

San Francisco County Transportation Authority

# **Bayview Hunters Point Mobility Solutions Study**

## **FINAL REPORT**



**February 28, 2013**



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# **PART A**

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## Introduction



## OVERVIEW OF CALTRANS ENVIRONMENTAL JUSTICE TRANSPORTATION PLANNING GRANT

The San Francisco County Transportation Authority received a 2-year Caltrans Environmental Justice Transportation Planning Grant in 2011. This final report is the final deliverable for this grant and incorporates all outstanding deliverables. With this final report, this grant is considered complete.

The primary goal of this planning process has been to develop a Business Plan that will guide the launch of a community-based transportation program that will enhance mobility in the Bayview Hunters Point neighborhood of San Francisco. The refined Business Plan, included as Part B, is the heart of this report. The report also incorporates all other grant deliverables such as documentation of the development of the Plan, community involvement in Plan development and other relevant background and analyses that informed the Plan.

The version of the Business Plan that is contained here has been refined from the Draft Business Plan, but should not be considered “Final.” This Business Plan is a living document that is owned by the community and will continue to evolve and change to meet the community’s needs over time.

## FINAL REPORT ORGANIZATION

This report has two main parts described here; the Caltrans Grant Tasks that are related to each indicated in parentheses:

- Part B: Background and History, including:
  - Formation of the Community Transportation Working Group and Study Team (Task 1.1-1.2)
  - Summary of results of the CBO/Service Provider Survey (Task 2.1)
  - Overview of potential service models and Working Group decisions on service models (Task 2.2)
  - Documentation of previous studies and planning efforts (Task 5.1)
  - Documentation of stakeholder involvement (Task 5.1)
- Part C: Business Plan (Task 3.1, 3.4) including:
  - Programmatic and operational parameters of the planned community-based transportation program (Task 3.2)
  - Legal and institutional arrangements, funding and insurance models, and other operational parameters of the planned community-based transportation program (Task 3.3)
  - Overview of steps to develop organizational and administrator agreements and/or MOUs and marketing materials (Task 4.1-4.3)
  - Evaluation Plan (Task 5.2)

## OVERVIEW OF GRANT DELIVERABLES

Please find a list of all grant deliverables in the figure below with an indication of completion or a “map” to where in this Final Report the deliverable can be found.

**BAYVIEW HUNTERS POINT MOBILITY STUDY FINAL REPORT**  
Part A: Introduction

**Table A-1 Grant Deliverables**

| Deliverable   | Documentation  | Progress                                     |
|---|--|--|
| <b>TASK 1. PROJECT STARTUP</b>                      |  |  |
| Establish Working Group                             | Kickoff meeting agenda and notes                                 | COMPLETED<br>Summarized in Part B            |
| Identify consultant team                            | Signed contract(s) / Task Order(s)                               | COMPLETED                                    |
| Refine workplan                                     | Detailed workplan  | COMPLETED                                    |
| Develop Stakeholder Involvement Plan                | Community Involvement Plan                                       | Appendix D                                   |
| <b>TASK 2. FEASIBILITY AND FUNCTIONAL ANALYSIS</b>  |  |  |
| Conduct survey and analyze results                  | Technical memo regarding survey findings                         | COMPLETED<br>Summarized in Part B            |
| Complete Functional Analysis                        | Technical memo regarding potential programs                      | COMPLETED<br>Summarized in Part B            |
| <b>TASK 3. BUSINESS PLAN DEVELOPMENT</b>            |  |  |
| Develop draft Business Plan                         | Draft Business Plan  | Part C                                       |
| Refine Business Plan                                | Refined Business Plan  |  |
| <b>TASK 4. PRE-IMPLEMENTATION ACTIVITIES</b>        |  |  |
| Develop organizational agreements                   | Draft MOU(s)   | Described in Part C                          |
| Develop administrator documents                     | Operating plan; draft Contractual materials                      |  |
| Develop marketing materials                         | Program collateral materials (e.g., brochure, member guide, etc. |  |
| <b>TASK 5. FINAL DOCUMENTATION AND STUDY REPORT</b> |  |  |
| Develop Final Report                                | Final Report   | Parts B & C                                  |
| Develop Evaluation Plan                             | Evaluation Plan  | Part C                                       |
| <b>TASK 6. PROJECT ADMINISTRATION</b>               |  |  |
| Manage and administer the project                   | Task Orders/Invoices   | Final invoice to be submitted within 60 days |
| Document ongoing study progress                     | Quarterly Progress Reports                                       | See final progress report attached           |

## **PART B**

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### Background & History



## OVERVIEW

Although vehicle ownership is relatively high within Bayview Hunters Point (as compared to San Francisco as a whole), residents, students, and workers with limited access to automobiles frequently face significant transportation barriers. Mobility is impaired for various reasons, but key factors include: limited public transportation service beyond the Third Street corridor; challenging topography; public safety concerns; the expense of transit fares and vehicle ownership; the absence of direct regional transit access within the community; and other issues. In particular, transportation barriers affect vulnerable and underserved populations within BVHP including youth, seniors, public housing residents and persons with disabilities.

Within the existing context, various ad hoc and community-based strategies have sought to fill transportation gaps. These include such approaches as: carpooling and chauffeuring (giving passengers a ride); a “shopper shuttle” connecting seniors and paratransit riders to grocery stores; the use of vans and buses owned and operated by community-based organizations (CBOs) and social service agencies to serve specific clients populations for specific programs; the operation of a limited-frequency, fixed-route shuttle serving health-related destination and other, often informal strategies.

The *Bayview Hunters Point Neighborhood Transportation Plan*, completed in June 2010 was a community-based transportation planning study led by the San Francisco County Transportation Authority (Authority) in collaboration with community residents, stakeholder groups, neighborhood leaders, and CBOs. To engage the community organizations in the area, the Authority worked closely with local churches, community groups and the Office of the Public Defender’s Bayview MAGIC (BMAGIC) which provides umbrella coordination services for many non-profit organizations working in the areas. Among the key recommendations of this effort were to undertake a focused, in-depth technical and community study to advance a community-based pilot program concept for implementation; specifically to further explore the possibility of a vehicle-sharing collaborative and volunteer driver program, including preparation of a business plan.

In 2011, the Authority received an \$180,000 Environmental Justice transportation planning grant from Caltrans to work on the Bayview Hunters Point Mobility Solutions Study (Study). A Prop K appropriation (Resolution-11-23) provided the required \$20,000 in local match. A Study Team was formed consisting of Authority staff and consultants to undertake the present Mobility Study. Throughout the Study, the Team has worked closely with a group of community-based organizations that was convened by BMAGIC and which has since expanded to include those participating in the Department of Public Health’s (DPH’s) Bayview Healthy Eating Active Living (HEAL) Zone Program,<sup>1</sup> who had in parallel and independently identified transportation access as a critical barrier to program effectiveness.

Working in partnership with DPH and the Department of Children, Youth and their Families, the Study Team has conducted a needs assessment of CBOs’ program access needs and a review of

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<sup>1</sup> The HEAL Zone is one of the Shape Up SF Projects, partially funded by Kaiser Permanente. The goal of the HEAL Zone Project is to help Bayview Hunters Point (BVHP) residents eat better and move more in places where they live, work, and play. The HEAL Zone will work with different organizations and businesses in the Bayview to help BVHP resident eat fewer calories, Eat more fruits and vegetables and get more active. Transportation barriers and issues were a recurring theme in the HEAL Zone’s needs assessment, making the project a natural partner for the BVHP Mobility Study. More information on the HEAL Zone can be found at <http://www.sfgov3.org/index.aspx?page=3254>

their transportation operations and resources. A Transportation Working Group composed of 18 representatives from CBOs and interested community leaders was formed to consider alternative service models and guide the development of a community-based approach to addressing transportation needs in the community. They confirmed the desire to pilot vehicle-sharing and the need to grow a mobility management capacity, as well as interest in an eventual volunteer driver program.

The Study Team has been working with the Transportation Working Group since summer 2012 to create a business plan for the pilot. The Study effort also included a Vehicle-Sharing Peer Review Workshop at which Working Group members learned from other communities that were actively engaged in vehicle sharing programs.

This Part of the Mobility Solutions Study Final Report describes the background and history of the Bayview Hunters Point Community-Based Mobility Project. It includes:

- A summary of previous planning efforts and their findings, many of which provided the genesis for the Bayview Hunters Point Mobility Solutions Study
- An inventory of existing transportation resources in the Bayview, including a summary of the results of the needs assessment and survey of community-based organizations and service providers
- An overview of the Transportation Working Group formation and key outcomes

## **PREVIOUS PLANNING EFFORTS**

The central role of transportation access in community health, particularly within Bayview Hunters Point, has been highlighted repeatedly in recent planning efforts and needs assessments that have been conducted in this neighborhood. These analyses have specifically identified the desire and potential to develop collaborative, partnership-based strategies to address transportation gaps in the community. Relevant studies include:

- The 2009 BMAGIC Landscape Analysis
- The Transportation Authority's 2010 Bayview Hunters Point Neighborhood Transportation Plan
- DCYF's 2011 Community Needs Assessment

A brief summary of the findings and recommendations of each of these plans is included in Appendix A.

## **Key Themes & Recommendations from Past Planning Efforts**

The primary themes and recommendations that emerged from previous planning efforts are:

- Travel to and within Bayview Hunters Point (BVHP or the Bayview) without a personal automobile is difficult.
- The two key barriers to mobility in BVHP are safety and reliability. Public safety is a major concern for seniors and youth, both in access to transit (i.e. walking to stops, waiting at stops) and while riding transit (i.e. on board transit vehicles). While the Bayview is served by the T-Third light rail line and several crosstown bus routes, and while much of the area is walkable with relatively flat streets and wide sidewalks, real and perceived safety concerns on the streets and on transit are formidable obstacles to use.

- Public transportation in BVHP is relatively infrequent, especially beyond the Third Street corridor. Transit service is also subject to reliability issues, and travel via transit typically requires multiple transfers to reach key destinations. Routes are circuitous and indirect, resulting in lengthy and inefficient travel times.
- There are no regional transit hubs in BVHP.
- Private cab service as well as paratransit is deemed unreliable, too cumbersome or too expensive for many residents. Taxi operators are often reluctant to serve some or all of the neighborhood. Completion of eligibility paperwork for paratransit is too complicated for some potentially eligible riders, and there are sizeable population groups within the Bayview who do not qualify for paratransit, yet whose travel needs are not effectively met through existing transit services. Having to make advance reservations (as required by paratransit) is not practical for many trips.
- Several CBOs operate their own vehicles and transportation service or rely on employees to drive their personal vehicles; other organizations have no direct access to transportation services for their clientele.
- There is considerable interest in resource-sharing and coordination in ways that may fill some of the gaps and better meet the transportation needs of the community in a more holistic, organized, and cost effective manner.
- There is consensus that community transportation services should focus on the needs of those with no or limited access to automobiles, where there is potential for near and midterm improvement, and where such services would not duplicate existing services. The two markets prioritized for further study and analysis were youth and seniors.

These themes and recommendations from prior plans provided the basis for this Study effort and development of the Business Plan.

## **EXISTING CONDITIONS AND NEEDS ASSESSMENT**

The Study undertook an assessment of existing transportation resources and services through community and agency stakeholder interviews. The results indicate that, in addition to SFMTA transit service, there are a significant number of existing transportation services in the Bayview. However these services are not coordinated and therefore the resulting service is not optimally efficient and is more expensive than necessary on an hourly and per trip basis. A brief summary of existing community transportation resources follows.

### **Existing Private Transportation Services in the Bayview**

#### **Community Based Organizations (CBOs)**

Many CBOs, particularly those serving youth, have responded to the unique attributes of the Bayview Hunters Point community by taking on the responsibility of transporting their clients to and from programs. The rationale for these services is influenced by the following factors: some program sites are not easily walkable from schools or homes (e.g., Willie Mays Boys & Girls Club is located on top of a steep hill); safety issues when traveling between home/school and the program site; the availability, cost, and travel time involved when utilizing Muni service. It is worth noting that in many cases, the high level of transportation services by these CBOs is not typical even by the same organizations in other neighborhoods.

## **Churches**

In addition to fleets operated by many CBOs, multiple churches in the Bayview have at least one van used for church activities. The initial assessment did not comprehensively review the needs and resources of faith-based organizations.

