
- Examine the 5310 requirement for a 20 hour week. Rural communities with smaller populations and longer distances to travel to destinations have difficulty in meeting this requirement
- Facilitate monthly meetings with transit providers and human service agencies/organizations, as this forum provides an opportunity work on resolving issues between agencies and organizations.
- Emphasize the development of mobility management programs. This would help to eliminate duplication and make more efficient use of existing resources. The 211 system could be one means of offering mobility management services.
- Create templates, provide information on relevant technologies and grant review to assist agencies and organizations with implementing elements of coordination plans. This could include outreach to public health agencies, schools and the business community.
- Develop local and state standards for liability and legal issues related to vehicle sharing. Vehicle sharing could help meet service gaps between transit agencies.
- It would be helpful for the state to examine the scoring criteria for grant applications and allow for the unique needs of specialized transportation.
- Project performance measures are difficult to establish. There should be flexibility in the funding process which allows the applicant to generate their own indicators based upon an understanding of their specific projects. Once these are established then we can review best practices.
- Develop “Best Practices” material that documents unique projects in different communities and funding sources to help inform agencies of creative ideas that could be implemented in their areas. This could include a template on coordination efforts and/or a website in which information could be accessed with contact information for various programs.
- Create a fund where year-end funding balances could be placed into and used later for the match required by grant applications.

**Stakeholder Interview Questionnaire**  
**Mobility Action Plan (MAP) Phase I Implementation Study**

**A. Agency/Organization Roles/Responsibilities Relative to Transportation** *(one or more responses may be provided)*

1. Does your agency/organization directly operate or contract for transportation services? Yes/No

1a. \_\_\_\_\_

2. Does your agency/organization arrange for transportation for your customers/clients? Yes/No

2a. \_\_\_\_\_

3. Does your agency/organization offer referrals for your customers/clients to available transportation resources? Yes/No

3a. \_\_\_\_\_

4. Does your agency/organization subsidize transportation for your customers/clients? Yes/No

4a. \_\_\_\_\_

**B. Funding Sources Used By Agencies/Organizations for Transportation**

5. Does your agency/organization receive Federal, State or other funding for transportation purposes? Yes/No

5a. If yes, what specific funding does your agency/organization receive?

\_\_\_\_\_

5b. For what purposes are these funds used relative to transportation?

\_\_\_\_\_

**C. Agency/Organization Understanding and/or Participation in Coordinated Transportation Projects**

5. Is your agency/organization familiar with the purpose and/or requirements of Job Access and Reverse Commute (JARC) and New Freedom (NF) funding programs? Yes/No

*(If No, interviewer to provide brief overview of Caltrans JARC and NF funding program. **SKIP TO QUESTION #10** and distribute funding information via electronic mail)*

6a. If yes, did your agency/organization participate in the funding process for JARC and New Freedom funding in your region?

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6b. If not, why not?

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6c. If yes, was your agency/organization awarded project funding under one or both of these programs?

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6d. If so, what types of projects were funded?

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**D. Perspectives on Progress of Regional Coordination Efforts thus far; Suggestions for improvement**

6. To your knowledge, was your agency/organization involved in the stakeholder involvement process for developing the Public Transit – Human Service Coordinated Transportation Plan in your region? Yes/No

7a. If not, why not?

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7b. If yes, has development of the Coordinated Transportation Plan in your region, and the associated stakeholder involvement efforts been successful in promoting and encouraging coordination between public transit and human service agencies and organizations? Yes/No

7c.

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7d. What ideas do you have about additional support that could be provided to regional agencies and organizations to assist them in local coordination efforts?

**E. Recognized Barriers, Policies and Practices that Inhibit Coordination and Suggestions on How to Mitigate these Issues**

7. Are you aware of existing internal or external policies or barriers that limit and/or prohibit your agency/organization's opportunities to work with other organizations and agencies to develop new coordinated transportation projects? Yes/No

8a.

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8. Are you aware of local or regional coordination policies not currently being enforced? Yes/No

9a.

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9. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?

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## F. Understanding of Mobility Management

10. Do you or anyone in your agency have an understanding or familiarity with the Coordination term "Mobility Management?" Yes/No

11a. If so, has your agency proposed or implemented coordinated projects that include a mobility management element? Yes/no  
*(If no, interviewer to provide information via electronic mail.)*

11b.

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11. Are you familiar with Consolidated Transportation Services Agencies (CTSA's)? Yes/No

12a. If Yes have you worked with a CTSA on any coordinated planning efforts? Yes/No

12b.

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## G. Ideas for Improving Communications Between Public Transit and Human Service Agencies and Organizations

12. In your view, what steps can be taken to encourage communications and relationship building between public transit and human service agencies and organizations at the local level?

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## H. Regional Perspectives on Priorities designed to facilitate coordination of Transportation through a State-Wide Strategic Plan

13. What elements do you believe should be considered and/or included in development of statewide priorities for Coordination of Transportation opportunities between public transit and human services?

