

## **NOTICE OF PROPOSED GUIDANCE DOCUMENT**

DTIM BTLRRH 73

Pursuant to Wis. Stat. s. 227.112, the Wisconsin Department of Transportation is hereby seeking comment on DTIM BTLRRH 73, 49 U.S.C. 5310, a proposed guidance document.

### **PUBLIC COMMENTS AND DEADLINE FOR SUBMISSION**

Comments may be submitted to the Wisconsin Department of Transportation for 21 days by:

1. Department's website: <https://appengine.egov.com/apps/wi/dot/guidance-docs?guidDocId=DTIMBTLRRH73>

2. Mailing written comments to:

Division of Transportation Investment Management  
Wisconsin Department of Transportation  
4822 Madison Yards Way  
PO Box 7913  
Madison, WI 53707- 7913

### **WEBSITE LOCATION OF FINAL GUIDANCE DOCUMENT**

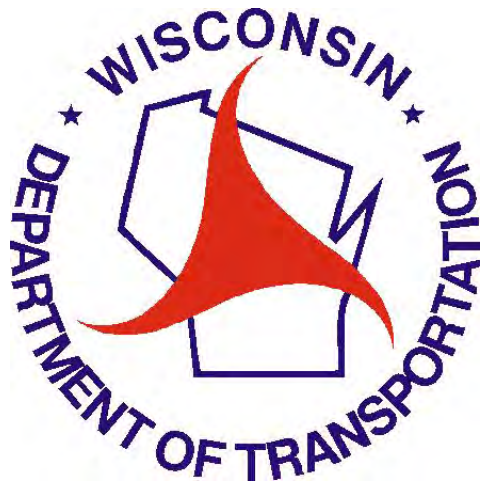
The final version of this guidance document will be posted at [wisconsindot.gov](http://wisconsindot.gov) to allow for ongoing comment.

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# Mobility Management Practices in Wisconsin

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**Bureau of Transit, Local Roads, Railroads and Harbors**

**Wisconsin Department of Transportation**

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## **Acknowledgements**

The Wisconsin Department of Transportation (WisDOT) would like to thank Wisconsin mobility managers and organizations for answering questions and providing valuable information about mobility management practices in Wisconsin.<sup>1</sup>

WisDOT would also like to thank individuals from Florida, Iowa, Minnesota, Ohio and the National Center for Mobility Management for insight into mobility management practices in other states and national organizations.<sup>2</sup>

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<sup>1</sup> See Appendix 1

<sup>2</sup> See Appendix 2

## **Executive Summary**

The Transit Section of WisDOT conducted a mobility management research project in order to obtain a comprehensive understanding of mobility management practices in Wisconsin. To obtain information from Wisconsin entities, an online survey was conducted of Wisconsin mobility managers and counties. Telephone interviews were then used to follow up and obtain more detailed responses. As part of the research project, WisDOT was also interested to learn more about mobility management practices in other states and nationally. To obtain this information, telephone or email interviews were conducted. This report presents the information obtained in those surveys and interviews as well as background mobility management information.

Specific information about Wisconsin includes mobility management services, coverage areas, partnerships, funding, barriers and opportunities. Primary services were identified as coordinating services or programs and identifying customer needs, along with a number of others. An analysis of the location of services showed fairly comprehensive coverage of services in many areas of Wisconsin. Service gaps were shown to exist primarily in eastern and north central Wisconsin counties with training services being the least comprehensive compared to other services. Possible partnerships were noted to exist primarily with non-profits and public agencies.

Funding for mobility management was identified to be primarily from federal sources such as the Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities program and state sources such as the County Elderly and Disabled Transportation Assistance program funded under s. 85.21 stats. Funding was identified as the largest barrier to improved mobility management. Additional barriers include, but are not limited to, lack of coordination and collaboration, service and jurisdictional boundaries, and lack of information. Opportunities were identified in areas of coordination and collaboration, regional mobility management, enhanced transit and shelters, new or expanded projects, and volunteers. When obtaining information from other states and national organizations, WisDOT specifically focused on mobility management definitions, structures, funding and barriers. The definitions of mobility management and structure varied by state. Some states, such as Iowa, have specific mobility management programs, while other states, such as Florida, don't have written mobility management definitions or specific programs but do have a commission that provides similar services. Funding is similar to Wisconsin in that it primarily comes from federal Section 5310 and New Freedom programs. Some of the barriers are also similar to Wisconsin such as funding, lack of coordination and collaboration and lack of information. The structure of mobility management programs was also identified as an additional barrier.

Best practices were obtained from Wisconsin, other states and national organizations. They include types of state and local programs, examples of coordination and collaboration, technology, marketing and training, and education. In order to determine recommendations for further action, WisDOT policy goals and objectives of efficiency, effectiveness, equity and feasibility were drawn up. Once goals were clearly defined, the existing conditions were analyzed versus the policy goals in order to derive recommendations for further action. These strategies for further action include addressing the barriers of lack of coordination and collaboration and information.

## **Introduction**

Mobility management can assist in meeting the needs of the transportation disadvantaged and other individuals through coordinated and efficient transportation systems. The process focuses on identifying customer needs, brainstorming solutions, working with partners to form solutions and gaining feedback from customers.<sup>3</sup> In order to obtain a more comprehensive understanding of the current status of mobility management in Wisconsin, the Transit Section of WisDOT conducted a research project to analyze and evaluate practices in the state. Through this research project, WisDOT was also interested to learn more about mobility management practices in other states and national organizations. This report presents background information, Wisconsin mobility management practices, mobility management practices in other states and national organizations, best practices and policy goals. It concludes with recommendations for further action that could advance mobility management in the state.

## **Background**

### The Mobility Management Concept

Mobility management is an innovative approach for managing and delivering coordinated transportation services to customers. These customers include, but are not limited to the transportation disadvantaged such as seniors, individuals with disabilities and individuals with lower incomes. 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 and providers in an effort to achieve a more efficient transportation delivery system.

### *Services*

Mobility managers provide a variety of services to assist people with transportation needs. These services can include, but are not limited to:

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<sup>3</sup> “Module 1: What is Mobility Management,” *National Center for Mobility Management*, accessed May 2015, <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3179&z=95>.

- Conduct needs assessment<sup>4</sup>
- Coordinate funding
- Coordinate services or programs
- Develop inventory of available services
- Develop strategies to meet customer needs
- Identify customer needs
- Promote collaboration
- Train volunteers
- Transportation marketing
- Travel training<sup>5</sup>
- Trip planning

### *Mobility Management Service Providers*

Mobility managers are employed by a variety of organizations including, but not limited to, aging and disability resource centers (ADRCs), local public bodies, transit systems, human service and social service agencies, independent living centers, employment and community action programs and economic opportunity councils.

### *Mobility Management Benefits*

General benefits of mobility management include simplified access to transportation, increased awareness of transportation options, increased transit ridership, reduced service gaps and overlap and increased efficiency.<sup>6</sup> Mobility management can provide the transportation disadvantaged with access options to health care, employment, social services and amenities.<sup>7</sup>

### Mobility Management at the National Level

There are a number of federal and national organizations that provide mobility management services or advocate for the growth of the mobility management concept.

### *Federal Interagency Transportation Coordinating Council on Access and Mobility (CCAM)*

CCAM was established in 2004 by executive order of President George W. Bush with the understanding that the development, implementation and maintenance of comprehensive, coordinated community transportation systems is essential for seniors, individuals with disabilities and individuals with lower incomes to fully participate in their communities. The purpose of CCAM is to oversee activities and make recommendations to further the goals of enhancing access to transportation, reducing duplication and overlap of transportation services, streamlining federal rules and regulations that impede coordinated delivery of services, improving efficiency of services using existing resources and promoting interagency cooperation. The council is chaired by the Secretary of Transportation and comprised of

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<sup>4</sup> Jeremy Mattson, "Evaluating the State of Mobility Management and Human Service Transportation Coordination" (presentation, 21<sup>st</sup> National Conference on Rural Public & Intercity Bus Transportation, Monterey, CA, October 26-29, 2014), <http://www2.ku.edu/~kutc/cgi-bin/trbconference21/presentations.php>.

<sup>5</sup> Mary Handley, "Person Centered Mobility Service in a Rural Agricultural Environment: The Role of Mobility Managers in Day-to-Day Operations" (presentation, 21<sup>st</sup> National Conference on Rural Public & Intercity Bus Transportation, Monterey, CA, October 26-29, 2014), <http://www2.ku.edu/~kutc/cgi-bin/trbconference21/presentations.php>.

<sup>6</sup> Jeremy Mattson, "Evaluating the State of Mobility Management and Human Service Transportation Coordination."

<sup>7</sup> National Center for Mobility Management, "Performance measures in Mobility Management: Experience from the Field," Webinar, May 22, 2014, <http://nationalcenterformobilitymanagement.org/ncmm-webinars/>.