## **Informal Peer Driver Network**

Unmet needs are frequently met in the Bayview, as in most communities, by an unofficial cadre of volunteers of friends, family, and neighbors who provide transportation and escort services informally.

## **Private Company Shuttles**

New developments near BVHP, such as at Executive Park, have funded their own shuttle services to link residents to key destinations such as BART and Caltrain stations.

## **Agency Funding**

The San Francisco Departments of Public Health (DPH), Children, Youth, and their Families (DCYF), and Aging and Adult Services (DAAS), the Authority, and others have made and are currently making investments in transportation services in the Bayview both directly and indirectly.

## **Previous Community Shuttle Effort: The Bayview Community Health Shuttle**

Although not currently in operation, the Bayview Community Health Shuttle operated in the Bayview from 2008 to 2012 through initial funding by the Lifeline Transportation Program (MTC). The shuttle, which was to operate a 16-passenger bus service hourly between health and medical centers in the Bayview and two nearby hospitals, changed service from its original operating model. Routes and schedule changes were made and a second bus was added to provide “demand response” service at certain times of day. Due to the complexity of the operation and the many stakeholders involved, communications with key health provider partners and maintaining service reliability proved challenging, as was raising awareness with community and health stakeholders. Quarterly reports indicated lower ridership than was anticipated or desired.

The Bayview Community Health Shuttle received funding for all aspects of service and was operated as a separate and single focus business entity by the Bayview Hunters Point Foundation for Community Improvement. Through the Department of Public Health, the Foundation received \$172,000 annually to operate the service, including labor, vehicles and maintenance, fuel, management, and insurance. The service was provided by an outside contractor who supplied all labor and vehicle related services, and was managed by the Foundation.

## **Needs Assessment: Survey of Community-Based Organizations & Service Providers**

In the spring of 2011, the Study Team conducted a needs assessment, including a survey of six agencies that currently (or recently) provided transportation service in the Bayview. The focus of the survey was primarily to assess costs for current service provision. The agencies surveyed were:

1. Willie Mays Boys & Girls Club
2. Bayview Hunters Point YMCA
3. Bayview Hunters Point Family Agency
4. Brothers Against Guns
5. BVHP Health and Environmental Resource Center (HERC)
6. Bayview Hunters Point Foundation for Community Improvement (Operator of the Community Health Shuttle described previously)

The analysis included here is based on information provided by each agency; however none of the agencies currently maintains unified tracking of all of the costs associated with providing transportation services. Therefore, in some cases, a “low” and a “high” cost were estimated.

Cumulatively, these organizations spend between \$596,000 and \$685,000 a year providing service. Drivers account for the largest expense (nearly 50%), followed by vehicles and maintenance, fuel, and then management and insurance. Table 1 aggregates transportation-related costs for agencies interviewed excluding the Bay View Hunters Point Foundation, which receives separate, dedicated funding to provide shuttle service.

Table B-1 Summary of Current Transportation-Related Costs for CBOs

| Description              | Low Estimate | High Estimate |
|--------------------------|--------------|---------------|
| Drivers                  | \$245,000    | \$299,000     |
| Vehicles, Maintenance    | \$85,000     | \$107,000     |
| Fuel                     | \$72,000     | \$72,000      |
| Management and Insurance | \$24,000     | \$36,000      |
| Total                    | \$426,000    | \$514,000     |

Collectively these six agencies deliver the following:

- Operate between 43,000 and 65,000 miles per year,
- Provide between 8,100 and 9,850 hours of service to the community, and
- Provide between 29,200 and 47,200 passenger trips.

Their average cost per hour ranges from a low of \$53 to a high of \$80, and costs per trip range \$9-\$18 . There is significant duplication both in need and actual service among the agencies. For example, several agencies pick school-aged children up from the same schools to attend after-school programs between 2:30pm and 4:00pm and then take the same youth home between 6:30pm and 7:30pm. Similarly, youth-serving agencies regularly schedule field trips, often to similar destinations.

While transportation is critical to both program participation and success for every agency interviewed, including those who do not operate any transportation services, it is not part of any agency's core mission or competence. In most cases, providing transportation service is at the expense of having staff available to provide core programming and services.

The Study Team conducted an analysis of these programs using the above information from the programs and some industry standard calculations to determine cost break-downs. The results of the analysis indicate:

- Professional staff are driving between one and four hours per day, reducing the time they are available for actual programs significantly.
  - Hourly labor rates for staff drivers ranges from \$12 to \$25 per hour, excluding benefits.
- Other high-level professionals are engaged in the ongoing management/oversight and administration of transportation services, ranging from 20 to 60 minutes per day.
- The use of replacement drivers, when the usual staff member is unavailable, can cause disruptions to other program staff and reductions in staff availability for programs.
- When vans are unavailable due to maintenance issues, programs suffer.
- While most of the youth-serving CBOs use 15-passenger vans, these fleets are not necessarily "right-sized." The removal of three seats to circumvent the California Department of Motor Vehicles requirement to hire a commercially licensed driver instantly reduces capacity by 20% system-wide. This underperformance makes the vans inefficient and more costly than either utilizing smaller vehicles which are more economical to buy, maintain, and operate; or taking advantage of operating at full capacity.
- Trips are inefficient, with vans picking up partial loads at each school and making duplicative trips into the community. Likewise, vans are often used for trips that could be made more economically in an automobile (i.e., case management trips).
- Several of the vans will be nearing the end of their life cycle soon.
- Vans are not large enough to be used efficiently on most field trips.

This analysis of existing transportation services was important for development of the Business Plan; the eventual pilot proposed in Part C was designed to enable agencies to get the same service for lower cost or more service hours for the same costs.

## **Guiding Principles from Stakeholder Engagement and Needs Assessment**

A number of themes and priorities emerged from these initial organizational interviews and surveys, they are listed below. These themes formed the basis for the goals for the proposed pilot and informed the elements critical to pilot design; these are articulated in Chapter 2.

- Any new program or service must address a key issue or need expressed by the community.
- Collaborations must be an effective use of valuable staff time and resources for participants.
- Programs or service must serve more customers in the Bayview (and/or a greater geographic base).

- Programs or services must provide professional service standards, performance and financial accountability, and management to participants and partners.
- Any program involving cost-sharing should reduce costs for participating partners.
- Programs should increase coordination opportunities among partners and reduce duplication.
- Programs should improve operating efficiencies such as cost-per-mile, cost-per-passenger.
- Programs should have widespread marketing support to build awareness.
- Programs should be designed to achieve sustainability.
- Programs should address multiple policy goals (such as coordinating social, health, educational services) in ways that support more holistic outcomes.
- Programs must be able to be implemented within a relatively short timeframe as pilots or demonstration projects with strong conceptual and operational support for the program from partners but potentially reduced financial burden on participating CBOs community partners for the pilot period.

## **TRANSPORTATION WORKING GROUP**

In August 2012, the Study Team invited members of community-based organizations who had previously participated in the Authority's BVHP Mobility Study, members of the HEAL Zone initiative, and other leading community representatives to form a Transportation Working Group (TWG). The purpose of the TWG was twofold: (1) Short term, the group was charged with helping to develop a Business Plan for a pilot transportation program which will address priority community access and mobility needs that support improved health and wellness in the Bayview; (2) Longer term, the pilot program and Business Plan will inform new models of service delivery that can be implemented and scaled sustainably in both the Bayview and other districts of San Francisco.

A general presentation was made at the August 2012 BMAGIC Convener meeting to over 25 attendees. During this meeting, the overall goals of the collaborative effort were articulated, as well as an ambitious meeting schedule with topics to move the Business Plan process forward over a six month period. Specifically, the group was charged with the following outcomes:

1. Setting overall service goals and targets
2. Recommending specific programmatic components and service models
3. Establishing guiding principles and general operational requirements
4. Consensus on inter-organizational arrangements and governance
5. Addressing liability and insurance provisions
6. Approving a Business Plan which outlines a pilot program

Most members signed an official MOU to memorialize their level of interest, their commitment to attend monthly meetings, keep their respective leaders informed, and participate throughout the process as needed (a copy of the MOU is included in Appendix B). Members of the Working Group have been fully engaged since the first meeting in September. Every session has been well-attended, discussion has been lively, robust and productive. Consensus-decisions were reached in prioritizing benefits, selecting the types of trips to be provided, and defining key operational and

organizational elements for a pilot program (see Appendix B for a summary of TWG meeting outcomes).

In total, 18 individuals served on the Transportation Working Group representing the following organizations:

- A. Philip Randolph Institute
- BMAGIC
- Black Coalition on AIDS
- San Francisco United School District
- Southeast Health Center
- Bayview Hunters Point Multipurpose Senior Services
- HOPE SF
- SEFA Food Guardians
- Bayview Health and Wellness Clinic
- Bayview YMCA and City of Dreams

A full roster of TWG members is included in Appendix B.

## **Peer Case Studies and Vehicle Sharing Workshop**

Case studies were presented to the Working Group. These drew on longstanding, successful programs in operation around the United States which provide similar types of trips to constituents as those prioritized by the Bayview Transportation Working Group. Case studies included:

1. Santa Barbara's Easy Lift charter services and vehicle sharing program
2. Napa Transit's loaner vehicle program
3. Transportation Management Agency's/Organizations (TMAs and TMOs) and other organizations providing specialty transportation services to youth and seniors
4. Emeryville's 8 to Go senior/disabled van service
5. Beverly Foundation's templates for volunteer driver programs
6. Pasadena's PASS Ride volunteer driver program
7. Car-sharing business models
8. Independent Transportation Network's volunteer driver programs

In February the Study team also hosted a Vehicle-Sharing Workshop that included a morning panel with speakers from San Mateo, CA; Portland, OR; and Napa County, CA sharing their experiences launching and managing vehicle-sharing programs. The afternoon featured an interactive discussion among the panel and Transportation Working Group members. The Working Group sought specific advice and feedback on the Business Plan. The Working Group expressed the importance of understanding conditions unique to the Bayview including community disparities, severely disadvantaged populations and a legacy of broken promises and unimplemented plans. Following the workshop, members of the study team also met with a local van-sharing program sponsor that has been operating successfully in the Mission for several years. The invitation and program from the workshop are included in Appendix E.

## Key Transportation Working Group Outcomes

The TWG met once a month from September 2012-March 2013. The robust discussion at each meeting directly informed the alternative solutions studied and the formation of the business plan. Key consensus decisions and recommendations are summarized below. A full summary of meeting outcomes is included in Appendix B.

### Populations to be Served

Consistent with the findings from the Neighborhood Transportation Plan, the TWG determined that community transportation services should prioritize the youth and senior populations of the Bayview. The primary focus of the potential pilot should be on youth trips that support community based organizations programming – particularly after-school programs with a secondary emphasis on medical, senior and food access trips.

Both youth and seniors have well documented needs, and the potential benefits from improving access to the Bayview’s array of specialized programs and services for these populations are many. In addition to the obvious “baseline” of making more services available to more people, the potential for improved and more holistic outcomes – both in the short term and long term – is significant.

### Service Model

The Working Group reviewed a wide range of strategies which fall along a spectrum from small, initial changes to existing programs (which could be implemented quickly and easily) to larger strategies which would involve more significant shifts in how transportation and other services are organized and provided. By their nature, these larger, more comprehensive reforms would take longer to design and implement, and would require greater levels of partnering, funding, and operations management.

The Working Group decided to focus on short-range projects which improve utilization of existing resources as well as fill specific and well identified service gaps. If successful, these can be natural precursors to more complex programs and services which can more easily be developed once these first efforts have established credibility, and are providing improved mobility and customer satisfaction for patrons.

Examples of the range of service models that were considered by the TWG are listed below; a full summary of service options that were considered is included in Appendix C:

- **Fixed Route Youth Service:** A youth shuttle service that would operate on weekdays between approximately 2:30pm and 7:30pm. It would pick youth up at designated schools and other origins along one or two routes, drop them at participating after school programs, and then transport them from the after school programs to their homes. Integral to the success of an “after school bus” service is extensive organization and marketing as well as a centralized youth database where parents approve their child(ren) being picked up and dropped off at specific locations, days, times.
- **Charter Bus Bulk Discounts for Youth and/or Seniors:** CBOs could negotiate with one or more charter services for “volume discounts” that would be made available to the participating CBOs for summer, holiday and other field trips for youth or group trips for seniors to/from the Senior Center (or other community centers), for day-trips or evening outings, and/or for grocery shopping.