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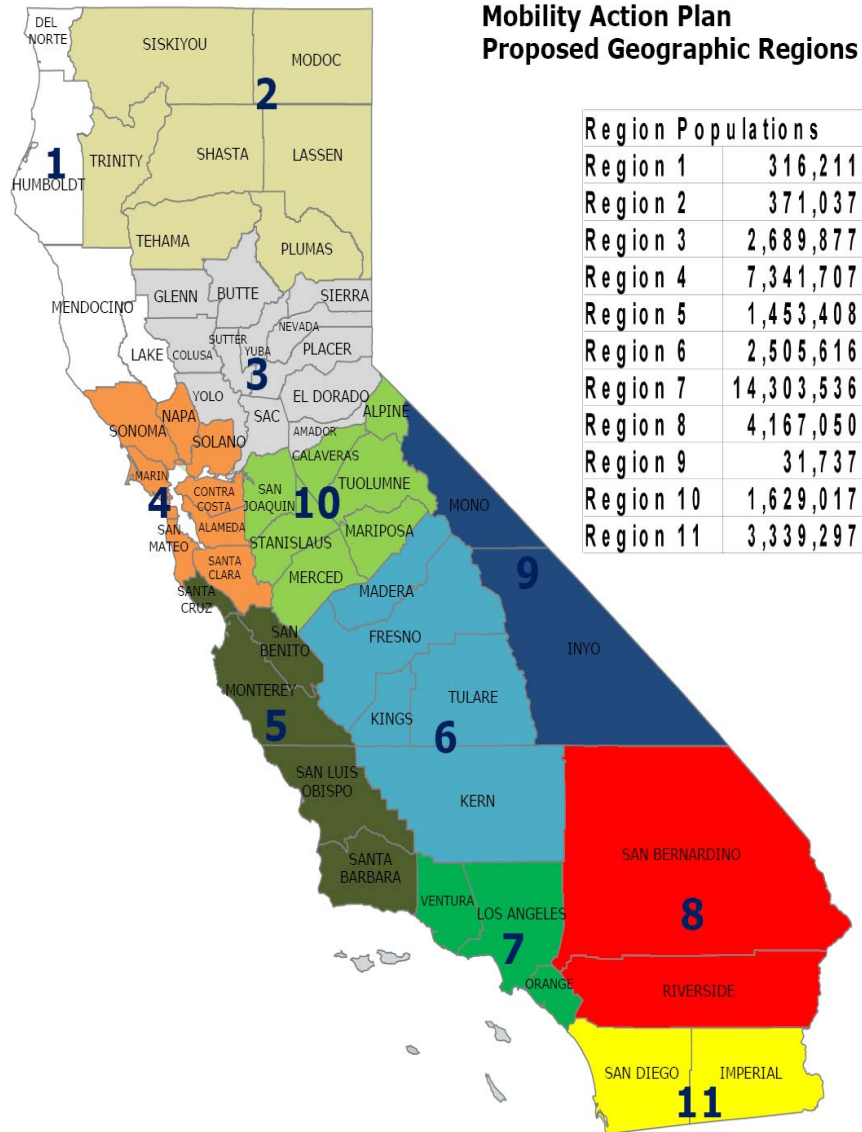
*Thank You for Your Participation. We Value Your Input.*

Rev June 15, 2009

**List of Stakeholder Agencies and Organizations Interviewed**

AARP California
Access Services Inc.
Access to Independence
Aging & Independence Services (ADA)
Amador Regional Transit District (ARTS) and (ACTC)
Association of Monterey Bay Area Governments
Butte County Association of Governments
Calaveras COG
California Association for Coordinated Transportation
California Commission on Aging
California Department of Aging (CDA)
California Department of Public Health
California Highway Patrol
California Senior Advocates League
Californians for Disability Rights, Inc.
Del Norte Local Transportation Commission
Department of Developmental Services
Department of Motor Vehicles
Department of Social Services
East Los Angeles Regional Center
Elderly and Disabled Advisory Committee
Far Northern Regional Center
Freed Center for Independent Living
FTA Region IX
Full Access and Coordinated Transportation (FACT)
Inyo-Mono Association for the Handicapped
Leisure World Bus Committee
Madera County Transportation Commission
Mendocino Council of Governments - Lake County/City Area Planning Council
Metropolitan Transportation Commission
Monterey-Salinas Transit District
Nevada County Transportation Commission
North County Transit District
Norwalk Transit
Orange County Transportation Authority
Outreach – Santa Clara County
Partnership With Industry
Paul Branson
Ride-On Transportation
San Diego Association of Governments
San Joaquin Council of Governments
San Joaquin Regional Transit District (RTD)
San Luis Obispo Council of Governments
Seniors Council of Santa Cruz and San Benito Counties
Shasta County Opportunity Center
Shasta County Regional Transportation Planning Agency
Shasta Senior Nutrition Programs
South County Senior Services
Stanford University School of Medicine
State Independent Living Council (SILC)
Tehama County Transportation Commission and Transit Agency Board
The County Connection (CCCTA)
Western Contra Costa Transit Authority
Whistlestop Wheels

MAP Study Geographic Regions



### Roundtable Discussion Meeting Questions

1. Did your agency/organization play a role in or participate in the development of the Public Transit - Human Service Coordinated Transportation Plan in your region?
2. Has your agency/organization had opportunities to create and/or develop coordinated transportation projects or programs that involve both public transit and human services? If so, please share your experiences.
3. What types of challenges has your agency/organization faced (e.g. internal or external situations) in development of coordinated transportation projects? What solutions have you developed to address issues?
4. Are you aware of any existing internal policies or barriers that may limit and/or prohibit your agency /organization's ability to work with other agencies/organizations on coordinated transportation projects? (e.g., lack of management support, insurance and liability issues, funding. etc.)
5. Are you aware of external local or regional policies developed by transportation of health and human services agencies or organizations that are not effective in promoting coordination and/or are not currently being enforced? (e.g. limited service operating hours between local jurisdictions, variances in service eligibility requirements in neighboring cities etc.)
6. What suggestions do you have that would be useful in addressing or eliminating these barriers to coordination?
7. Do you have any ideas about additional support or tools that could be provided to regional agencies and organizations by the State to further assist stakeholders in local coordination efforts?
8. What elements do you believe should be considered and/or included in development of statewide priorities for coordination of transportation opportunities between public transit and human services?
9. In your view what steps can be taken to encourage communications and build relationships between public transit and human services agencies and organizations at the local level?