Secretaries of Health and Human Services, Education, Labor, Veterans Affairs, Agriculture, Housing and Urban Development and the Interior, as well as the Attorney General and the Commissioner of Social Security Administration.<sup>8</sup>

### *United We Ride*

United We Ride is a federal interagency initiative created by CCAM to facilitate coordination between transportation and human service programs to advance the council's mission. United We Ride works with states and communities to identify transportation service gaps and needs, reduce transportation duplication, create efficient services, provide assistance in building local partnerships and develop coordination plans. Specific goals are to provide more rides for targeted populations, simplify customer access to transportation and increase customer satisfaction.<sup>9</sup>

### *Mobility Services for All Americans (MSAA)*

MSAA was launched by the USDOT Intelligent Transportation Systems (ITS) Joint Program Office in 2005 as part of the United We Ride campaign. Its goal is to join communities together in a coordinated effort to improve transportation services and access for the transportation disadvantaged through ITS technology. MSAA works to integrate ITS technology into physical or virtual Travel Management Coordination Centers. These centers network all parties and use ITS technology for fleet scheduling, dispatching and routing, integrated fare payment and management systems, trip planning systems, advanced GIS and demand-response systems.<sup>10</sup>

### *National Center for Mobility Management (NCMM)*

The NCMM is an initiative of United We Ride whose mission it is to work with communities to adopt transportation strategies and mobility options. It is supported through a cooperative agreement with the Federal Transit Administration (FTA) and operated through a consortium of three members: the American Public Transportation Association (APTA), the Community Transportation Association of America (CTAA) and the Easter Seals Transportation Group. The activities of NCMM are to provide assistance to communities through NCMM regional liaisons, a peer-to-peer network, short-term technical assistance, web resources and phone and email support. NCMM also provides in-person and virtual training, a monthly e-newsletter, webinars and conference calls; and collaboration with mobility managers.<sup>11</sup>

### *Partnership for Mobility Management*

The Partnership for Mobility Management, a joint effort of mobility management professionals and national organizations, works to improve transportation options for all Americans. It is

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<sup>8</sup> U.S. President, Executive Order, "Human Service Transportation Coordination, Executive Order 13330," Federal Register 69, no. 38 (February 26, 2004): 9185, <http://www.gpo.gov/fdsys/pkg/FR-2004-02-26/pdf/04-4451.pdf>.

<sup>9</sup> "United We Ride", *United We Ride* (2007), [http://www.unitedweride.gov/United\\_We\\_Ride\\_Brochure.pdf](http://www.unitedweride.gov/United_We_Ride_Brochure.pdf).

<sup>10</sup> "Mobility Services for All Americans (MSAA)," *United States Department of Transportation*, last modified June 19, 2015, <http://www.its.dot.gov/msaa/>.

<sup>11</sup> "About Us," *National Center for Mobility Management*, accessed April 2015, <http://nationalcenterformobilitymanagement.org/about-us/>.

managed by the CTAA. Members include: the American Association of State Highway and Transportation Officials, the American Bus Association, the Association for Commuter Transportation, APTA, Easter Seals Project ACTION and the Taxi, Limousine and Paratransit Association. Individuals can also join and network with mobility managers around the country. The Partnership for Mobility Management hosts conferences, provides information about technical assistance, conducts webinars and training, and provides a list of current local mobility management websites by state.<sup>12</sup>

#### *Veterans Transportation and Community Living Initiative (VTCLI)*

The VTCLI is supported by members of CCAM and managed and administered by the FTA. It draws on existing federal resources and works with advocates for veterans and individuals with disabilities to promote one-call information centers and uses other tools to improve transportation access and services for veterans and military families.<sup>13</sup>

#### *Veterans Transportation Service (VTS) Program*

VTS is a Department of Veterans Affairs (VA) pilot program that focuses on transportation to VA medical centers for veterans in rural areas. Through joint efforts with the VA's Office of Rural Health, Veterans Service Organizations, transportation agencies/providers, non-profits and VTCLI grantees, the program works to establish mobility managers at local VA facilities to assist veterans with transportation needs.<sup>14</sup>

#### An Overview of Mobility Management in Wisconsin

This section provides a brief overview of the history, funding and current status of mobility management practices in Wisconsin. An in-depth analysis will be presented in a subsequent section entitled Mobility Management in Wisconsin: Findings and Analysis.

#### *History*

Mobility management in Wisconsin unofficially began in October 2005 when the Interagency Council on Transportation Coordination (ICTC) was formed. Part of the council's mission was to develop a state model of coordination. The following year, through the 2006 Coordinated Public Transit – Human Services Transportation planning process, mobility management was identified as one of eleven priorities in most areas of the state. In 2007, the ICTC sponsored a conference to raise awareness of the council and its mission to improve coordination and access to transportation for transportation disadvantaged individuals in Wisconsin. Also in 2007, WisDOT sponsored two sessions of the National Transit Institute's "Coordinated Mobility" course to

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<sup>12</sup> "About the Partnership," *Partnership for Mobility Management*, accessed April 2015, <http://web1.ctaa.org/webmodules/webarticles/anmviewer.asp?a=3007&z=95>.

<sup>13</sup> "Veterans Transportation and Community Living Initiative," *U.S. Department of Transportation Federal Transit Administration*, accessed April 2015, [http://www.fta.dot.gov/grants/12305\\_13540.html](http://www.fta.dot.gov/grants/12305_13540.html).

<sup>14</sup> "Veterans Transportation Service (VTS)," *U.S. Department of Veterans Affairs*, last modified June 3, 2015, [http://www.va.gov/HEALTHBENEFITS/vtp/veterans\\_transportation\\_service.asp](http://www.va.gov/HEALTHBENEFITS/vtp/veterans_transportation_service.asp).



introduce the concept of mobility management to transportation providers at the community level. During this time, the New Freedom program continued to develop, and funds were added to the first grant cycle in fall 2007. Those funds could be used for mobility management projects in rural areas implemented in 2008. In 2008, there were 29 mobility managers in the state; 16 hired with funds obtained through the first New Freedom grant cycle, nine funded by the Wisconsin Employment Transportation Assistance Program (WETAP) and four funded by the Supplemental Transportation Rural Assistance Program (STRAP).

In 2008, WisDOT developed a formal training program to provide organized and efficient training and resources to assist the growing number of mobility managers. This training program was funded 100 percent by WisDOT and delivered by a consultant who could provide expert guidance and training. Multiple-day workshops were hosted over the next two years. Training topics included coordination, funding, program types, collaboration, partnerships, best practices and travel training. The results of the training were increased effectiveness and efficiency, increased education and resource awareness, knowledge of funding options and increased transportation coordination.

In 2009, mobility management projects and transportation coordination in the state continued to increase, and WisDOT created the Wisconsin Mobility Management certification program. Certification requirements included core curriculum, supplemental curriculum, one year of practice, peer sharing and a final exam. WisDOT took the lead to get the program started and then passed it along to the Wisconsin Association of Mobility Managers (WAMM). WAMM was created and incorporated by certified mobility managers and continues to provide mobility management certification, resources and advocacy.

### *Funding*

Mobility management projects have previously been funded through New Freedom, WETAP and STRAP. The Federal Moving Ahead for Progress in the 21<sup>st</sup> Century Act (MAP-21) repealed the New Freedom and Job Access Reverse Commute (JARC) programs, the latter of which contributed the federal funds component of WETAP. Currently, mobility management projects are eligible for funding under the Section 5310 program and the Section 5311 Federal Formula Grant Program for Rural Areas. Approved projects for 2015 included the funding of 15 mobility management projects through Section 5310 and two through 5311.

### *Current Status*

WisDOT continues to support the increased growth and efficiency of mobility management practices in the state and continues to work on expanding knowledge about the mobility management concept. That said, the direction that mobility management projects take in Wisconsin is a local decision and is not limited or mandated by WisDOT other than to ensure project eligibility according to the applicable funding source.

Figure 1 shows the coverage of mobility management services in Wisconsin that are funded by Section 5310. It does not provide information about the coverage of mobility management services that are funded in other ways. It also does not show coverage of those who may be providing mobility management services, but are not termed mobility managers. That information is provided and discussed in subsequent sections.