- **Fleet Consultative Services:** This strategy would provide CBOs with professional fleet cost analysis, as well as consultation about cost effective maintenance strategies, vehicle acquisition (types and number in the fleet), and other fleet management issues. This addresses the desire for professional assistance in vehicle acquisition, maintenance and management. It should also achieve lowering overall costs of providing service.
- **Shared Vehicles:** Like a car-sharing model, this strategy would involve a community vehicle (or vehicles) that would operate on a shared basis among participating CBOs.
- **Volunteer Driver Program:** A volunteer driver program could provide specialized access to medical care for seniors who require door-to-door or door-through-door assistance. The program would have to work closely with the Front Desk as appointments are made
- **On-Demand Senior/ADA Shuttle:** This program is modeled on the successful Emeryville 8-to-Go Senior/ADA shuttle service. It would utilize a mini-van (with ramp) to provide service and customers would call the driver/dispatcher directly to arrange an appointment either ahead of time or on the same day.
- **Mobility Management:** Mobility Management can encompass a wide range of activities, most broadly, it is defined as an approach for managing and delivering coordinated transportation services to customers. Such a service would need to evolve and grow over time but could include: travel training, coordinating existing services to achieve more efficient service delivery, and ultimately a “one stop shop” for assisting with all transportation needs for Bayview residents, particularly those facing significant mobility challenges.

The TWG made the following decisions about the preferred pilot service structure:

- Vans are more practical and flexible for trips that are low-volume, high cost and require a great deal of flexibility by different agencies who would utilize them.
- New vans, regardless of the type of fuel used, will be more efficient and less polluting than the current fleet of older vans currently in use by most agencies.
- Using a commercial driver will allow vans to be used at their full capacity and thus be more efficient.
- Shared service is a good model to pursue for the potential pilot due to the efficiency and potential cost savings.

Based on all these factors, the Working Group decided that the pilot vehicle-sharing program will utilize a “turnkey” vendor to provide youth trips to CBOs, medical and food trips.

### **Other Working Group Recommendations**

- Programs and services need to have a multilingual component incorporated
- Criteria for program implementation must include:
  - Safety
  - Cost and efficiency
  - Community connectedness/cohesion and inclusion
  - Cultural sensitivity – drivers and program staff trained to communicate well with different cultures, ages, etc. that reflect the diversity in the Bayview
  - Ease of start-up and ongoing management and operations

- Environmental sensitivity
- Community ownership

## **SUMMARY**

The Business Plan, which comprises the next part of this Report, builds on a long history of planning and community involvement around transportation issues in the Bayview. The history and background described in this Part B, including recommendations from past plans, lessons learned from existing Bayview services as well as from successful peer programs around the country and extensive stakeholder input, especially from the Transportation Working Group, all provided critical groundwork for development of the Business Plan.

The Business Plan provides a detailed road map for implementation of the potential pilot vehicle-sharing project in the Bayview with a developed schedule, budget and organizational structure. It will also be used as the basis for future grant funding opportunities. The main issues addressed include:

- Goals and Objectives
- Pilot Project Description & Delivery Approach
- Performance Measurement and Evaluation
- Funding Approach
- Annual Operations Budget & Startup Costs

The launch of this program would represent the long-awaited culmination of years of work on the part of many individuals throughout the community and the City of San Francisco; the mobility provided by the program will bring independence to multiple populations and contribute towards enhancing community prosperity and well being.



# **PART C**

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## Business Plan



# 1 PILOT PROJECT GOALS & OBJECTIVES

*The over-arching goal of the project is to transport Bayview Hunters Point youth and seniors between their homes, schools, and essential health and wellness community services.*

By removing barriers caused by lack of access to these services, the project enables participation in programs and services that promote healthy lifestyles and provides access to a wide range of community activities not otherwise available to these communities.

Four specific goals were identified for the pilot:

- **Access:** Increased access for Bayview residents to an array of health and wellness services with particular emphasis on improving access for the isolated communities of Hunters View and Alice Griffith public housing projects
- **Efficiency:** Improved operating efficiencies in delivering transportation service for community based organizations who are partnering for the pilot
- **Community-Capacity Building:** Building long-term community capacity for oversight and management of a transportation collaborative
- **Sustainability:** Long-term, post pilot sustainability

The Transportation Working Group, which prioritized the types of trips and specific populations within the Bayview for this project, also prioritized the following elements as critical to program design:

- Safety
- Efficiency
- Ease of Start-Up and Ongoing Management
- Community Cohesion, Inclusion and Ownership
- Environmental Responsibility
- Cultural Sensitivity

The Mobility Study was developed to address each of these elements, each described below.

## **Safety**

Safety is of paramount concern in this community. Real and perceived threats to personal safety are major barriers to residents' ability to access and participate in essential programs and services. Not only do seniors wish to be separated from youth when they travel, different youth groups need separation from one another to assure Safe Passage. This project can address these fundamental concerns while also working to foster a new sense of respect, etiquette and understanding among diverse groups that may extend beyond this program.

## **Efficiency**

Those community agencies that currently provide transportation for their clients do so on a limited basis that is inherently inefficient. Owning and maintaining a vehicle has certain fixed costs

regardless of whether it is used one or two hours or all day long, every day. Most CBO's operating 15 passenger vans have removed seating capacity in order to avoid having to hire a commercially licensed driver and use program staff as drivers. Providing transportation service is not part of any agency's core mission or competence and the resulting service is limited; it can be unreliable and expensive. Cumulatively, just a handful of agencies analyzed spend over \$500,000 annually. Others wishing to "charter" service for occasional field trips, must pay high rates for vehicles and minimum time commitments which exceed their needs. This project provides services through a consortium that effectively spreads costs among many users, utilizes vehicles more efficiently, and offers participants cost savings and/or access to more service.

### **Ease of Start-Up and Ongoing Management**

How difficult it is to implement the pilot and manage it, both during the pilot and beyond, is critical to short term success and long term sustainability. Starting a new non-profit organization from scratch is expensive, cumbersome and time-consuming for agencies already stretched for resources. It adds yet another layer of bureaucracy and cost. At the same time, providing reliable, safe transportation to support community programs requires technical expertise and administration/management that resides "in the community" for quality control and inclusion. The organizational structure of this project assures professional transportation management and operations, efficient community-driven governance, professional business and fiduciary management, as well as an open community process.

Over 15 agencies and community advocates have actively participated in the Transportation Working Group to date, and the Mobility Study team also interviewed and made presentations to several church leaders and other community groups to determine the level of interest in a collaborative project.

The project will ultimately be guided by a Community Advisory Board whose role will very much be community-facing as it provides overall direction and priorities for transportation services. 'Partnership' and access to services will be open to any agency who meets minimum criteria set by the CAB. As demand for services and the number of partners grow, so can service.

### **Environmental Responsibility**

In addition to inefficiencies within individual agencies who currently operate their own transportation service, there is a fair amount of duplication (i.e., several agencies picking youth up at one school) in current service delivery. Reducing the total number of vehicles on the street through a shared service concept reduces environmental impacts such as total fuel consumed, emissions generated and other factors. Replacing vans which are 10+ years old with newer models further improves these impacts.

### **Cultural Sensitivity**

The Bayview has one of the most diverse populations in all of San Francisco. Demographically, it is no longer dominated by any one ethnicity or racial category. The three main demographic categories are Asian, African American and Hispanic, but this fast-evolving community also has growing numbers of other cultural and ethnic populations including Eastern European and Middle Eastern immigrants. It will be of the utmost importance that transportation is marketed, available and delivered to all of these populations in culturally sensitive and respectful ways.

Because the Bayview Hunters Point neighborhoods have a long history of planning efforts which have not resulted in actual services or in services which were unsustainable, *it is critical that this project succeed in*

*delivering both its promise of putting credible service “on the street” and to design services for long-term sustainability.*

Building trust and community capacity among the project’s consortium who will work together to plan and oversee transportation services, and facilitating how they will work together on behalf of the community good and credibility are just as important as the service goals themselves. The strong desire for local involvement and participation will be supported by the pilot’s governance structure, which will ultimately establish both policies and levels of service to be provided through the collaborative.

Both the conceptual service models to be employed and the specific practices each will incorporate build on key “lessons learned” from past programs which were not successful or sustainable both in the Bayview and elsewhere, as well as those which have survived the test of time and are considered highly successful.

## 2 PILOT PROJECT DESCRIPTION

While many types of trips and market segments were identified in the needs assessment by the Transportation Working Group, the focus quickly narrowed for the near-term pilot project. Not only does the pilot provide an opportunity for the partners in the consortium to learn to work together to provide programs and services, within its 12-18 month timeframe, it allows for flexibility to refine services as needed. This will ensure the services work well for each partner as well as their respective users. The pilot also provides an evaluation mechanism to measure whether specific goals have been achieved, or whether goals have shifted. This monitoring process will inform the consortium as it moves into post-pilot phases.

There are three main market segments that will be targeted for the pilot:

- Youth (after school connections and field trips)
- Seniors (medical and health related trips)
- Food access

The project will employ three basic strategies to provide transportation services to youth and seniors. Each strategy produces value for our ‘partners’ by either providing trips *more efficiently* over the way service is currently provided; providing *new service* where there currently is none; or enabling a partner to *expand* its reach to new constituents.

Because the project’s early success is so important to all stakeholders – for a community who desperately needs services that provide value, as well as partners and funding sources, the project will start with a relatively small scope of services. As it establishes credibility, it will expand both its initial programs and add new services. The first phase will encompass a shared van service and mobility management, which will be the community interface for the shared van service. A second phase may establish a volunteer driving program at two public housing sites: Hunters View and Alice Griffith, this is further discussed in Chapter 6.

### SHARED VAN SERVICE

The shared van service model allows the project to respond to a diversity of needs with flexible solutions. Many of the trips to be provided by the project are ‘low volume, high cost’ trips. By their nature, these trips cannot efficiently be made on public transit (lengthy travel times, walking distances are too great, an excessive number of transfers are required, or service is not available when it’s needed). Many residents don’t qualify for paratransit for these trips, or again, the paratransit service model isn’t a good match, and driving alone isn’t an option.

The shared service model also allows for a great deal of flexibility among the various ‘partners’ and members as needs change. For example: partners may wish to swap blocks of time occasionally, and we envision both an academic year schedule and a summer and holiday schedule of services.

This type of collaboration also starts to build ‘structural capacity’ within the community to work together to plan, deliver and manage services in a unique way that will help ensure longer term success.

## **Shared Van Service Trip Types**

Phase 1 of the project will focus on providing three types of trips through the use of a shared van. The three trip types are:

1. **Weekday Youth Trips.** Priority trips include:
  - a. Transportation for young adults to and from job opportunity and workforce development programs
  - b. Transportation for elementary and middle school youth between school and after-school programs and then transporting those children home at the end of the day
  - c. Field trips and short, local excursions for youth in after school programs
2. **Medical Trips.** Priority trips include:
  - a. Transportation to and from home to the Southeast Health Center for same-day appointments
  - b. Transportation to and from and between various health clinics and resources in the Bayview (i.e., between Southeast Health Center and mental health clinics)
  - c. Transportation to pick-up prescriptions which are only available at a non-Bayview pharmacy
3. **Seniors, Health & Community Events and Food Access**
  - a. Transportation to and from home and the Senior Center and other sites for group activities
  - b. Group activities (i.e., grocery shopping) that are organized by an agency

The project will pay special attention to how to facilitate participation in the above programs and services for residents of the geographically isolated communities of Hunters View and Alice Griffith.

## **How a Shared Van Service Model Works**

The shared van model mimics successful models used by car-sharing companies to achieve operating efficiencies. It lowers costs for individual members by increasing the utilization of each vehicle and spreading certain fixed costs over several ‘partners’ and those increased hours. Centralized oversight and management offers efficiencies to partners, who simply reserve a vehicle either on a recurring or as-needed basis through a single portal. The service itself is provided by a vendor, whose business is to provide equipment, labor and other necessary services (i.e., insurance, maintenance, etc), which frees each ‘partner’ from having to deal with transportation logistics, reduces administrative burden and assures service reliability.

A shared vehicle model encourages partners to share service itself whenever possible. This further lowers the cost of service for each partner, increases overall operating efficiencies and makes the service available to more customers. For example, youth may be picked up at one school and taken to several after-school programs, instead of just to a single agency. Instead of one agency absorbing the full hourly cost of providing that service, the cost is amortized across several agencies.