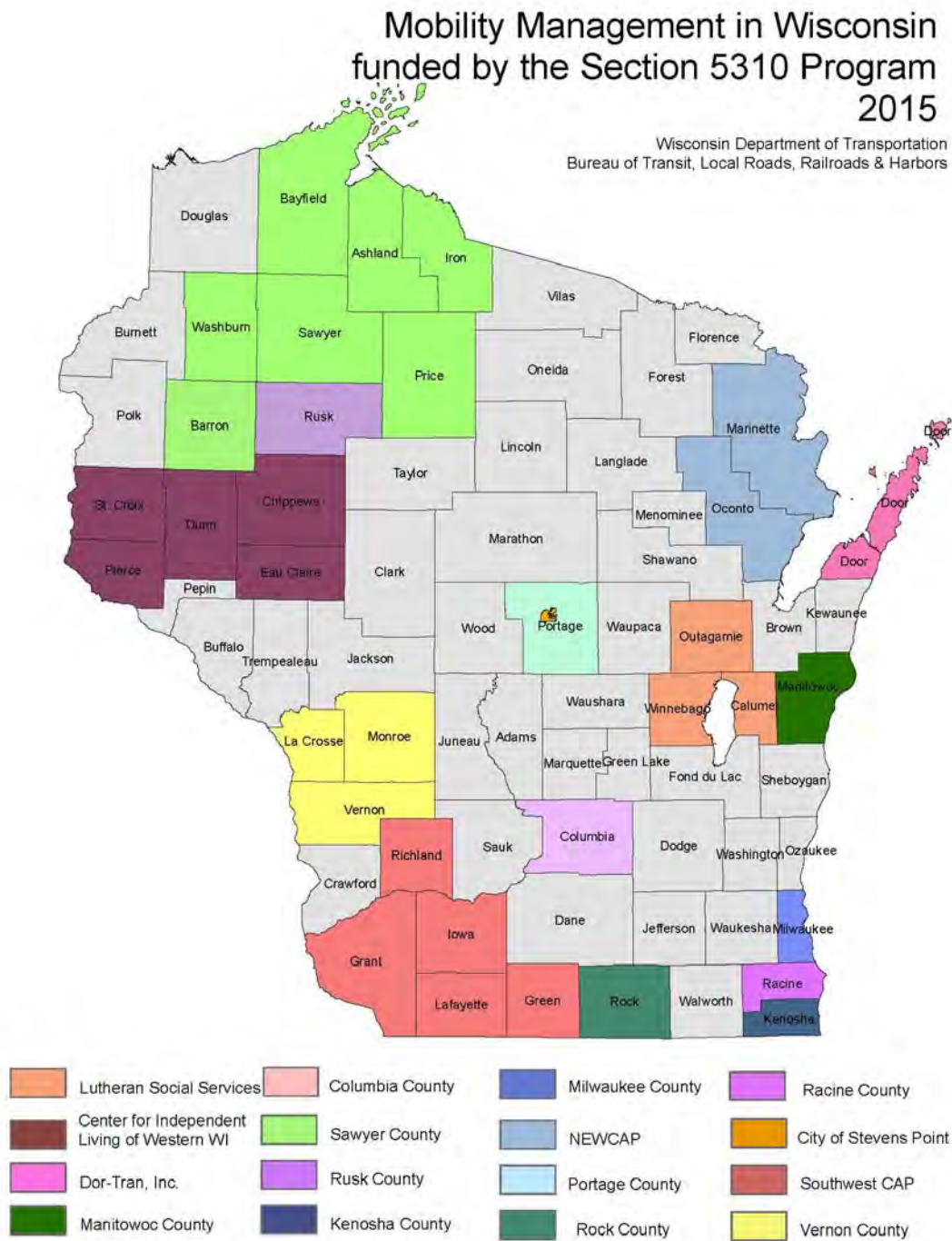


Figure 1. Coverage of Wisconsin Mobility Management Funded by Section 5310

## Methodology

### Information Collection Method

#### *Background Information*

Background information for this report was gained through review of relevant sources including online documents, websites and webinars. These sources provided general information about mobility management services, providers, benefits and national level programs.

#### *Surveys*

Surveys were conducted to gather information from Wisconsin mobility managers, Wisconsin s. 85.21 funding recipients (counties) and other states and national organizations. Questions for Wisconsin mobility managers focused on certification status, services, service areas, funding, partnerships, barriers, opportunities and successful strategies.<sup>15</sup> Questions for counties sought information about mobility managers with regard to staff and certification, services, title of person who provides the service, service areas, organizations in the area providing mobility management services, mobility manager funding and barriers.<sup>16</sup> Questions for other states and national organizations were similar to those for Wisconsin mobility managers, but also sought information about how mobility management is defined and structured. Questions about the relationship between the state DOT and mobility management were also included.<sup>17</sup>

Online surveys and phone or email interviews were the chosen method to conduct the surveys. The online survey method was used for Wisconsin entities because it allowed WisDOT to efficiently gain information from a large number of people. Separate online surveys went out to Wisconsin mobility managers and Wisconsin counties. In the Wisconsin mobility manager online survey, participants could state whether or not they would be willing to participate in a follow-up phone interview. Follow-up phone interviews were then conducted with some of the participants to obtain more detailed responses. For other states or national organizations, since there were fewer participants, phone or email interviews were the chosen method rather than an online survey. An initial email was sent to the chosen participant to introduce the project and inquire as to whether they would be willing to answer a few questions through email correspondence or a phone interview. After receiving a response, the questionnaire was sent along with the email to schedule the phone interview if that was the participant's preferred method. Sending the questionnaire before the phone interview allowed the participant to get an idea of the information that WisDOT was hoping to gather. For participants who chose to correspond through email, the Word document questionnaire was filled out by the participant and returned via email.

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<sup>15</sup> See Appendix 3

<sup>16</sup> See Appendix 4

<sup>17</sup> See Appendix 5

### *Participants*

The Wisconsin mobility manager survey was sent to 34 recipients, and the Wisconsin counties survey was sent to 70 recipients.<sup>18</sup> The Wisconsin mobility manager survey recipients were determined by the WisDOT list of Section 5310 mobility management projects and a list of WAMM members. Participants came from a range of organizations including community action programs, ADRCs/aging units, transportation providers, social and human service organizations or agencies, the VA, regional planning commissions and independent living centers. The county recipients were determined by the main contact for the s. 85.21 funds. Eighteen complete survey responses were obtained from the Wisconsin mobility manager survey. From the Wisconsin county survey, 31 complete responses were obtained, 13 of which it was determined were completed by mobility managers. Participants from other states and national organizations were chosen based on location and research. States in the region were chosen due to proximity and ongoing relationship. Other states were chosen based on research that showed a strong mobility management presence. Emails were sent to specific individuals based on this. From responses to those emails, WisDOT conducted surveys of Florida, Iowa, Minnesota, Ohio and the NCMM.

### *Limitations*

WisDOT recognizes that there are certain limitations that must be taken into account. The findings and analysis are based on the results of an optional survey, and therefore, may not encompass all mobility management practices that are occurring in the state.

### Analysis Method

Upon completion of the surveys, information was compiled into categories to facilitate analysis. The categories for Wisconsin responses included services, coverage areas, mobility management service providers and their titles, partnerships, funding, barriers, opportunities and best practices. Wisconsin mobility manager survey responses, as well as the mobility manager responses to the Wisconsin counties survey, were grouped together (n=31). Throughout the subsequent sections these are termed mobility manager responses. The Wisconsin counties survey participants who answered that they were not mobility managers (n=18) were analyzed separately. Throughout subsequent sections these will be termed county responses. Grouping these separately allowed us to gain an understanding of how mobility managers and other participants respond differently to questions. The categories for other states and national organizations include definitions, structure, funding, barriers and best practices. In order to analyze the information that was compiled, a list of policy goals was drawn up. Once these goals were clearly defined, WisDOT analyzed the existing conditions versus the policy goals to derive recommendations for further action in Wisconsin.

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<sup>18</sup> The Wisconsin counties survey was sent to 70 not 72 recipients due to overlap with the Wisconsin mobility managers survey recipient list

## Mobility Management in Wisconsin: Findings and Analysis

### Services

- Conduct needs assessment
- Coordinate funding
- Coordinate services or programs
- Develop inventory of available services
- Develop strategies to meet customer needs
- Identify customer needs
- Promote collaboration
- Train volunteers
- Transportation marketing
- Travel training
- Trip planning

This list as well as “other” and “none” categories were provided through the online surveys to determine which services mobility managers and county participants provide. Write-ins for the mobility manager “other” category included technical assistance, one-stop call centers and regional meetings. A write-in for the county “other” category was nutrition.

Wisconsin mobility manager responses show that the top service is to coordinate services or programs (Fig. 2).

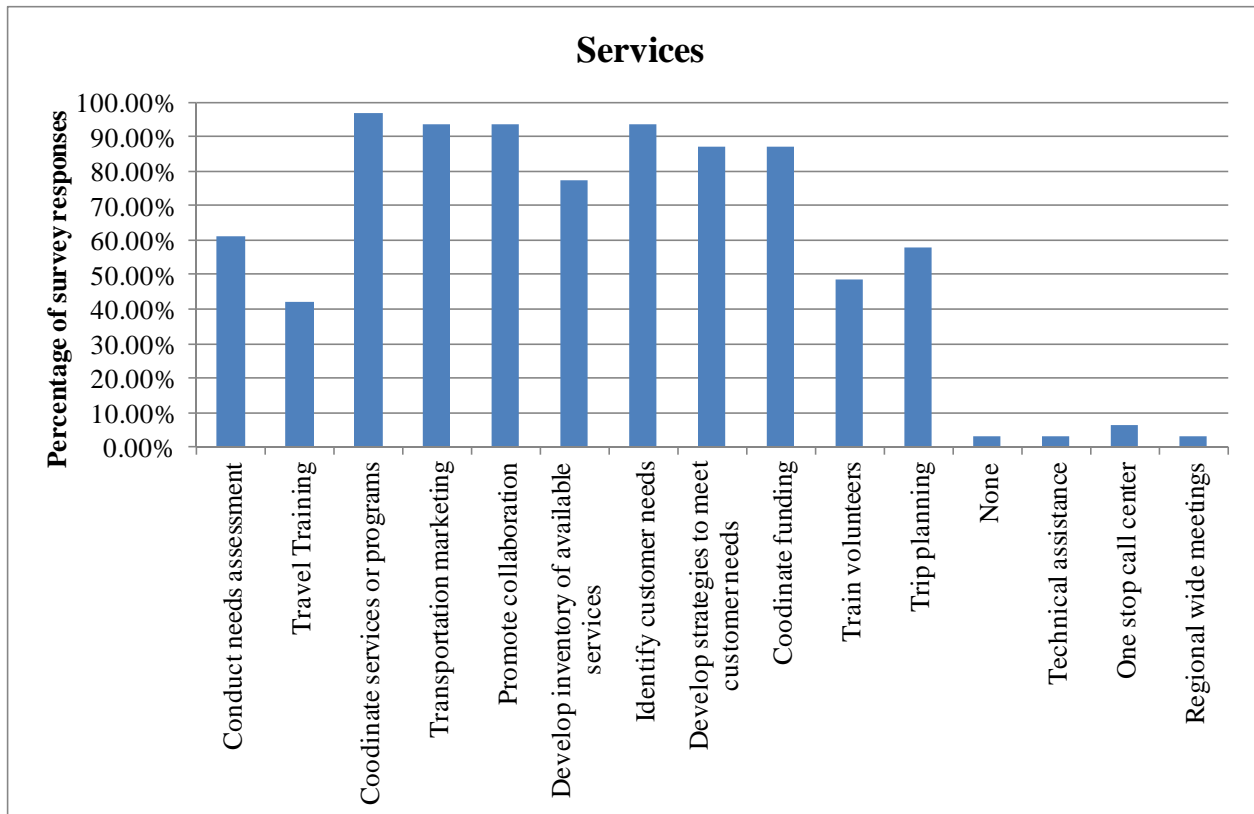


Figure 2. Wisconsin Mobility Manager Services Responses

Wisconsin county responses show identifying customer needs as the top service (Fig. 3).

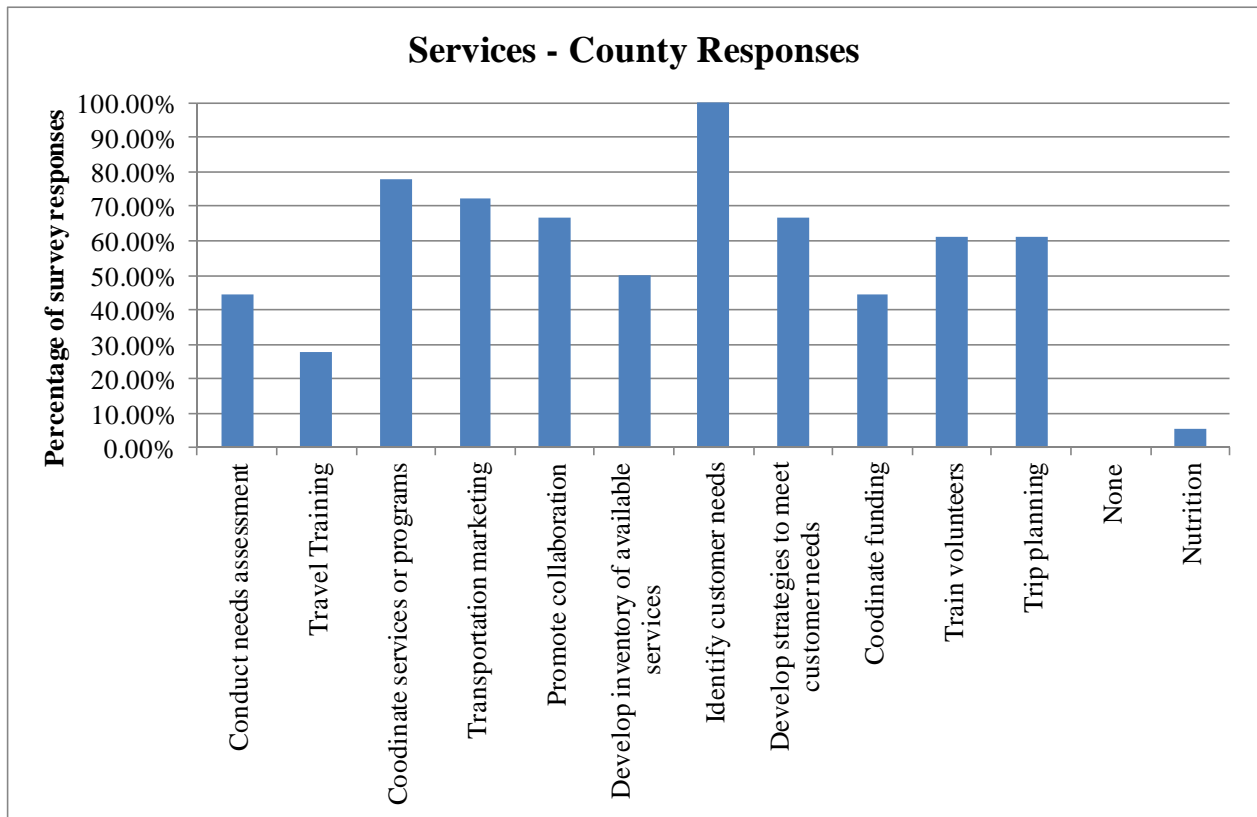


Figure 3. Wisconsin County Mobility Management Services Responses

Analyzing the results of these surveys show that non-mobility managers in counties are providing similar services as mobility managers, but mobility managers have a higher percentage of responses over a wider range of services.

Phone interviews provided specific examples for a number of these services. These examples only encompass some of the services that each of these organizations provides.

The Milwaukee County Transit System (MCTS) is providing a number of travel training services including:

- disability sensitivity training for fixed-route operators,
- working with people who may have a new mobility device on how to get that device secured on a bus and allowing the individual to practice while the bus isn't in service,
- speaking with school-aged children, seniors and other individuals about how to ride fixed-route transit and what transit can offer and
- providing one-on-one travel training

MCTS also works to develop strategies to meet customer needs, as demonstrated by its barrier removal project. This project renovates bus stops to make them accessible for all individuals and provides bus shelters and benches.<sup>19</sup>

Lutheran Social Services of Wisconsin and Upper Michigan (LSS) provides travel training and a bus buddies program for seniors. With this program, volunteers can assist individuals who may need more long-term training on how to ride the bus. LSS also operates the Making the Ride Happen transportation call center, which last year tracked 3,000 calls. This call center is staffed by transportation coordinators who assist seniors and individuals with disabilities to determine the best type of transportation program and services for their needs.<sup>20</sup>

The Northeastern Wisconsin Community Action Program (NEWCAP) works to develop strategies to meet the needs of its customers, including many rural individuals. NEWCAP would like to develop a car repair garage for lower income individuals in rural areas. Since mass transit isn't always a viable option, it is important for individuals to be able to keep a car for transportation. NEWCAP also operates a one-stop call center to assist individuals with their transportation needs.<sup>21</sup>

One of the services that Door-Tran, the transportation consortium in Door County, provides is to assist people with finding transportation options that best fit their needs. In order to provide the best option, it makes sure to ask potential riders key questions, such as if they are on Medicare. It will also review all transportation options that are available, such as public transit, volunteers and taxis, and analyze the options depending on if the customer needs affordability, accessibility, etc.<sup>22</sup>

While the Greater Wisconsin Agency on Aging Resources (GWAAR) doesn't directly provide transportation services, it fills an important role in providing technical assistance and training for those that do. GWAAR provides resources, materials and general information about transportation options.<sup>23</sup>

The East Central Wisconsin Regional Planning Commission is currently working on a regional mobility management report, specifically focusing on the three counties of Waupaca, Waushara and Shawano. This report will identify gaps, barriers and needs in order to come up with solutions. The report is hoping to include a map for all three counties, showing where people are being transported to and from, in order to help identify duplications in services and gaps.<sup>24</sup>

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<sup>19</sup> Don Natzke, Telephone Interview, May 26, 2015.

<sup>20</sup> Holly Keenan, Telephone Interview, May 12, 2015.

<sup>21</sup> Peggy Zielinski, Telephone Interview, May 11, 2015.

<sup>22</sup> Pam Busch, Telephone Interview, May 11, 2015.

<sup>23</sup> Carrie Porter, Telephone Interview, May 11, 2015.

<sup>24</sup> Nick Musson, Telephone Interview, May 12, 2015.

### Service Coverage Area

The Wisconsin mobility manager and county responses are aggregated in order to fully identify where the gaps in service exist (Figs. 4-7). The services are grouped into the categories of coordination and collaboration, training, research and development, and transportation marketing.

### *Coordination/Collaboration*

This category includes coordinating services or programs, promoting collaboration, coordinating funding, trip planning, one-stop call centers and regional meetings.

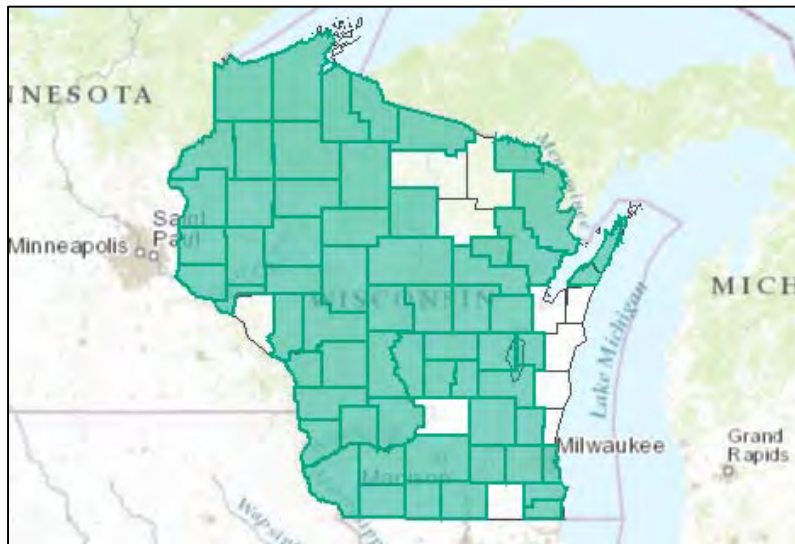


Figure 4. Wisconsin Coverage of Mobility Management Coordination/ Collaboration Services

### *Training*

This category includes travel training, training volunteers and providing technical assistance.

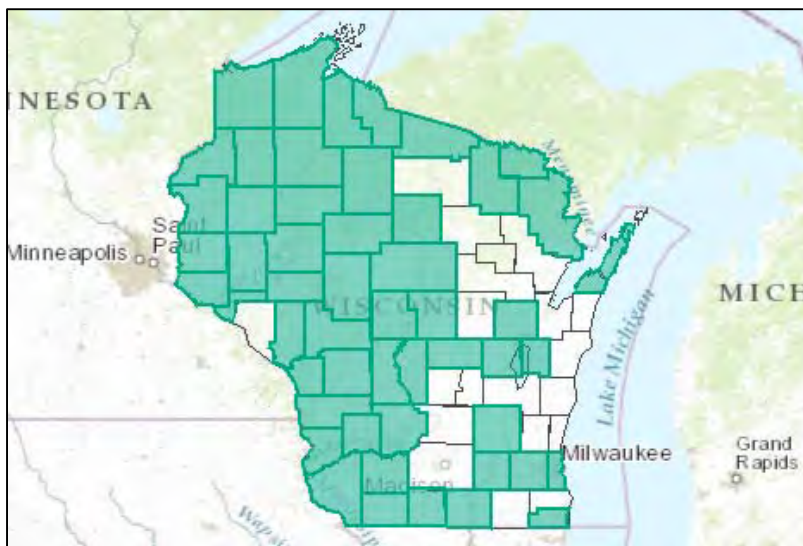


Figure 5. Wisconsin Coverage of Mobility Management Training Services



*Research and Development*

This category includes conducting needs assessments, developing inventories of available services, identifying customer needs and developing strategies to meet customer needs.