Table C-1 The Advantages of Cost-Sharing

| Run Time | Single User | Shared     |            |            |
|----------|-------------|------------|------------|------------|
|          |             | 2 partners | 3 partners | 4 partners |
| 1 hour   | \$42.16     | \$21.08    | \$14.05    | \$10.54    |
| 3 hours  | \$126.48    | \$63.24    | \$42.16    | \$31.62    |

Other types of trips may also be combined for efficiency, as well. Medical, food and senior trips can all work synergistically when several such destinations are within close proximity to each other, and therefore become shared trips. For instance, if one point of origin such as a housing complex has customers going to several destinations; or when programs actually collaborate with one another (i.e., the senior center takes a group to a Farmers Market or to a health screening). As the trend for more health services in particular to be co-located within the Bayview grows, so do the opportunities for such collaboration and sharing.

While core partners will have standing reservations for certain, pre-set time blocks of usage, the vehicle will also be available for other partners and members based on availability. Examples of such use are the windows of availability in between regularly scheduled services which are well-suited for short field trips and special events. Growth can occur organically, as both the number of users and demand for more regularly scheduled service and/or charter availability grows.

Fees for charter or single use, as well as the costs for shared services will be determined in advance. Agencies will be able to include transportation costs as a line item in program budgets and know exactly what they are spending per program and per customer. They will be able to evaluate the impact providing transportation has on program outcomes and overall participation and demonstrate its value to their funding resources.

## **DEVELOPMENT OF A COMMUNITY ADVISORY BOARD**

The community will be assured of local participation opportunities in all aspects of the collaborative through the development of a Community Advisory Board which will oversee the pilot and subsequent projects.

The CAB will provide overall governance – with responsibility for setting policy, business practices, protocols and priorities. The Transportation Working Group has already identified several constituencies to be represented on the CAB in addition to the core partners and agencies who are sharing services. They include actual users of the services, community advocates, developers and other stakeholders, potential funders, and key liaisons from the City “family” of health and human services agencies, and transportation expertise.

## **MOBILITY MANAGEMENT**

Mobility Management is an innovative approach for managing and delivering coordinated transportation services to customers. It is particularly effective in delivering service to older adults, people with disabilities and low income individuals. One of its fundamental features is that it offers a single point of contact for customers for all of their transportation questions and needs.

Mobility Management is *customer-driven*, focusing on meeting individual customer needs through a range of transportation options and service providers. A Mobility Manager works in several capacities: marketing and brokering a “family of transportation services” to assist individuals in meeting their travel needs; providing travel training and navigation for individuals, community organizations, and other small

groups with specific needs, as well as information, referrals, advocacy and policy coordination on behalf of the community.

By operating from a customer service perspective, barriers are removed by getting information about the range of services available to the people who need it, helping them access those service (i.e., referrals and assisting in eligibility and registration), and lastly, helping them learn how to use those services through demonstration rides, travel training and travel ambassadors.

A Mobility Manager will be charged with handling the day to day operational coordination between partners and the vendor; with the all-important customer service and marketing functions; and will also be the liaison with the Fiscal Sponsor. The Mobility Manager will be the 'public face' of the project.

Over time, the Mobility Manager will play a larger role towards fulfilling the capacity building aspects of the project, becoming a "go-to" community resource for transportation in general; building relationships with the network of transit providers; helping the community access and utilize all modes of transportation and serving as an advocate. As the demand for Bayview-specific Mobility Management service increases, so will this function.

## 3 PILOT PROJECT DELIVERY, MANAGEMENT & IMPLEMENTATION

This project will be structured in a way that expedites start-up, minimizes risk, provides maximum accountability for service delivery, and utilizes existing community resources where possible. Its foundation will be community involvement and ownership.

Figure 3-1 on the following page summarizes the organizational structure and describes key roles and responsibilities.

### COMMUNITY ADVISORY BOARD

Ownership and establishment of overall service goals and project oversight are the primary responsibility of a Community Advisory Board (CAB), who will be comprised of representatives from all facets of the community, users of the services, as well as community leaders and other stakeholders with an interest or investment in the success of the project. Another important function of the CAB will be to develop policies and business practices that reflect both the short and longer term goals and design criteria established at the outset of the project. The CAB's role in building trust and credibility both among the project members, and in the community at-large, is fundamental to building community capacity from within the Bayview.

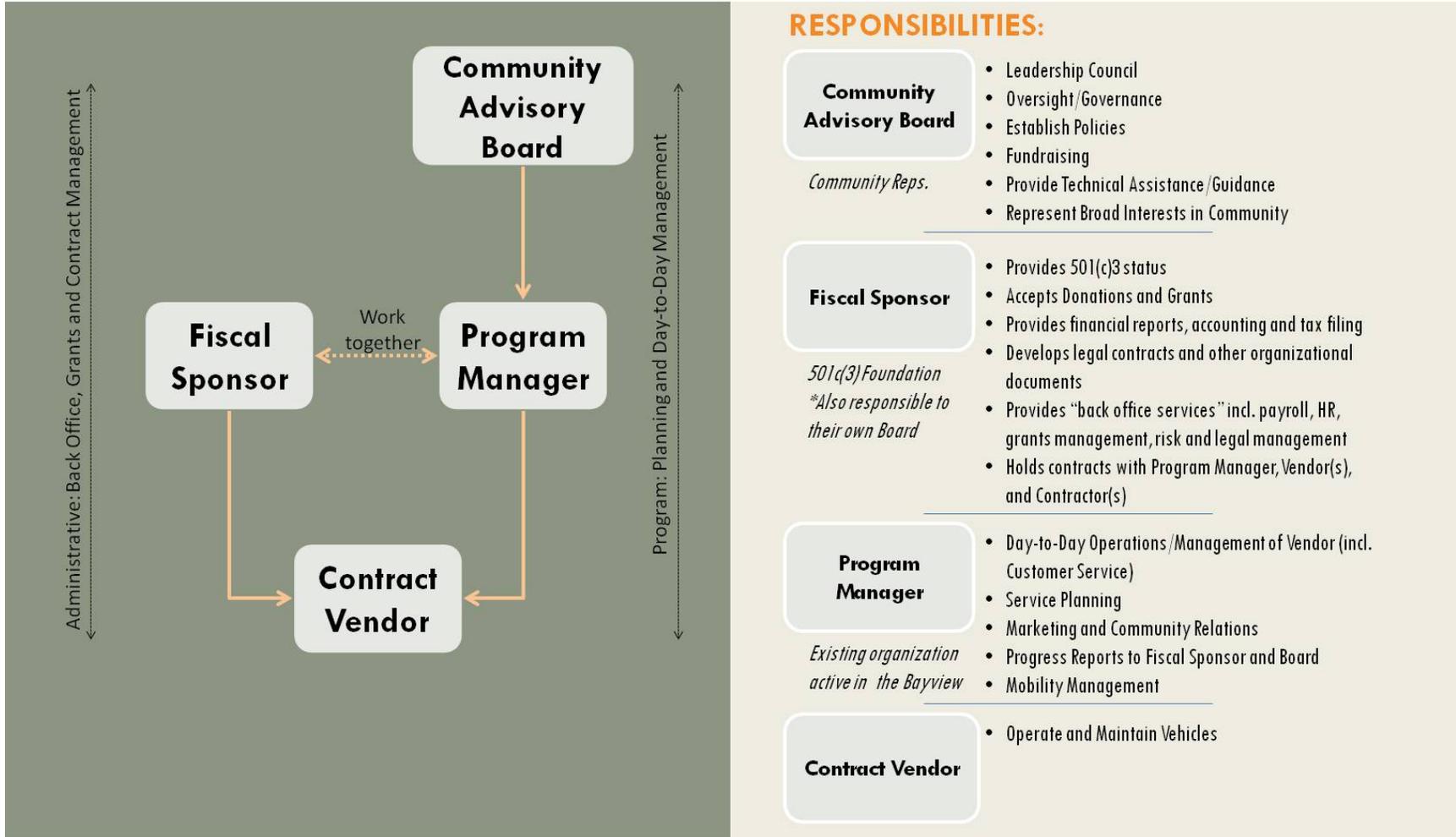
### MOBILITY MANAGER

The CAB will hire a Mobility Manager, who will be responsible for day to day service coordination and liaison between partners and vendors, as well as for marketing and customer service. The Mobility Manager, as the public “face” of the project, is also instrumental in inviting local participation where it is feasible and practical during the pilot and as programs grow.

Another key function of the Mobility Manager will be to provide personalized Travel Training/ambassadorial service to both individual customers and the project's partners and members. This component is essential in helping customers become familiar with how the service works, how it can help them access specific health and wellness resources and participate more fully in the community. Children and their parents will also understand the valuable new options transportation creates for after school program participation that is dynamic as, for the first time, various CBO's can “share” youth as well as the van service to offer a richer, more robust array of programs. Longer term, hiring additional travel trainers and/or ambassadors are potential opportunities for meaningful local participation in the project.

Figure C-1 Organizational Structure

## PROPOSED ORGANIZATIONAL STRUCTURE BAYVIEW HUNTERS POINT COMMUNITY-BASED VAN SHARING PILOT PROGRAM



The pilot makes a significant investment in Mobility Management. It is important that the Mobility Manager be hired from within the community and already be knowledgeable about and engaged in the Bayview's neighborhoods, population groups, community agencies and resources. A technical transportation specialist will supplement this base of "community knowledge", working with the Mobility Manager during the pre-service stage and throughout the pilot program to train the Mobility Manager in transportation-specific areas. The technical consultant will also assist in the development of reports and other activities to manage and evaluate service and programs.

The pilot's (and subsequent) success rests heavily on the Mobility Manager's ability to effectively establish this program as a highly valued and visible community resource through ongoing education and marketing; through effective liaison between service partners and service providers; and through prudent program administration and management.

## **FISCAL SPONSOR**

We will utilize a Fiscal Sponsor to provide the 501C3 umbrella and take advantage of an essential suite of professional "back office" services -- accounting, legal and risk management. The Fiscal Sponsor will perform two other fundamental functions: it will work closely with the Community Advisory Board to develop an appropriate structure and scope to ensure full community participation, transparency, and engagement. It will also provide legal and risk management expertise in developing contracts, agreements and other legal documents. Yet another advantage to partnering with a Fiscal Sponsor is the training and resources in non-profit business management and potential funding opportunities which are made available through a Fiscal Sponsor. The Fiscal Sponsor will work with the Mobility Manager to ensure the development of sound business practices and protocols, and it will hold contracts with the project vendors and Mobility Manager; both of which enhance the project's credibility with potential funders.

## **TRANSPORTATION SERVICE PROVIDERS**

Using a "turn-key" vendor to provide service initially was one of the most important decisions made by the TWG. Too often, new ventures try to do everything themselves and vastly underestimate the many systems and levels of expertise involved in providing reliable service.

A full-service contract with a reputable vendor allows the project to focus on building ridership and helping partners and their customers actually use the service, which is necessary for a successful start-up. It limits liability and insurance issues for each partner by providing a contractual arms-length relationship with a vendor.

It assures a driver and a vehicle for the service; vendors have back-up provisions for both. Having a full service contract outsources vital functions such as maintenance, legal logs required, driver qualifications, random drug testing and a host of other details integral to transportation service providers. It also provides flexibility to utilize different types and sizes of vehicles as the project evolves. A vendor with a fleet of vehicles can quickly respond to requests for larger vehicles, for instance, or provide special vehicles for a one-time special event.

It simplifies ongoing coordination and scheduling. A system that will be jointly managed by the vendor and Mobility Manager will be set up prior to the launch of service. It holds the vendor accountable for making sure service is available as scheduled, producing utilization and other reports.

Once the pilot has proven successful; volume and the breadth of services expands, and with it, in-house technical skills and abilities develop, the CAB may elect to bring some programmatic elements in-house. The CAB will make these determinations as community needs and its capabilities evolve.

## THE INITIAL PILOT PROJECT PARTNERS

The founding ‘partners’ for this new consortium include:

- The Southeast Health Center
- The YMCA’s adult and youth services
- A. Philip Randolph Institute’s job access and Youth xxx programs
- George R Davis Senior Center
- Black Coalition on Aids
- City of Dreams youth programs

The above agencies have committed to a combination of shared and individual service for the pilot project. Consensus for a preliminary weekday schedule developed around each agency’s specific requests for service; the budget and cost allocation, has also been reached. Each partner can see what service will cost and recognizes, although the pilot period will be funded in part or wholly by grants, the level of financial commitment needed long-term, as the project moves from pilot towards self-sufficiency.