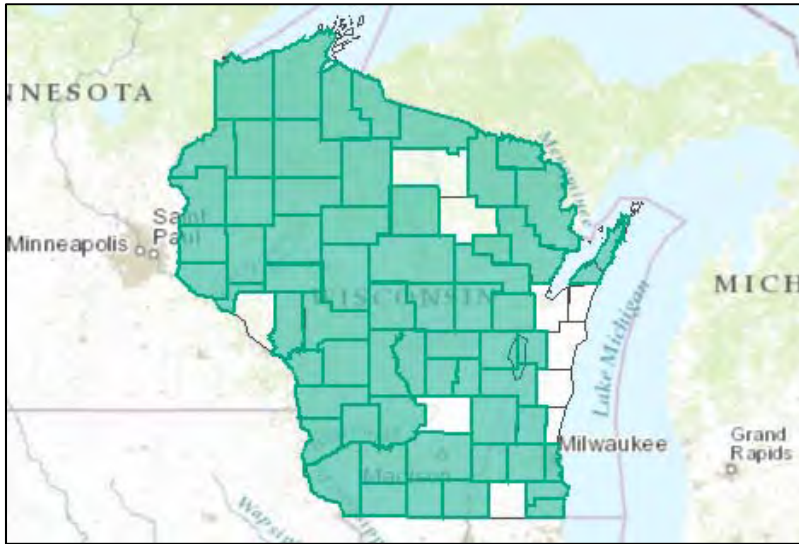


Figure 6. Wisconsin Coverage of Mobility Management Research and Development Services

*Transportation Marketing*

Transportation marketing is a standalone category.

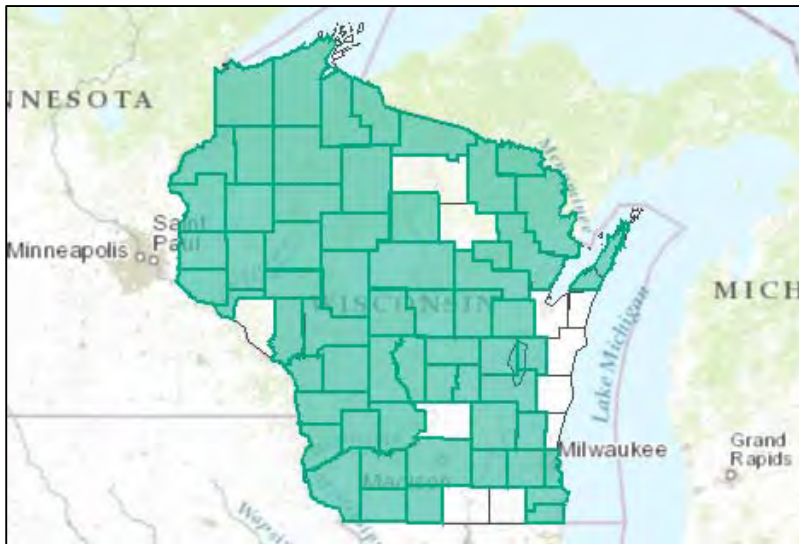


Figure 7. Wisconsin Coverage of Mobility Management Transportation Marketing Services

These maps show that there is fairly comprehensive coverage of service types in many areas of Wisconsin. Service gaps are shown to be primarily in eastern and north central Wisconsin counties with training services being the least comprehensive.

## Mobility Management Organizations and Titles

Mobility managers and those who provide mobility management services are housed in a variety of organizations and can have a variety of titles.

### *Organizations*

Organizations that provide mobility management services include community action programs, transportation providers or agencies, ADRCs/aging units, community disability and senior services and organizations, social and human service organizations or agencies, regional planning commissions, independent living centers and the VA.<sup>25</sup>

### *Titles*

In addition to those who are termed mobility managers, mobility management tasks are completed by a variety of individuals. Titles of these individuals include transit managers, transportation coordinators, resource specialists, administrative/clerical/transportation assistants, senior or disability benefit specialists, ADRC/Office on Aging supervisors or directors, and program coordinators.<sup>26</sup>

## Partnerships

Partnerships are essential for successful mobility management practices. Possible partnerships exist through non-profits, individuals or private companies and public agencies (Fig. 8). Wisconsin mobility manager responses indicate that for over 50 percent of survey participants existing partnerships are with non-profits and public agencies.

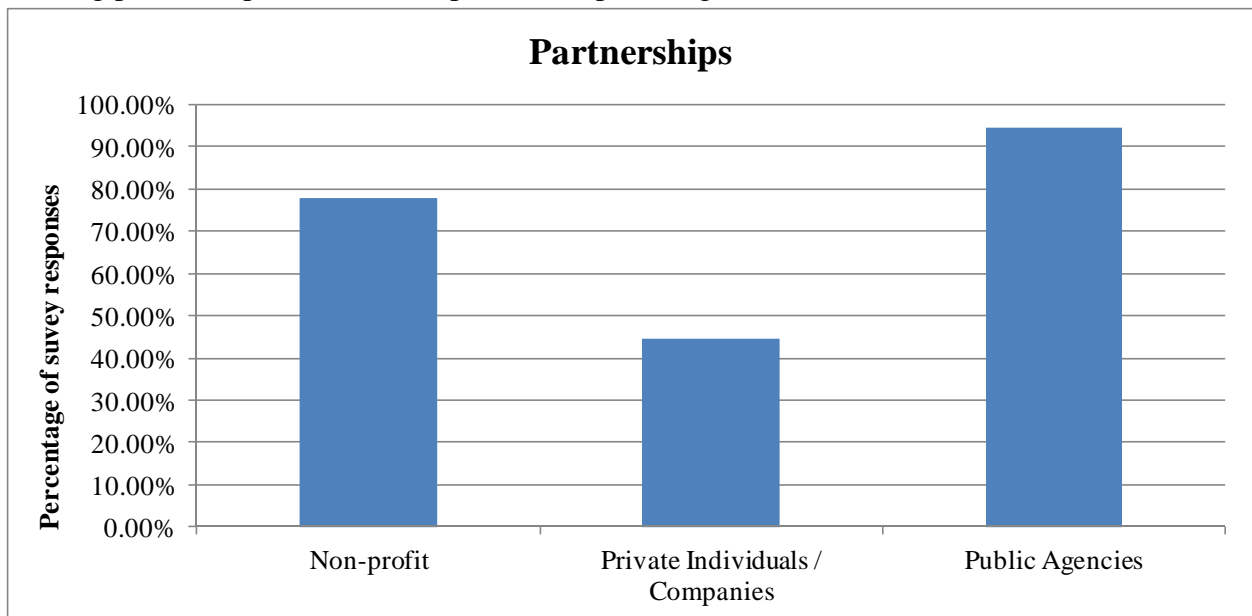


Figure 8. Wisconsin Mobility Manager Partnership Responses

<sup>25</sup> "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>26</sup> "Mobility Management Practices in Wisconsin Counties," online survey, May 8, 2015.

### *Non-profits*

Non-profit partners include, but are not limited to, senior, disability and low income service and advocacy organizations, and transportation organizations. Examples of disability service and advocacy organization partners include independent living centers, Goodwill, Curative Care, Easter Seals, Life Navigators and Disability Rights Wisconsin.<sup>27</sup> An example of a senior service and advocacy partner is the AARP. Low income service and advocacy partners include community action programs.<sup>28</sup> Transportation organization partners include Wisconsin Urban and Rural Transit Association (WURTA), the Wisconsin Bike Federation and non-profit taxis.<sup>29</sup>

### *Private*

Private partners include for-profit companies, such as Land's End,<sup>30</sup> as well as health care providers, such as hospitals.<sup>31</sup>

### *Public*

Public partners include governmental departments and divisions, schools and transit agencies. Governmental department and division partners include the Department of Health and Human Services, Department on Aging, County Commissions on Aging, ADRC, County Office for Persons with Disabilities, the VA, Department of Workforce Development, Division of Vocational Rehabilitation, Housing Authority, county governments and, in Milwaukee County, the Highway Division.<sup>32</sup> School partners include both schools and related organizations. For example, Stevens Point Transit works with Stevens Point area schools and MCTS works with Milwaukee Public Schools to coordinate transportation for area students.<sup>33</sup> In southwest Wisconsin, the Southwestern Wisconsin Community Action Program (SWCAP) provides mobility management services and partners with a Cooperative Educational Service Agency (CESA).<sup>34</sup> There are twelve CESAs in Wisconsin that assist schools in working together and could be partners in other geographic areas of Wisconsin as well. Public partnerships could also be obtained with local public transit agencies and shared-ride taxis.<sup>35</sup>

### *Partnership Combinations*

Combining partners from a variety of sectors can result in a more comprehensive mobility management network. NEWCAP has partnerships with county directors, county commissions on aging, senior services, transportation providers, University of Wisconsin Extension and independent living centers, among others. The partnership with UW Extension can provide

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<sup>27</sup> Don Natzke.; Tom Kenney, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>28</sup> Carrie Porter.; "Mobility Managers in Wisconsin."

<sup>29</sup> Carrie Porter.; Don Natzke.; Margaux Shields, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>30</sup> Ashley Nedeau-Owen, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>31</sup> "Mobility Managers in Wisconsin."