The sample schedule below illustrates the preliminary schedule for shared van service.

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Figure C-2 Preliminary Schedule for Sharing Van Service

|          | MONDAY         | TUESDAY               | WEDNESDAY      | THURSDAY              | FRIDAY         | SATURDAY |
|----------|----------------|-----------------------|----------------|-----------------------|----------------|----------|
| 7:30 AM  |                |                       |                |                       |                |          |
| 8:00 AM  | Medical        | Medical               | Medical        | Medical               | Medical        |          |
| 8:30 AM  |                |                       |                |                       |                |          |
| 9:00 AM  | Shared Service | Shared Service        | Shared Service | Shared Service        | Shared Service |          |
| 9:30 AM  |                |                       |                |                       |                |          |
| 10:00 AM |                |                       |                |                       |                |          |
| 10:30 AM |                |                       |                |                       |                |          |
| 11:00 AM |                |                       |                |                       |                |          |
| 11:30 AM | Pharmacy       | Shared Service        | Shared Service | Shared Service        | Shared Service |          |
| 12:00 PM |                |                       |                |                       |                |          |
| 12:30 PM |                |                       |                |                       |                |          |
| 1:00 PM  |                |                       |                |                       |                |          |
| 1:30 PM  |                |                       |                |                       |                |          |
| 2:00 PM  | Youth Shared   | Shared Youth          | Shared Youth   | Shared Youth          | Shared Youth   |          |
| 2:30 PM  |                |                       |                |                       |                |          |
| 3:00 PM  |                |                       |                |                       |                |          |
| 3:30 PM  |                |                       |                |                       |                |          |
| 4:00 PM  |                |                       |                |                       |                |          |
| 4:30 PM  | Youth Field    |                       |                |                       | Youth Field    |          |
| 5:00 PM  |                |                       |                |                       |                |          |
| 5:30 PM  |                |                       |                |                       |                |          |
| 6:00 PM  |                |                       |                |                       |                |          |
| 6:30 PM  |                |                       |                |                       |                |          |
| 7:00 PM  | Youth          | Shared Youth          | Shared Youth   | Shared Youth          | Shared Youth   |          |
| 7:30 PM  |                |                       |                |                       |                |          |
| 8:00 PM  |                |                       |                |                       |                |          |
| 8:30 PM  |                | Evening Adult Program |                | Evening Adult Program |                |          |
| 9:00 PM  |                |                       |                |                       |                |          |
| 9:30 PM  |                |                       |                |                       |                |          |

Available

## IMPLEMENTATION ACTIVITIES & TIMELINE

The study team anticipate a six month period during which organizational development will occur and programmatic details will be finalized. The following chart describes key activities and work flow.

Table C-2 Key Activities and Work Flow

| Activity  | Month |   |   |   |   |   |
|---|-------|---|---|---|---|---|
|   | 1     | 2 | 3 | 4 | 5 | 6 |
| <i>Organizational Development</i>   |       |   |   |   |   |   |
| Finalize partners for pilot:  |       |   |   |   |   |   |
| Determine “master” schedule   | X     |   |   |   |   |   |
| Obtain letters of commitment from partners  | X     |   |   |   |   |   |
| Establish Community Advisory Board  | X     |   |   |   |   |   |
| Name Project  | X     |   |   |   |   |   |
| Apply to Fiscal Sponsor (upon receiving funding commitment)   |       | X | X |   |   |   |
| CAB to establish policies re: services, vendors, etc. (with input from Fiscal Sponsor)  |       |   | X | X |   |   |
| Establish organizational agreements, contracts with partners, Project Director (Mobility Manager), others (under direction of Fiscal Sponsor) |       |   |   | X | X |   |
| Develop RFP for service provider; select vendor and finalize contract   |       |   |   |   | X |   |
| Vendor training   |       |   |   |   |   | X |
| Develop protocols for customer service, reports, quality assurance, etc. (with vendor and Fiscal Sponsor)                                     |       |   |   |   |   | X |
| <i>Marketing</i>  |       |   |   |   |   |   |
| Community Engagement: presentations to churches, schools, parent groups, public housing meetings to build awareness                           |       |   |   | X |   |   |
| Develop website, educational and marketing materials  |       |   |   | X |   |   |
| Work with each partner to develop internal processes to take advantage of transportation potential  |       |   |   | X | X |   |
| Offer demonstration rides at specific agencies, destinations  |       |   |   |   |   | X |
| Participation in community events   |       |   |   | X | X | X |

## 4 PILOT PROJECT COSTS & FUNDING APPROACH

### PILOT PROJECT BUDGET

Initial plans and budgets estimated costs for agency-partners based on the level of service and type of participation each partner indicated it wanted. The hourly costs for service which were subsequently derived represent a “worst case scenario” for each project partner. This is the total financial commitment each partner would need to make if no other funding were available. This also gives agencies a budgetary line item for transportation to support various programs that is realistic and will help assure post-pilot sustainability. This line item can be incorporated in future program budgets and grants.

It should be noted in some cases; the total investment by participating in this pilot is less than what an agency currently spends providing its own dedicated service, yet the number of service hours and potential number of constituents to be served, increases significantly.

Should additional funds be raised to cover part or the entire pilot project costs, these total cost will be reduced, OR the project partners can elect to earmark savings into a future growth/sustainability fund. In post-pilot years, annual budgets will be based on actual commitments made by the project partners.

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**Table C-3 Annual Operations Budget for Shared Van/Mobility Manager Pilot**

| Line Item                      | Description & Assumptions   | Cost             | Who  |
|--------------------------------|---|------------------|--|
| Shared Van Operations          | Full service contract.<br>\$40/hour based on 55 hours of service/week | \$114,400        | Vendor   |
| Mobility Manager               | 20 hours/week @ \$20;<br>5 hours/week @ \$30                          | \$28,600         | Contract through existing Bayview resource                         |
| Fiscal Sponsor                 | 9 to 15% of revenues  | \$23,370         | (ex:Tides, SF Study Center of SF Foundation Community Initiatives) |
| Other                          | Website and hosting, phone service, office supplies                   | \$5,000          |  |
| Technical Assistance           | Ongoing liaison with Mobility Manager as needed @ 1 hr/week           | \$7,800          |  |
| <b>Total Operations Budget</b> |   | <b>\$179,170</b> |  |

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Table C-4 Start-Up Costs (over 6 months)

| Activity   | Est. Hours<br>Mobility Manager<br>@ \$30/hr | Est. Hours<br>Technical Consultant @<br>\$150/hr |
|--|---|--|
| Liaison with Partners: Work with each partner to maximize how they will utilize their segment of service; assist in internal organization (5 hours at each partner; 6 partners)  | 30 hours                                    | 20 hours   |
| Pre-Marketing (demonstration rides, special events to introduce service)   | 20 hours                                    | 10 hours   |
| Liaison with Fiscal Sponsor to set up systems, procedures, protocols. Prepare and execute agreements with vendors and partners   | 10 hours                                    | 10 hours   |
| Vendor Liaison: Prepare RFP, evaluate, interview and selection.<br>Review final schedules, destinations, routes<br>Test runs<br>Establish protocols and operational procedures<br>Configure reports<br>Driver training | 30-35 hours                                 | 20 hours   |
| Marketing:<br>Name service, logo<br>Develop website and marketing materials<br>Pre-publicity to community through presentations, fliers, articles, etc.  | 12 to 15 hours                              | 10 hours   |
| Customer Service:<br>Develop protocols, procedures, reports for monitoring all aspects of Customer Service (inquiries, referrals, complaints, utilization, etc.)   | 6 to 10 hours                               | 6 hours  |
| Ongoing Technical Support (10 hours per month for 6 months)  |   | 60 hours   |
| Financial Technical Support (20 hours) to assist CAB in setting membership dues, fees, policies  |   | 20 hours   |
| <b>Total Hours</b>   | <b>128 to 140</b>                           | <b>156</b>                                       |
| <b>Total Cost</b>  | <b>\$3,840 to \$4,200</b>                   | <b>\$22,900</b>                                  |

*Note: The start-up budget includes significant amount of training for the Mobility Manager, which builds community capacity even prior to the launch of service.*

## **FUNDING APPROACH**

This project accomplishes important objectives which are common among both public and private funding sources. They include:

- Agencies collaborating with one another to provide more comprehensive services
- Reducing duplication of similar efforts
- Increasing overall utilization of resources and efficiencies
- Reducing overall and individual agency costs over current expenditure levels
- Increasing accountability and transparency
- Expanding reach and access for constituents
- Building community capacity within the consortium and within individual partner agencies

Some 80 Federal programs provide transportation services or funding for transportation services through an array of state, regional and local grantees. In 2010, the GAO identified the following specific Federal agencies:

- Department of Health and Human Services (31 programs)
- Department of Education (12 programs)
- Department of Housing and Urban Development (12 programs)
- Department of Labor (10 programs)
- Department of Transportation (7 programs)
- Department of Veterans Affairs (3 programs)
- Department of the Interior (3 programs)
- Department of Agriculture (2 programs)

Scores of other private Foundations and grants currently fund transportation programs and service for our Bayview project partners or for other community agencies throughout the Bay Area, which further expands the data base of potential funders.

Because this project takes such a holistic and efficient approach to serving the transportation needs in the Bayview by working through existing agencies, public housing sites and other respected community institutions, we believe that grant funding is realistic for both start-up and long-term operations.

Several agencies, who are the core partners in this project, already devote significant financial, management and administrative resources to transportation. These efforts are already budgeted through existing program and other grant funds. The opportunity for agencies to partner with each other to solicit joint and matching grants for this project is huge. The annual operating budget for this project is significantly less than the amount which was spent on a previous community shuttle program which was only recently discontinued. It is also “affordable” for its initial partners.

Other potential funding sources include medical providers (hospitals, dialysis, cancer and other specialty programs) who serve large numbers of residents in the community; developers and

businesses who are looking for ways to participate in highly visible ways in the community; grocery stores and other ‘destinations’ who may benefit from the project’s services.

There is a spectrum of opportunity potential. Here are just a few possibilities:

- Grant funding to ‘buy down’ the cost of a vehicle, which reduces the effectively hourly rate for use for agencies
- Smaller grants and donations specifically for fuel, maintenance, insurance, and other fixed costs from banks or local businesses (with sponsorship recognized on the project’s vehicles, on its website, etc)
- Gift cards and discounts provided by local merchants as part of Volunteer Driver program reimbursement incentives
- Funding for specific blocks of service (i.e., a pharmaceutical company funding the pharmacy run)
- Funding for specific types of service (i.e., Dept. of Aging or other resource funding medical trips for chronic disease management or access to Food Pantries)

## 5 PERFORMANCE MEASUREMENT & EVALUATION

The UCSF Clinical & Translational Science Institute’s Community Engagement and Health Policy Program has been an active participant in the Transportation Working Group which has guided the design of the pilot project. UCSF is also part of the Bayview Heal Zone’s efforts, many of which are focused on linking transportation availability and usability with improved health outcomes.

UCSF has generously offered to consult with this project on evaluation design. The project will have the benefit of UCSF’s “think tank” of professionals from multiple perspectives to assist in the design of relevant evaluation criteria. We anticipate that it will include both transportation-specific metrics and overall health and wellness targets and benchmarks. As we work through the evaluative measures, many will tie back into the original goals and program design principles. Among them:

- Utilization rate for shared vehicle
- Number of ‘partners’ and other members
- Number of customers served across multiple programs and organizations
- Number of trips and trips to destinations such as a Farmers Market
- Cost per program/trip/customer
- Customer satisfaction with service and perceptions
- Attendance in programs and/or at school as a result of transportation service
- Reduction in no-show rates for medical appointments
- Increased rates of filling prescriptions
- Decreased emergency room visits

Some evaluative measures lend themselves to relatively straightforward metrics, such as the utilization rate for shared vehicles, number of customers served, trips provided, and costs. Others are more complex. How do we measure value and sustainability?

Ultimately, whether the project sustains post-pilot will largely depend on values that program partners attribute to their direct participation, and whether they are willing to fund the service into the future.

## 6 MID-LONG TERM PROGRAM OPPORTUNITIES

### VOLUNTEER DRIVER PROGRAM

A potential future phase of the Bayview Community Mobility Project could be a volunteer driver program

A volunteer driver program will target the particularly isolated Hunters View and Alice Griffith housing projects initially, facilitating “high cost/low volume” trips by individuals who need to get to destinations beyond the parameters of other programs, at times outside of normal operating hours; or who fall short of qualifying for paratransit service but cannot make certain trips independently.