<sup>32</sup> Ibid.

<sup>33</sup> Susan Lemke, "Mobility Managers in Wisconsin," online survey, May 8, 2015.; Tom Kenney.

<sup>34</sup> Ashley Nedeau-Owen.

<sup>35</sup> "Mobility Managers in Wisconsin."

university resources and research across Wisconsin.<sup>36</sup> The LSS mobility management program benefits greatly by having public and private partnerships that include transit agencies and providers, community action programs, the Outagamie Housing Authority, counties and the ADRC. The partnership with the housing authority has led to the sharing of a vehicle and driver.<sup>37</sup> The MCTS mobility management projects have a variety of partnerships including social service providers, Milwaukee County Department on Aging, independent living center, Disability Rights Wisconsin, Milwaukee County Office for Persons with Disabilities, schools, VA, Family Care, Goodwill, Easter Seals, Milwaukee County Highway Division, Life Navigators and a WURTA group that deals with safety operations. An example of a successful outcome of one of these partnerships is the partnership with Disability Rights Wisconsin, an advocacy group, which led to an area mall providing better bus stop locations.<sup>38</sup> Interfaith Senior Program partners with a Transportation Affinity Group that includes Waukesha County ADRC, Waukesha Metro Transit, a Waukesha County Community Development Block Grant (CDBG) representative, six local non-profit taxis serving seniors and individuals with disabilities, the South East Regional Planning Commission (SEWRPC), local health care providers, an advocacy group and other health and human service agencies.<sup>39</sup>

**Funding**

Mobility management funding comes from a variety of sources (Fig. 9). The majority of funding is provided by federal and state sources with county, local, private grants, donations, fundraising, revenue and non-profit sources each comprising less than 20 percent of survey responses.

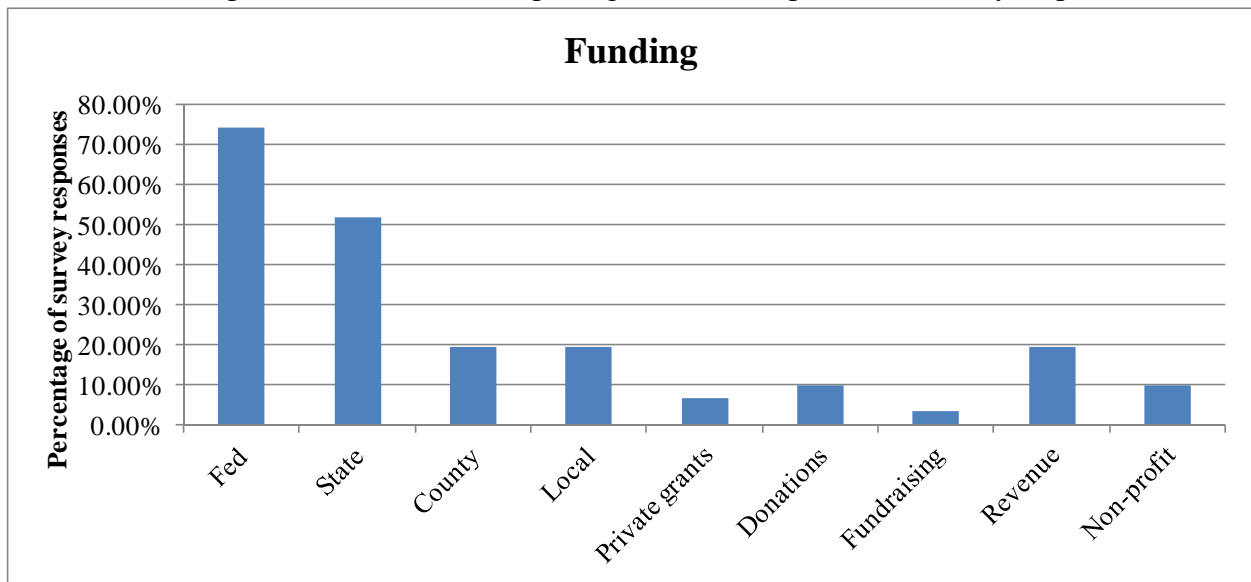


Figure 9. Wisconsin Mobility Manager Funding Responses

<sup>36</sup> Peggy Zielinski.

<sup>37</sup> Holly Keenan.

<sup>38</sup> Don Natzke.; Tom Kenney.

<sup>39</sup> Margaux Shields.

### *Federal*

The largest amount of mobility management federal funding is provided through the specialized transportation Section 5310 and New Freedom programs. Approximately 50 percent of mobility manager respondents who stated that they received federal funding received it through one of these two programs. The Section 5311 program and Older Americans Act funds received an equal number of mobility manager responses, each with approximately 20 percent. Other federal funding sources include Medicaid, the VA and Federal Highway Administration Metropolitan Planning Organization funds.<sup>40</sup>

### *State*

Mobility management funding through the state is primarily provided through s. 85.21 funds. Approximately 80 percent of mobility manager respondents who stated that they received state funding received it through this program. Other sources of state funding include s. 85.20 State Urban and Mass Transit Operating Assistance funds.<sup>41</sup>

### *County*

County mobility management funding is provided through state shared General Purpose Revenue (GPR) funds or through local county tax levy.<sup>42</sup>

### *Local*

Local mobility management funding is provided through local match funds, transit agencies or local partnerships.<sup>43</sup>

### *Revenue*

Mobility management funding is provided, in part, through revenue sources such as rider or participant contributions and user fees. For example, mobility management services at SWCAP are, in part, funded by revenue generated by LIFTRides, a separate transportation service at SWCAP.<sup>44</sup>

### *Non-profit Organizations*

Approximately 10 percent of mobility manager respondents received funding through non-profits. One of the non-profits mentioned is the United Way which is funded through a combination of contributions, membership support and other revenue sources.<sup>45</sup> The other non-

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<sup>40</sup> “Mobility Managers in Wisconsin.”; “Mobility Management Practices in Wisconsin Counties.”

<sup>41</sup> Ibid.

<sup>42</sup> Ibid.

<sup>43</sup> Ibid.

<sup>44</sup> Ashley Nedeau-Owen.

<sup>45</sup> Holly Keenan.; Margaux Shields.

profit mentioned is the Disabled American Veterans Charitable Service Trust which distributes the Rural Health Grant.<sup>46</sup>

### *Additional Funding Sources*

Additional funding sources for mobility management services include private grants, donations and fundraising.<sup>47</sup>

### Barriers

There are significant barriers to providing improved mobility management. These barriers include insufficient funding, lack of personnel resources, lack of coordination and collaboration, service and jurisdictional boundaries, demographics and information. Both mobility manager responses and county responses identified funding as the largest barrier to improved mobility management (Figs. 10 & 11).

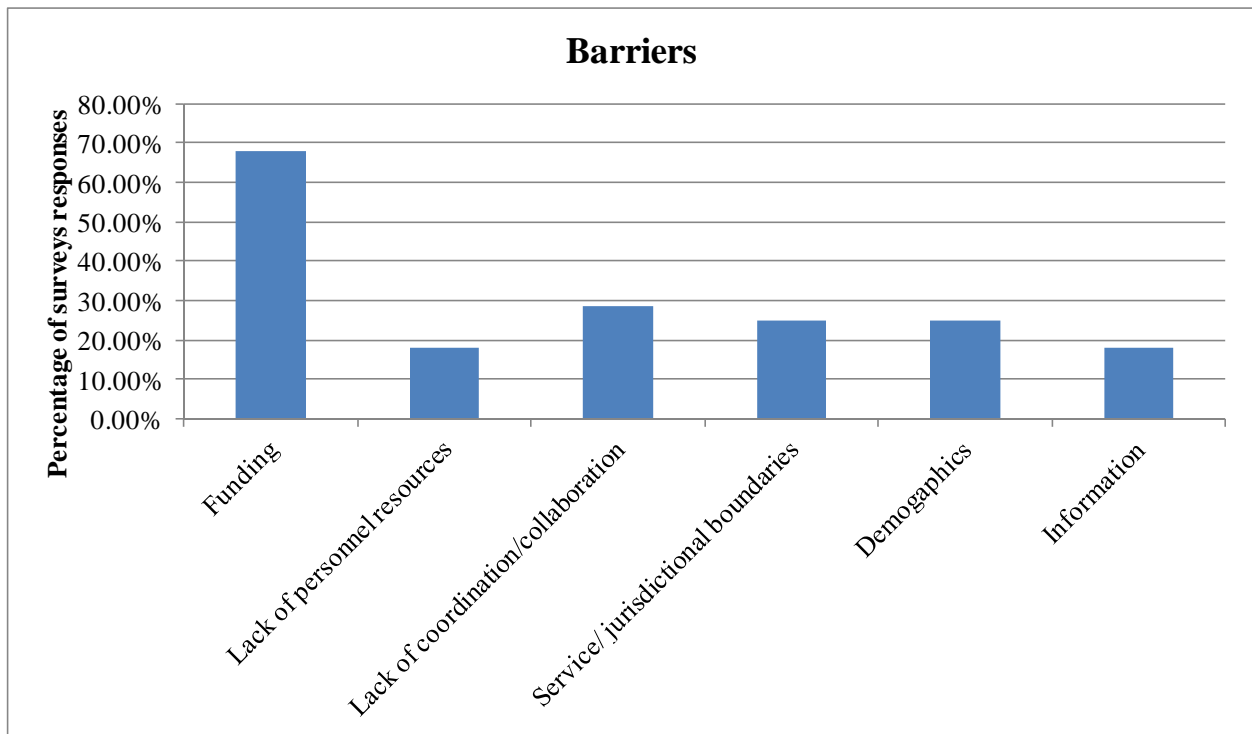


Figure 10. Wisconsin Mobility Manager Barrier Responses

<sup>46</sup> Terrence Dwyer, “Mobility Managers in Wisconsin,” online survey, May 8, 2015.