This program will be based on the Beverly Foundation’s longstanding and successful templates for volunteer driving programs in use around the country for the past two decades. Among the key ingredients: programs are low cost; easy to administer and track; easy for customers and drivers to register and use; they empower customers; are worthwhile for the volunteer driver; offer flexible times and destinations; and use trusted existing resources.

The biggest challenge for most volunteer driver programs is that demand outpaces the availability of drivers. Well-managed programs have excellent safety records and experience few problems obtaining reasonable insurance.

As Hunters View and Alice Griffith are rebuilt, each site will be staffed with community “connectors” whose job it is to work directly with residents. The Mobility Manager will work with staff at each site to recruit a pool of volunteer drivers and riders and market the program.

Volunteer drivers must furnish a clean driving record, a current driver’s license, and proof of insurance. Before being approved as a driver in the program, applicants undergo a basic training program and must be deemed insurable by the project’s insurance carrier. This information is maintained in a central database by the Mobility Manager, along with contact information for the volunteer driver.

Potential riders may contact the volunteer driver directly to request a trip. Trips are scheduled at their mutual convenience (not only during regular business hours). After the trip, the Mobility Manager confirms with the rider that the trip was made satisfactorily and authorizes reimbursement to the volunteer. Reimbursement is normally the current IRS rate allowed for mileage plus any parking or tolls incurred. Reimbursement provides the incentive for the volunteer driver to take his or her neighbor to the grocery store, or to a doctor’s appointment across town. It also empowers the rider to “ask” for the ride by being able to offer to pay the driver’s expenses.

Program costs are sustainable: ongoing costs involve data base maintenance, marketing, volunteer reimbursements and a basic insurance policy. The Beverly Foundation has readymade templates to utilize for all aspects of this program, which further simplifies and expedites start-up as well as ongoing management.

This volunteer driver template can easily be applied to other housing projects or neighborhoods in the future. Volunteers can be recruited from other sources such as nearby churches (who may want to 'adopt' certain blocks or areas). This program can be used to cost effectively help residents access the weekly Food Pantries in the Bayview – or it can deliver food from the pantries to shut-ins. It is a cost effective way to provide trips to medical facilities across town which may otherwise take two or three transfers and too much time on public transit. Volunteer driver programs can also effectively serve special “niches” such as Veterans driving Veterans to the VA and other destinations, where there are specific commonalities, shared interests and commitments.



# **APPENDIX A: RECENT BAYVIEW HUNTERS POINT PLANNING EFFORTS**

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Past studies and plans that informed the Business Plan include: the 2009 BMAGIC Landscape Analysis, the Transportation Authority's 2010 Bayview Hunters Point Neighborhood Transportation Plan and DCYF's 2011 Community Needs Assessment, each described in turn below.

### **BMAGIC Landscape Analysis (2009)**

**Key findings:** Over 36% of respondents (19 organizations) provide transportation services to clients. The percent of response is greatest with regard to transport by van (25%) followed by a private vehicle (15%). While transportation services are provided by only a third of the respondents, it would be beneficial to ascertain: (1) how CBOs collaborate to share this resource, (2) the barriers that inhibit such efforts, (3) how CBO's can collaborate to address insurance and liability concerns (particularly with the use of privately owned vehicles), and (4) how the CBO's and the funding community can prioritize resources that build service capacity in this area.

### **SFCTA Bayview Hunters Point Neighborhood Transportation Plan (2010)**

**Key recommendations:** Undertake a focused, in-depth technical and community study to advance a community-based transportation program to implementation-ready status. Pursue other initiatives to improve mobility and accessibility in the community. These include the promotion of carsharing; public safety measures and infrastructure improvements that support walking, bicycling, and transit ridership; identification of transit operating funding to reverse recent Muni service cuts that have affected the Bayview and other neighborhoods; and improved regional transit access, including the design and construction of a Caltrain station at Oakdale Avenue.

### **DCYF 2011 Community Needs Assessment**

**Key findings:** Parents, community members, and service providers who participated in the 2011 Needs Assessment identified free and low cost Out of School Time (OST) programs as the primary need for elementary and middle school age youth. OST programs include afterschool programs, summer programs, and extracurricular activities that take place after school hours and when school is not in session.



**APPENDIX B: TRANSPORTATION  
WORKING GROUP ROSTER &  
MEETING OUTCOMES**

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## **TRANSPORTATION WORKING GROUP COMMUNITY MEMBERS**

| <b>Individual</b>   | <b>Organization</b>                                |
|---------------------|--|
| Kurt Grimes         | Philip Randolph Institute                          |
| Lyslynn Lacoste     | BMAGIC   |
| Karen Pierce        | Department of Public Health                        |
| Maxine Gilkerson    | Black Coalition on AIDS                            |
| Vanessa Dandridge   | Mayor's Office on Housing                          |
| Vanessa Banks       |  |
| Jackie Fun          | A. Philip Randolph Institute                       |
| Emily Wade-Thompson | SF United School District                          |
| Gwen Smith          | Southeast Health Center                            |
| Maya Rodgers        | Bayview Hunters Point Multipurpose Senior Services |
| Amy Tharpe          | HOPE SF  |
| Kenneth Hill        | SEFA Food Guardians                                |
| Roberto Vargas      | UCSF/Bayview HEALZONE                              |
| Veronica Shepard    | Bayview Health and Wellness Clinic                 |
| Lisa Zayas-Chein    | Department of Public Health                        |
| Neal Hatten         | Bayview YMCA                                       |
| Mike Yoshioka       | City of Dreams                                     |
| Javarré Wilson      | Black Coalition on AIDS                            |

## TRANSPORTATION WORKING GROUP MEETING OUTCOMES

### Meeting #1 – September 11, 2012

#### Key Discussions and Themes:

- Transportation is central to livable communities and promoting health and well-being
- The Transportation Working Group will
  - Understand the role of mobility among partners and in the community in general
  - Identify and prioritize opportunities for collaboration and overall goals
  - Analyze potential programs
  - Develop an implementation strategy for a pilot program
- The Business Plan to be developed will
  - Advance collaborative transportation strategies
  - Build the capacity of the BVHP community
  - Improve access to essential destinations that support community health and well-being
  - Address goals and objectives, market analysis, outline pilot and potential ongoing programs, phasing and financial sustainability (near-term, mid-and-long-term), evaluation, and institutional, administrative, management and governance issues.
- Potential strategies discussed included:
  - Mobility management – the professional capacity to coordinate, market, and provide technical support to new and/or existing programs
  - Collaborative transportation services including sharing personnel, equipment and/or joint programming and services
- How community based organizations can support each other through transportation, building community and social capital and increase access to important destinations
- How we can help get people “off the hill” and thereby reduce isolation
- How we can understand and overcome real and perceived barriers
- Opportunities to increase access without increasing pollution
- What types of trips are most needed; which ones are done poorly
- Expectations of group participants over the next 6-7 months

#### Consensus Decisions and Recommendations:

- We don't want to add new pollution and want to promote environmentally-friendly solutions
- We want to improve mobility for youth
- We want to improve client access for services and in particular, reduce isolation for those who live in geographic areas which are not well connected with other parts of the community
- We want to make it easier for people to lead more active lives and eat healthier foods
- We want to overcome liability barriers regarding shared services

- There is interest and opportunity among funders to promote public/private collaborations
- Policy-makers are interested in collaboratives and partnerships
- We want to identify ways to deploy existing resources more efficiently and for CBO's to support each other
- We want to build community capacity and social capital

## **Meeting #2 – October 9, 2012**

### **Key Discussions and Themes:**

- The need and rationale for collaboration: efficiency, program effectiveness and community capacity-building
- A group exercise prioritized trip types and markets. Travel markets and needs included
  - Youth (school-to-after-school programs); Excursions and Local Trips
  - Seniors and Adults (medical trips, senior center and other adult programs and community events)
  - Food Access (grocery stores, Farmers Markets, food pantries)
  - Connections from “the Hill” and Alice Griffith to the Third St. corridor
- Criteria for program prioritization included
  - Cost
  - Responsiveness to existing transportation gaps
  - Complexity/ease of implementation
  - Community connectedness and cohesion
  - Environmental sustainability
  - Safety

### **Consensus Decisions and Recommendations:**

- The primary focus of the pilot should be on youth trips that support community based organizations' programming – particularly after-school programs
- Secondly, we will address medical and senior trips, and food access
- Lastly, we will lay the groundwork for a volunteer driver program which can begin to address the special needs of Hunters View and Alice Griffith residents
- Any programs or services need to have a multilingual component incorporated
- Other trip types that can be added to a program in future phases included:
  - Church
  - Local 94124 trips
  - Food Pantry deliveries to shut-ins
- Other criteria added to the priorities included:
  - Services which are sensitive to the Bayview's needs
  - The need for ongoing training and education
  - We want to leverage whatever is working well

## **Meeting #3 – November 13, 2012**

### **Key Discussions and Themes:**

- How transportation is currently provided to for youth, medical and senior trips in the community
- The cost of how service is currently provided, based on an analysis of just 5 CBO's
  - Over \$500,000 per year is currently spent (just by the 5 agencies analyzed)
  - The cost for service ranges from \$60-\$70 per hour
  - Agencies pay program staff to drive (in most cases) at an annual cost of \$245,000-\$300,000
  - Agencies spend \$50,000 to \$73,000 on vehicle maintenance
  - Agencies spend \$72,000 on fuel
  - Management/insurance costs of \$24,000 to \$36,000 per agency
- The Bayview Community Health Shuttle (since discontinued) cost approximately \$200,000/year
- The concepts of vehicle pooling, shuttles, and volunteer driver programs and the advantages and trade-offs of different approaches
- Comparison of the differences between “cutaway buses” and vans in terms of passenger capacity, acquisition and operations costs, fuel type and efficiency, emissions, and driver considerations
- How transportation can help organizations reach out to new markets
- The risks and trade-offs for CBO's and what individual agencies might need in order to participate in a pilot
- How a program could begin on a small scale and expand as funding and/or participants increase
- The importance of having service that is successful and building from that credibility over time

### **Consensus Decisions and Recommendations:**

- Vans are more practical and flexible for trips that are low-volume, high cost and require a great deal of flexibility by different agencies who would utilize them
- New vans, regardless of the type of fuel used, will be more efficient and less polluting than the current fleet of older vans currently in use by most agencies. Using a commercial driver would also allow vans to be used at their full capacity and thus be more efficient
- Criteria for program implementation must include:
  - Safety
  - Cost and efficiency
  - Community connectedness/cohesion and inclusion
  - Cultural sensitivity – drivers and program staff trained to communicate well with different cultures, ages, etc. that reflect the diversity in the Bayview
  - Ease of start-up and ongoing management and operations
  - Environmental sensitivity

- Some “general circulator” services is needed for “family nights” and other such community events
- Shared service is a good model to pursue for the pilot
- The idea of a Mobility Manager to help coordinate and market programs was well received. This also starts to build community capacity.
- We can look for corporate sponsors and others who want to support a healthy community.
- Some services (i.e., food trips) might be supported by groups such as the Food Guardians

## **Meeting #4 – December 11, 2012**

### **Key Discussions and Themes:**

- Program options specifically for a Shared Van program could include:
  - Joint/partnered service (multiple organizations using service at the same time)
  - Reservation-based service (organizations reserving service as needed, akin to car-sharing models)
  - Elements of a Shared Van program include the vehicle, driver, fuel, insurance, administration and marketing/outreach/customer service
- Approaches to service delivery along the spectrum from a fully contracted service to one run entirely “in-house” and the trade-offs inherent in the various approaches
- How volunteer driving programs typically work, citing several examples from different types of communities across the nation
- Meeting with MTA and other City departments to inform them of our plans and invite feedback, to be scheduled in the near future

### **Consensus Decisions and Recommendations:**

- Working Group members will share our progress to date with their executive leadership
- The leadership team will start meeting one-on-one with organizations interested in participating in a pilot to determine individual service needs and implementation considerations
- The pilot program will have two phases. We will launch with a “turnkey” vendor.
  - Phase 1:
    - Shared van(s) to provide youth trips to CBO’s (after-school hours, local trips, summer)
    - Shared van(s) to provide medical and food trips
    - Availability to others as available
  - Phase 2:
    - Volunteer driver program to provide trips for isolated residents in Hunters View, Alice Griffith as well as to possibly delivery food to shut-ins from the food pantries
- Specific questions for our one-on-one meetings with CBO’s will include:
  - What is needed for their participation in the pilot