<sup>47</sup> “Mobility Managers in Wisconsin.”; “Mobility Management Practices in Wisconsin Counties.”

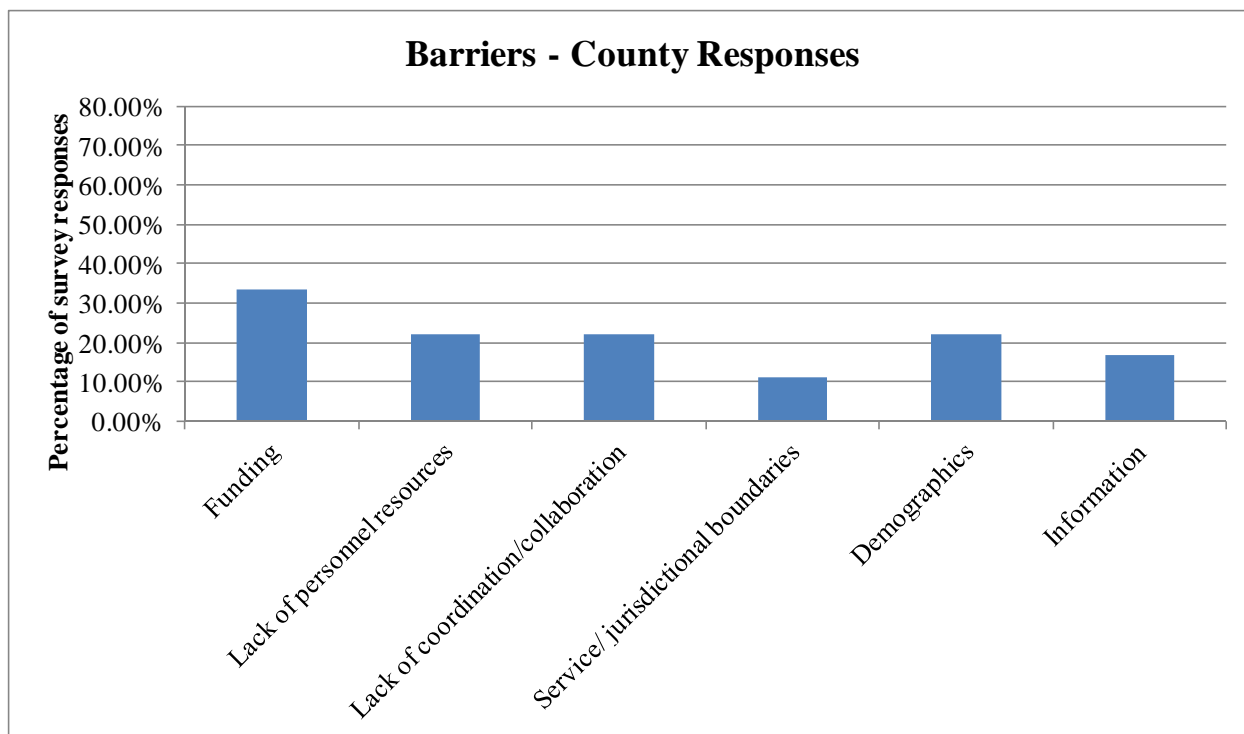


Figure 11. Wisconsin County Barrier Responses

Even though both mobility manager responses and county responses identified funding as the largest barrier, survey results show that a much greater percentage of mobility manager responses noted it as a barrier compared to county responses. For the county responses none of the barriers stand out that much above another. For the mobility manager responses, it is evident that funding is the largest barrier. Also worthy of note is that while service and jurisdictional boundaries received the least number of responses from counties, it was in the top three for mobility managers.

### *Funding*

Funding barriers to improved mobility management include overall lack of funding and lack of dedicated and reliable funding. The overall lack of funding makes it difficult to expand mobility management practices. In addition to not being able to expand mobility management practices, there is also a lack of funding for existing mobility managers to provide adequate outreach and marketing.<sup>48</sup> Outreach and marketing are important in making the transportation disadvantaged aware of the services that are available to them and for people to understand the importance of mobility management. Not having a dedicated and reliable source of funding makes it difficult to plan for the future of services and programs. Without dedicated funding, the money may be used for other services instead of transportation. For example, while Older Americans Act funds may

<sup>48</sup> Anonymous, "Mobility Management Practices in Wisconsin Counties," online survey, May 8, 2015.

be used for transportation, the Act doesn't require transportation as a service.<sup>49</sup> The lack of funding is also causing grants to become increasingly competitive and harder to obtain.<sup>50</sup>

### *Lack of Personnel Resources*

There is a general lack of mobility managers across the state and also a lack of people within an organization who are dedicated to transportation. With not enough staff time or funding dedicated to transportation, it can be difficult to improve or expand services.<sup>51</sup> In addition to lack of mobility managers, there is a lack of volunteer drivers. Volunteer drivers provide an essential service for those individuals who don't have the option of public transit, who are unable to drive or who don't have access to a car. In some areas of the state, it is not a general lack of volunteer drivers that is a barrier, but a lack of them year-round. Volunteer drivers may be retirees who travel south in the winter, leaving a seasonal service gap.<sup>52</sup>

### *Lack of Coordination/Collaboration*

There are a number of issues that contribute to a lack of coordination and collaboration, a significant barrier to improved mobility management. The increased competition for funding can make collaboration difficult. Organizations that could be partners are instead competing for funding which can create animosity.<sup>53</sup> There is also a lack of coordination between organizations on what the role of a mobility manager should be.<sup>54</sup> For example, there is a difference in mobility management rules for those who operate in a non-profit compared to those who work for counties.<sup>55</sup> This can create confusion for both mobility managers and customers. The siloed view of transportation is a large hurdle to creating better coordination and collaboration. Many transportation programs have different ride requirements and cannot or choose not to serve people outside their dedicated populations.<sup>56</sup> Certain transportation services may only be used for a specific population even when they are not at capacity. For example, specialized medical vehicle operators managed by MTM, the state of Wisconsin's non-emergency medication transportation (NEMT) manager, are only available to people on certain Medicaid programs.<sup>57</sup> The issue of insurance is a large hurdle to increased collaboration.<sup>58</sup> The assumption of insurance or risk liability contributes to organizations not wanting to transport people from other organizations since insurance won't cover them.<sup>59</sup> This contributes to inefficient transportation.

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<sup>49</sup> Carrie Porter.

<sup>50</sup> Ashley Nedeau-Owen.

<sup>51</sup> Carrie Porter.

<sup>52</sup> Peggy Zielinski.

<sup>53</sup> Ibid.

<sup>54</sup> Tonya Eichelt, "Mobility Management Practices in Wisconsin Counties," online survey, May 8, 2015.

<sup>55</sup> Holly Keenan.

<sup>56</sup> Stephanie Levenhagen, "Mobility Managers in Wisconsin," online survey, May 8, 2015.; Carrie Porter.

<sup>57</sup> Susan Torum, "Mobility Management Practices in Wisconsin Counties," online survey, May 8, 2015.

<sup>58</sup> Nick Musson.

<sup>59</sup> Carrie Porter.



It can also be difficult for organizations to work together since many are using different types of software to manage services. Using the same software can increase coordination and efficiency.<sup>60</sup>

### *Service/Jurisdictional Boundaries*

The inability to provide services across service area and jurisdictional boundaries is a significant barrier to creating a comprehensive mobility management network. Regional transportation networks are important because many people travel outside their service area or jurisdiction to access employment, medical, shopping or recreational opportunities. Many transportation services and mobility managers are restricted from working across county lines.<sup>61</sup> For individuals who are between two service areas, they may not get the benefit of having a mobility manager, even though there is one close by, because of boundary restrictions.<sup>62</sup>

### *Demographics*

Demographic barriers to improved mobility management include living in rural areas, the growing aging population, having a lower income and lacking accessibility. Rural areas present barriers due to low population, large service areas and distances needed to travel.<sup>63</sup> Quite a few of the mass transportation programs that are available are designed for more populated areas. In rural areas, keeping people independent and in their own cars is important.<sup>64</sup> Individuals with disabilities and working, able-bodied adults who don't have access to a car both lack options.<sup>65</sup> A greater variety of transportation options to serve all populations in both rural and urban areas is needed. The growing aging population will increase demand for transportation options. As communities age, it will be important to have dedicated mobility managers since there will be a greater need for services and volunteers.<sup>66</sup> The diversity of transportation needs for different demographics will need to be addressed through a diversity of options.

### *Information*

Lack of information about issues and service availability is a barrier to improved mobility management. If there isn't a mobility manager or someone to identify issues and pursue them, they may not get addressed.<sup>67</sup> Currently, there is a lack of understanding at the local level about what community needs are and an inability to identify the locations of unmet needs.<sup>68</sup> In addition to a lack of knowledge about issues, there is a lack of knowledge about what services are

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<sup>60</sup> Nick Musson.

<sup>61</sup> "Mobility Managers in Wisconsin."; "Mobility Management Practices in Wisconsin Counties."

<sup>62</sup> Tonya Eichel.

<sup>63</sup> "Mobility Managers in Wisconsin."; "Mobility Management Practices in Wisconsin Counties."

<sup>64</sup> Peggy Zielinski.

<sup>65</sup> Susan Torum.

<sup>66</sup> Carrie Porter.; Pam Busch.

<sup>67</sup> Carrie Porter.