- What kind of flexibility do they need
- Costs
- Will participation in the pilot allow them to reach new clients
- Impact on existing vehicles
- What would their customers expect
- Sustainability
- Oversight

## **Meeting #5 – January 8, 2013**

### **Key Discussions and Themes:**

- Summary of meetings with organizations to date and which agencies were most interested in possible inclusion in a pilot: the A.P. Randolph Institute, Black Coalition on Aids, and YMCA
- Feedback on which organizations to speak with to finalize the level of interest in a pilot (Southeast Health Center, Davis Senior Center, City of Dreams)
- Discussion about a general organizational structure illustrating how a pilot (and ongoing collaborative) might be organized and the roles and responsibilities of each
- Discussion of possible evaluation metrics and mechanisms
- Discussion about how to introduce the pilot to the community
- Discussion about the distinctions between a Board of Directors for fundraising and other high level purposes and making sure community representatives as well as users of our services are represented and empowered for their participation
- A Transportation Leadership Council that could also become involved in other activities beyond the shared van program

### **Consensus Decisions and Recommendations:**

- We will start to build a pilot program with those entities who are interested in participating
- We will outline both an operations and cost structure for the pilot in the Business Plan
- We will begin by using a Fiscal Sponsor who is expert at accounting, reporting, and other key legal, governance and management functions. There are several Fiscal Sponsors in San Francisco. This leaves an “Advisory Board” more available for community input and representation
- Additional information about why the Mission van was discontinued was requested

## **Meeting #6 – February 12, 2013**

### **Key Discussions and Themes:**

- Review of vehicle-sharing workshop and lessons learned
- Community trust and community champion are critical
- Early outreach and commitment improves later success of program

- Working Group Feedback to vehicle-sharing workshop
- Unique Bayview conditions including community disparities and severely disadvantaged populations
- First impression is critical
- Community Advisory Board will oversee program manager, both fiscal sponsor and program manager will supervise contract vendor.
- Importance of local drivers to meeting community capacity and cultural competency goals.
- Review of partner meetings and business plan update.
- A sample schedule includes:
  - Single use trips
  - Shared trips by several agencies
  - Availability for other trips
- The next steps in the implementation process including organizational responsibilities and funding requirements.

**Consensus Decisions and Recommendations:**

- Turnkey service will ensure timely start-up and high level of service.
- Research options to use local drivers in the pilot phase and beyond.
- Community outreach is critical to project's success – working group will lead outreach efforts. A fact sheet and training on how to communicate the project to interested community members will be devised by technical team.
- At the March meeting the working group will assume responsibility for continuing the process and create the next steps for the group.
- The working group approved the overall organizational structure of the community advisory board and will determine the individual composition of the board at a later date.



# Memorandum of Participation

The San Francisco County Transportation Authority (Authority), the San Francisco Department of Public Health (DPH), and the San Francisco Department of Children, Youth and Their Families (DCYF) seek to partner with interested community organizations and stakeholders to develop collaborative transportation strategies for the Bayview Hunters Point (BVHP) community. This process will take place through collaboration with the Bayview HEAL Zone initiative and the facilitation of a solutions-focused Community Transportation Working Group (Working Group). The Working Group will develop a business plan and implementation strategy for community-based transportation approaches in BVHP.

The purpose of this Memorandum of Participation is to outline expectations and requirements for formal participation in the Working Group by the undersigned organization.

## City and County Roles and Responsibilities

The Authority, DPH, and DCYF (collectively, the City Team) will provide staff and consultant resources to the Working Group to provide technical planning, funding, and intergovernmental expertise. The City Team will strive to be as efficient and streamlined as possible in partnering with Working Group participants. The City Team will provide facilitation of Working Group activities including calendared, agendaed meetings with production of technical deliverables.

## Participant Organization Roles and Responsibilities

In order to be successful, Working Group participant organizations will need to be meaningfully and substantively engaged in the process, in a good-faith and transparent manner. The undersigned organization agrees to the following:

- Designated staff person – a specific point-of-contact with sufficient seniority and institutional knowledge to participate in the process and function as the primary conduit for information sharing to and from the organization (e.g., manage review of interim deliverables as needed, and support the team in liaising with other organization staff). Participation in approximately 6 Working Group meetings.
- Periodic executive-level involvement – sufficient involvement and commitment from the organization’s management to the process as evidenced through: designation of appropriate staff participation; availability for approximately 2 briefings during the process to guide key milestones; and support for involvement/engagement of the organization’s Board of Directors.
- Access to other staff and information as needed – the designated staff person should serve to connect the Working Group process with key organization staff and information as necessary, such as meetings with operating or financial officers, fulfillment of planning data needs, etc.
- Board engagement – appropriate Board engagement to provide guidance and support for Working Group outcomes, supported by Executive Director-level staff involvement, as described above.

\_\_\_\_\_  
*Organization Representative – NAME and TITLE*

\_\_\_\_\_  
*City Staff Representative – NAME, AGENCY, and TITLE*

\_\_\_\_\_  
*Organization Representative – SIGNATURE*

\_\_\_\_\_  
*City Staff Representative – SIGNATURE*

\_\_\_\_\_  
*Organization Representative – DATE*

\_\_\_\_\_  
*City Staff Representative – DATE*

**APPENDIX C: PRELIMINARY SERVICE  
OPTIONS & ALTERNATIVES  
CONSIDERED**

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## INTRODUCTION

Consistent with the findings from the Neighborhood Transportation Plan, the Transportation Working Group determined that community transportation services should prioritize the youth and senior populations of the Bayview. Both of these groups have well documented needs, and the potential benefits from improving access to the Bayview's array of specialized programs and services for these populations are many. In addition to the obvious "baseline" of making more services available to more people, the potential for improved and more holistic outcomes – both in the short term and long term – is significant.

The Working Group reviewed a wide range of strategies which fall along a spectrum from small, initial changes to existing programs (which could be implemented quickly and easily) to larger strategies which would involve more significant shifts in how transportation and other services are organized and provided. By their nature, these larger, more comprehensive reforms would take longer to design and implement, and would require greater levels of partnering, funding, and operations management.

The Working Group decided to focus on short-range projects which improve utilization of existing resources as well as fill specific and well identified service gaps. If successful, these can be natural precursors to more complex programs and services which can more easily be developed once these first efforts have established credibility, and are providing improved mobility and customer satisfaction for patrons.

## YOUTH SERVICES

Several recurring themes around youth services and transportation needs in the community emerged. They include:

- A desire to pick-up from more schools in the city, particularly, in and near the southeast neighborhoods
- The need for safe passage to and from program activities, school, and home.
- The difficulties and challenges faced by youth on public transportation (e.g. intimidation from youth from other areas)
- Assistance in developing more efficient routes and operation of existing vans
- A need to control the amount of time spent keeping databases/permission slips current
- A desire to offer more field trips, particularly during holiday breaks and summer
- A need for more program capacity to reach more youth, to keep them engaged in program activities, and to reduce truancy among vulnerable groups, particularly for youth at public housing sites
- A need to be able to offer more local field trips (i.e., to local gardens, other destinations within the neighborhood and the city) where youth can both participate in programs and attend events
- A need to teach "transit etiquette" at an early age and encourage personal responsibility
- A desire to have various sizes of vehicles available for different trip types and patterns

Developing improved transportation services for youth can accomplish several goals. In addition to facilitating safe passage in and around the community, improved transportation should: encourage more youth to participate in constructive after school (and weekend) activities; provide more choices for parents and children as to program offerings; discourage negative behaviors

(such as truancy), which in turn, may improve public safety; and present an opportunity to encourage the use of transit as a lifelong habit. Lastly, more extensive and coordinated transportation resources could provide much-needed savings for families for whom paying for transit trips either on a per-fare or pass basis is a challenge.

## **Potential Strategies for Youth**

Transportation strategies for youth should focus on the following aspects:

- Improve efficiencies of current after-school pick-ups by various CBOs
- Provide safe passage from schools/homes to/from CBO programs
- Expand the number of youth served by expanding vehicle capacity and the number of schools and program sites served
- Lower overall costs for CBOs
- Increase the availability of “charter” services for more field trips for CBOs
- Enable staff to reduce amount of time spent on transportation coordination and delivery
- Assist in the acquisition and maintenance of fleets

Potential service options that were considered are summarized below.

### **Fixed Route Service**

One alternative is to establish a youth service which would operate on weekdays between approximately 2:30pm and 7:30pm. This service would pick youth up at designated schools and other origins along one or two routes in Bayview Hunters Point, dropping them at participating after school programs and/or housing locations. At the end of the evening, buses would transport youth from the after school programs to their homes.

This would enable participating CBOs to extend their “reach” to more schools (e.g., within the neighborhood and to schools in adjacent neighborhoods) for program participation, as well as to reduce both direct and indirect costs associated with existing services. Partnering with other agencies and having transportation become a specific budgetary line item may also allow them to more easily seek sustainable funding for their share of the program. This service would also be made available to provide transportation for parents and their children to and from occasional PTA, Back to School, and other such meetings.

### **Charter Bus**

Negotiating with one or more charter services for “volume discounts” that would be made available to the various participating CBOs for summer and holiday trips would lower the costs of field trips. Each agency could develop overall parameters and a master calendar which would be the framework of an agreement with the charter provider(s); each agency would be responsible for booking and billing on a per-trip basis.

This strategy addresses the CBOs’ goals of increasing capacity for more field trips and lowering overall costs.

### **Fleet Consultative Services**

This strategy would offer professional fleet cost analysis as well as consultation on cost effective maintenance strategies, vehicle acquisition (types and number in the fleet), and other fleet management issues.

Providing community-wide youth “after school” service and increasing the ability of CBOs to use charter buses for more field trips would result in decreased utilization of the fleets of private vans currently used for these purposes and thereby necessitate re-deployment of those services. This strategy addresses the desire for professional assistance in vehicle acquisition, maintenance and management. This strategy should also achieve lowering overall costs of providing service. It could be implemented regardless of whether a dedicated community-wide service were provided.

### **Car-Share Vehicles**

Another possibility is a community vehicle (or vehicles), that would operate on a shared basis among participating CBOs. These vehicles would be used to more economically transport “case management” clients to and from daytime appointments, and for other such trips where greater capacity is neither wanted nor needed. CBOs would benefit from paying only for time actually used, and at a lower operating cost than their existing vans. This would also reduce the need for staff to use their private vehicles for such trips.

This strategy addresses improved operating efficiencies (and cost savings).

### **Other Support Services**

Integral to the success of an “after school bus” service would be organization and marketing. An essential program component would entail extensive marketing to schools and families. Streamlined processes for permission slips and other specific rider criteria would be developed.

A new organizational structure for the “charter service” bank would also be developed that CBOs would use to check availability, book services, communicate with others (i.e., for trips open to other agencies), etc.

A centralized youth database would also be necessary whereby parents approve their child(ren) being picked up and dropped off at specific locations and on which days (i.e., pick up from a particular school; drop at Boys Club on Mondays; YMCA on Wednesdays; etc.). This database could be updated by parents 24/7 via computer; at CBO sites; or at area schools. CBOs and schools would have access and the ability to add information as needed. This database may also be utilized by others such as DCYF and the School District and could report on both transportation and non-transportation utilization for the benefit of all participating partners.

This would significantly reduce the amount of time CBOs currently spend updating their records. The shuttle driver would be furnished with the records showing which youth are supposed to be riding the bus at what times and where they should be going. It removes barriers for parents and greatly improves flexibility and choices for youth while assisting with control and safe passage.

Careful attention to these supporting services and details would be a key factor in the success of any new programs.

## **SENIOR SERVICES**

Interviews identified several recurring gaps in existing services for seniors. Among them are:

- A desire for a “pharmacy run” to the DPH-approved Walgreen’s located at 776 Market Street
- Direct service from the SEHC clinic to San Francisco General on a regular schedule
- Greater coordination in arranging transportation as patients make appointments, (e.g., at SEHC, SFGH), whether it is paratransit, public transit, or a shuttle service
- Improved training of medical and social service agency personnel about transportation options and information
- Ongoing promotion of services available to educate the community
- Separation of seniors from youth for specialized transportation
- Links between medical, social, and food destinations including Farmers Markets, food distribution centers (i.e., at the YMCA), and other destinations
- Same-day appointments
- Enhancements desired for the Shop-a-Round grocery shuttle (e.g., go to Farmer Markets; lower eligibility age from 62 to 55 if possible).
- Fixed route service needs to be reliable
- Non-fixed route service should include some door-to-door and door-through-door capabilities

Paratransit service provides limited, often inadequate, door-to-door services. Limiting factors include eligibility barriers, advance reservation requirements and requiring additional “door through door” services.

A robust transportation program for seniors would need to take into account complex and variable trip types and patterns needed by seniors to remain engaged in the community and receive a full array of medical and other services.

## Potential Strategies

- Improve access for specialized medical trips and reduce the number of missed appointments attributed to transportation issues
- Increase access to existing services for seniors, utilizing the Senior Center

### Strategies for Small, Specialized Access to Medical Care

The SEHC reports that most patients reach the clinic on their own. Some drive. Some take transit. Others are dropped off by family or friends, or utilize taxis. However, there are a limited number (up to 10) of “same-day” appointments made daily and a handful of patients need either door-to-door or door-through-door assistance to receive medical care. These patient groups can best be served in smaller vehicles as there would rarely be more than 2-3 people per trip and the hours of operation would be limited. Aside from eligibility requirements, paratransit requires advance reservations and is limited to either curbside or door-to-door service.

Two potential concepts for service delivery could accommodate this niche population.

- The first is a volunteer driver program and work closely with the Front Desk as appointments are made. There are several iterations of a volunteer driving program that may be applicable to the Bayview’s needs.

- The second is to model an on-demand program after the successful 8-to-Go Senior and ADA service in Emeryville. This program utilizes a mini-van (with ramp) to provide service. Customers call the driver, who is also the dispatcher, directly to arrange their rides and appointments may be made ahead of time or on the same day.

Either of these strategies fills current service gaps for both those patients needing same day service for medical purposes and those needing a higher level of service.

### **On Site Mobility Management at the SEHC**

SEHC indicated that medical and support staff could benefit greatly from transportation and travel training. These personnel are on the front line with patients and should be able to inform them of transportation options that will help improve medical outcomes. Staff can also easily refer patients immediately and directly to a Mobility Manager who can assist them. To this end, a Mobility Manager would work closely with the Front Desk and other staff in arranging appropriate transportation services as appointments are made. The Mobility Manager would conduct travel training for customers and otherwise assist them as needed; train SEHC professional staff about the transportation resources available; and promote all of the Bayview's transportation and mobility programs at the medical clinic.

All of the medical-based strategies would work to improve specific health outcomes for the senior population through more consistent and comprehensive treatments as a result of improved access. This should also reduce the “no show” rate of medical appointments.

### **Group Trips**

Helping the elderly get out and about – for socializing at community centers as well as for day-trips, is an important transportation service. To provide this service, either the failed Health Shuttle model could be adapted or the Senior Center (and others) could have access to a “group Charter rate” service as discussed in the Youth Services section. This would enable more field trips from the Senior Center (as well as other locations); it could also bring people to the Senior Center (and other locations) in order to participate in group services such as the grocery shuttle; to special events (i.e., Asthma Walks, mammography screenings, Monday night jazz, Friday nights at the Opera House and other community events).

These strategies maximize utilization of existing resources, combat social isolation issues, and allow service providers to offer more field trips and other important programs.

## **MOBILITY MANAGEMENT AND TRANSPORTATION DEMAND MANAGEMENT**

Mobility Management can be defined as an approach for managing and delivering coordinated transportation services to customers. Changes in demographics, shifting land use patterns, and the creation of new and different job markets require new approaches for providing services, particularly for customers with special needs. Mobility management focuses on meeting individual customer needs through a wide range of transportation options and service providers. It also focuses on coordinating these services in order to achieve more efficient service delivery. With its approach of offering a “family” of services to customers, mobility management is customer-driven and incorporates many options, services, and modes working together to meet individual travel needs.

The concept of a Mobility Manager for the Bayview is intriguing, and such a pilot would be a “work in progress.” Because the needs are great and resources are limited, it would be important to prioritize achieving a few, very specific goals at the outset, adding to the programs as the program develops history, capacity, and builds credibility in the community and with community partners.

As noted in previous sections, despite some serious gaps, the Bayview does have a fairly high level of service available. However, there has been no concerted, coordinated marketing of these services, and there is a decided lack of awareness about the full range of services as well as how to access them. Educating the multifaceted community about both new and existing services is at the core of Mobility Management. Training customers how to take advantage of the services and resolving problems quickly and efficiently is another essential Mobility Management role. One of the most important aspects of a Mobility Manager is the ability to offer the ease and convenience of a “one stop shop” for all transportation needs to Bayview residents, particularly those facing significant mobility challenges.

A mobility management program in the Bayview would need to be designed to directly impact the following priorities identified by the community:

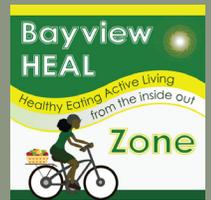
1. Reduce the costs associated with providing transportation services while increasing collective capacity through shared services
2. Reduce the level of staff involvement in daily transportation operations, maintenance, and administration and customer service
3. Foster increased use of public and community transportation resources among youth and older adults through the provision of high quality, reliable services
4. Foster respect and appropriate behaviors and etiquette towards others and vehicles while using transit and other modes
5. Improve health and wellbeing outcomes for both youth and senior populations.
6. Provide safe passage for BVHP youth and seniors
7. Build a close, working relationship with SFMTA and paratransit to improve utilization and customer satisfaction of existing paratransit, shopper shuttle, and fixed route transit services
8. Develop and maintain a transportation website for the Bayview with multi-lingual capabilities
9. Conduct regular marketing and outreach at medical sites, community events and organizations, public and private housing sites; market in English, Spanish, and Cantonese (at minimum)
10. Conduct travel training for customers and agencies as needed
11. Monitor the utilization, cost, and efficiency and quality of youth and senior transportation services for further refinement and scaling
12. Provide services that reflect – and are sufficiently flexible to respond to – the changing demographics and needs of the Bayview

# **APPENDIX E: VEHICLE-SHARING WORKSHOP INVITATION AND PROGRAM**

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# Bayview Hunters Point Mobility Solutions Study Vehicle-Sharing Workshop



Get inspired and learn from active vehicle sharing programs as we refine plans for a potential new community based van sharing program in the Bayview!

A panel of speakers will join us in the morning to share their experiences launching and managing vehicle sharing programs in locations throughout the Bay Area and beyond. The afternoon program will be an interactive discussion among local experts, Transportation Working Group members and the panel about applying lessons learned from other efforts to the proposed Bayview Hunters Point pilot program.

Peer panelists will include:

**Ronny Kraft**, *San Mateo County Transit District*

Manages Peninsula Fleet Share, a vehicle sharing demonstration program that helps organizations better serve the transportation needs of their clients and realize cost savings.

**Ross Peterson**, *Ride Connection, Portland, OR*

Operates a shared and retired vehicle program that links vehicles to community needs while providing the oversight needed to manage risk and to ensure safety and accountability.

**Tom Roberts**, *Napa County Transportation and Planning Agency*

Launched shared vehicle programs for non profit organizations that serve the elderly and/or disabled in Santa Barbara and Napa County.

Please RSVP by February 4, 2013 to:

Becca Homa  
becca.homa@sfcta.org  
415-593-1668

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Friday, February 8, 2013  
10:00 am – 2:00 pm

Bayview Opera House  
4705 3rd Street  
San Francisco, CA 94124

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## PROGRAM:

9:30 AM – 10:00 AM  
Registration

10:00 AM – 12:00 PM  
Peer Panel

12:00 PM – 12:30 PM  
Lunch

12:30 PM – 2:00 PM  
Discussion of Potential Pilot

A light breakfast and lunch  
will be served.





# Bayview Hunters Point Mobility Solutions Study

## Vehicle-Sharing Workshop

# PROGRAM

Friday, February 8, 2013  
10:00 am – 2:00 pm  
Bayview Opera House

4705 3rd Street  
San Francisco, CA



## MORNING PROGRAM

### INTRODUCTIONS AND OVERVIEW

10:00 – 10:30 am

- » **Jesse Koehler**, San Francisco County Transportation Authority
- » **Christina Goette**, San Francisco Department of Public Health

Overview of the potential Bayview Hunters Point Community-Based Van Sharing Pilot Program

### PEER PANEL

10:30 AM – 12:00 PM

Facilitator:

- » **Naomi Armenta**, Mobility Manager, Alameda County Transportation Commission, CA

Panelists:

- » **Tom Roberts**, Napa County Transportation and Planning Agency, CA
- » **Ronny Kraft**, San Mateo County Transit District, CA
- » **Ross Peterson**, Ride Connection, Portland, OR

Panelists from three active vehicle sharing programs in California and Oregon will each give an overview of their services, followed by a question and answer period.

See reverse for brief descriptions of these programs.

## LUNCH

12:00 PM – 12:30 PM

## AFTERNOON PROGRAM

### ROUNDTABLE DISCUSSION

12:30 PM – 2:00 PM

Local experts, Transportation Working Group members, agency staff and panel members will discuss how lessons learned during the morning session inform the potential Bayview Hunters Point Community-Based Van Sharing Pilot Program.

# PEER PANELIST PROGRAM DESCRIPTIONS

## SHARED VEHICLE PROGRAM, NAPA COUNTY TRANSPORTATION AND PLANNING AGENCY, CA

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Napa County Transportation and Planning Agency (NCTPA) sponsors a “shared vehicle program” expressly for 501(c)3 organizations that serve the elderly and/or disabled. The program was launched in July 2012. In brief, roles are delineated as follows:

- » Non-profit provides driver, who must be covered by the non-profit’s workers compensation policy, liability insurance, and pays for gasoline
- » NCTPA provides the vehicles, auto insurance, driver training

In 1991, Tom Roberts also established a successful shared vehicle program in Santa Barbara, CA as the Director of the Consolidated Transportation Service Agency (CTSA). Today that program is utilized by approximately 20 non-profit organizations.

The Napa County Transportation and Planning Agency is the countywide transportation planning agency and congestion management agency.

## PENINSULA FLEET SHARE, SAN MATEO COUNTY TRANSIT DISTRICT, CA

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Peninsula Fleet Share is a vehicle sharing demonstration program aimed at facilitating vehicle sharing partnerships among public, private, and nonprofit entities. The goal of the program is to help organizations better serve the transportation needs of their clients and/or realize cost savings through more efficient use of current vehicle capacity. This 18-month pilot program is operated by the San Mateo County Transit District through a combination of New Freedom grant and District matching funds. For more information please visit [www.peninsulafleetshare.com](http://www.peninsulafleetshare.com).

The San Mateo County Transit District is the administrative body for the principal public transit and transportation programs in San Mateo County.

## SHARED AND RETIRED VEHICLE PROGRAM, RIDE CONNECTION, PORTLAND, OR

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Ride Connection’s shared and retired vehicle program was implemented to provide a high-quality, cost effective alternative to ADA paratransit while maximizing vehicle utilization within Ride Connection’s network of partners. The program uses retired vehicles from Ride Connection’s door to door transportation program. The program is flexible and highly customized to meet the individual needs of their service partners. Vehicles can be placed permanently, or can be made available on an ad hoc basis. The objective of the program is to link vehicles to community needs while providing the oversight needed to manage risk and to ensure safety and accountability. It is estimated that the vehicle sharing program saves TriMet over \$3.5 million per year through cost avoidance. The program is funded by TriMet with a combination of local, state and federal funds.

Ride Connection is a non-profit organization based in Portland, Oregon that works with community partners to link accessible responsive transportation with community needs. Ride Connection was launched over 25 years ago as an effort spearheaded by TriMet, the public transit agency, to expand transportation options for seniors and people with disabilities. Initially, Ride Connection provided shared supports to strengthen the work of community-based volunteer driver programs. Over time, additional services were added to extend the capacity of local human service agencies to improve access and mobility. Today, their programs consist of a wide range of efforts aimed at maximizing mobility and independence for their customers. Included in this mix is a vehicle sharing program, a coordinated call center, volunteer driver training, risk and operations management support, grant management, and travel training, among other services. In the most recent fiscal year the Ride Connection network provided over 400,000 trips and travel trained over 230 independent travelers.