<sup>68</sup> Dawn Tart, "Mobility Managers in Wisconsin," online survey, May 8, 2015.; Mike Glasgow, "Mobility Management Practices in Wisconsin Counties," online survey, May 8, 2015.

available. This barrier could be addressed through educating communities about what mobility management can do because many communities are unaware of the concept and its benefits.<sup>69</sup>

### Opportunities for Growth

The mobility manager survey responses provide an idea of specific opportunities for growth of mobility management. These areas of opportunity include coordination and collaboration, regional transportation, transit or transit facility enhancement, new and expanded projects or ideas, and volunteers.

#### *Coordination/Collaboration*

The Wisconsin ICTC is not currently active. Providing an active state – level coordination council could provide an opportunity for statewide growth of mobility management.<sup>70</sup> There could also be growth in mobility management if more funds were provided to share information and collaborate or if there were more unified requirements on program-specific funding between counties.<sup>71</sup> Tracking the various funding sources and services that are provided across organizations could lead to a stronger mobility management network. For example, funding for Medicaid-covered rides comes from the Department of Health and Human Services, while other rides are funded through other sources.<sup>72</sup> Knowing the different sources of funding that are available could lead to better coordination of funding options.

#### *Regional Transportation*

Additional funding and coordination could lead to an opportunity for improved mobility management on a regional level. Specific regional areas where there could be growth are the Highway 41 corridor between Green Bay and Oshkosh, intercity between Menomonie and Eau Claire and Menomonie to St. Croix County to Minnesota.<sup>73</sup> Improved regional mobility management would require an improvement in coordination and collaboration as well since, as mentioned previously, it can be difficult to cross service and jurisdictional boundaries.

#### *Transit/Transit Facility Enhancement*

Improving transit options and transit facilities could provide an opportunity for improved mobility management by creating greater options for seniors, individuals with disabilities and low-income individuals. Transit facility enhancement could include the growth of the barrier removal projects that are implemented by MCTS. These projects work to identify transit stop accessibility issues in the public right of way and add in benches and shelters to enhance conditions.<sup>74</sup> Improving accessibility and transit facility conditions makes transit a more viable

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<sup>69</sup> Holly Keenan.

<sup>70</sup> Carrie Porter.

<sup>71</sup> Pamela Kernan, “Mobility Managers in Wisconsin,” online survey, May 8, 2015.; Dawn Tart.

<sup>72</sup> Dawn Tart.

<sup>73</sup> Holly Keenan.; Denise Larson.

<sup>74</sup> Don Natzke.; Tom Kenney.

option for seniors and individuals with disabilities. Expanding transit services could include more demand response services for social trips.<sup>75</sup> Currently, there are fewer options available for individuals who wish to travel for social rather than medical reasons. Medical transportation though is an area that will need continued growth as well. With the growing aging population the demand for transportation options will increase.<sup>76</sup> Individuals may also need to travel long distance to get to medical care. Therefore an increase in long-distance options will also be needed.<sup>77</sup>

#### *New or Expanded Projects or Ideas*

Educating communities about what mobility managers can do could yield an expanded mobility management network. The more people learn about mobility managers, the more they may want one in their area.<sup>78</sup> Sometimes people have a tendency to stick to what they know and do things how they have always been done, but mobility managers can assist with new ideas and solutions to transportation issues.<sup>79</sup> As mentioned in the barriers section, there is difficulty in providing transportation options in rural areas because mass transit isn't always available due to low population density and long distances. The growth of mobility management could help in deriving solutions for these areas.<sup>80</sup> Also, taking a proactive approach to developing programs and ideas before the service is actually needed can help ensure that individuals' needs are being met.<sup>81</sup>

#### *Volunteers*

Volunteers are an important part of a comprehensive transportation network. Increased funding for volunteer driver programs could lead to an increase in service coverage, especially for those areas not served by mass transit. In addition, implementing volunteer driver mileage reimbursement programs could assist in attracting more volunteers.<sup>82</sup> One impediment to volunteer driver recruitment is that mileage reimbursement requires use of the federal 1099 tax form, and not all volunteers may want to work with those.<sup>83</sup>

Mobility management in Wisconsin includes a variety of services that are provided throughout many areas of the state by a variety of organizations and individuals. There are a number of barriers to improved mobility management, but also opportunities. An analysis of mobility management in other states can show the similarities and differences to Wisconsin and help inform recommendations for further action.

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<sup>75</sup> Ashley Nedeau-Owen.

<sup>76</sup> Nick Musson.

<sup>77</sup> Peggy Zielinski.

<sup>78</sup> Carrie Porter.

<sup>79</sup> Jeff Segebrecht, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>80</sup> Peggy Zielinski.

<sup>81</sup> Susan Lemke.

<sup>82</sup> Karen Melasecca, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>83</sup> Pam Busch.

## **Mobility Management in Other States**

To gain an understanding of mobility management practices in other states and national organizations, surveys were conducted of Florida, Iowa, Minnesota and Ohio, as well as the NCMM Regional Liaison for FTA Regions One and Five (New England and the Midwest, respectively). Information was gathered in the following categories: definitions, structure, funding and barriers.

### Titles and Definitions

Mobility manager definitions and titles of individuals who engage in mobility management services vary by state.

#### *Titles*

Individuals in other states who engage in mobility management services have a variety of titles in addition to mobility manager. Titles include mobility coordinators, transportation coordinators, health transportation coordinators and operations managers.<sup>84</sup> Competencies are more important than titles.<sup>85</sup>

#### *Definitions*

Mobility manager definitions can be broad or more focused. Florida doesn't have a written definition for mobility management.<sup>86</sup> It does have a working definition: an innovative approach to managing and delivering coordinated transportation services to customers.<sup>87</sup> The main focus is on coordination and meeting individual needs. Florida has been doing a lot with coordination over the years and is continually working on how to improve meeting customer needs.<sup>88</sup>

In Iowa, both definition and job descriptions are broad. A mobility coordinator's main role is to connect with the community and form an identity representative of community needs. Some focus on travel training, some meet with the community and form new projects or ideas, and some focus on networking and marketing. Primary service goals include coordinating services or programs, promoting collaboration between areas and services and developing inventories of available services.<sup>89</sup>

Minnesota will be rolling out a new directive soon that will provide new definitions. Minnesota found that the definitions of mobility managers were clear early on, but have become broad over the years. In order to target specific activities and encourage those activities, it found that it would be helpful to have a less broad and more consistent definition. The new definition focuses

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<sup>84</sup> Judy Shanley, Telephone Interview, May 29, 2015.; Jeremy Johnson-Miller, Telephone Interview, June 2, 2015.

<sup>85</sup> Judy Shanley.

<sup>86</sup> Ed Coven, Email Correspondence, June 16, 2015.

<sup>87</sup> Steve Holmes, Telephone Interview, June 24, 2015.

<sup>88</sup> Ibid.

<sup>89</sup> Jeremy Johnson-Miller.

on mobility management at a higher level. Mobility management will not arrange individual transportation, but will build systems and networks and develop relationships. There will be transportation solution specialists, separate from mobility managers, who will work directly with individuals. The primary focus for mobility management will be on coordinating services or programs and promoting collaboration between areas and services.<sup>90</sup>

In Ohio the Department of Transportation (ODOT) provides a very clear definition of mobility management. It uses the NCMM definition:

Mobility management is an approach to designing and delivering transportation services that starts and ends with the customer. It begins with a community vision in which the entire transportation network-public transit, private operators, cycling and walking, volunteer drivers, and others-works together with customers, planners, and stakeholders to deliver the transportation options that best meet the community's needs.<sup>91</sup>

In addition to providing a clear definition ODOT also provides a list of expected, but not required tasks for mobility management projects that receive funding. The number of tasks completed and the quality of work may be taken into account in the scoring of future funding applications.<sup>92</sup> These tasks include:

- providing technical assistance with locally developed, coordinated public transit human services transportation plans,
- holding coordination council meetings,
- implementing new mobility management practices,
- creating and keeping up to date a website for projects that also serves as a place for local/regional transportation information,
- taking responsibility for developing solutions to transportation problems in the community,
- attending at least one mobility management related conference,
- participating in mobility management related meetings and
- meeting one-on-one with riders, major employers, economic development groups, local business associations, human service agencies, local governments and other funders.<sup>93</sup>

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<sup>90</sup> Noel Shughart, Telephone Interview, June 11, 2015.

<sup>91</sup> "Mobility Management," *National Center for Mobility Management*, accessed June 2015, <http://nationalcenterformobilitymanagement.org/mobility-management/>.

<sup>92</sup> David Walker, Telephone Interview, June 15, 2015.

<sup>93</sup> "Program information and application instructions for Ohio Coordination Program, JARC and New Freedom," *ODOT*, obtained by email from David Walker, June 16, 2015.

## Structure

The organizational and program structure of mobility management is dependent on the state.<sup>94</sup> In some states there are commissions or councils that provide some of the same functions as mobility management programs, but are not termed as such. In each state these programs have a varied relationship with state Departments of Transportation (DOTs) and combination of partnerships.

The mobility management program in Iowa began when the state wanted to increase coordination of statewide transit systems and a United We Ride ambassador recommended mobility coordinators. The Iowa Department of Transportation (DOT), recognizing that it could get JARC and New Freedom funding for those positions, started with one statewide coordinator and then expanded. Currently, there are six mobility coordinators who cover specific regions and one statewide coordinator who covers all other regions. Even though the whole state is covered by a coordinator, the coverage of mobility management is not as expansive as Iowa DOT hoped. Mobility management is structured through the regional transit agencies, and the statewide coordinator is responsible for 12 of the 16 regions.<sup>95</sup>

In Minnesota, mobility management is an eligible activity under Section 5310. Organizations can choose to take on mobility management services and currently only portions of the state have chosen to do so.<sup>96</sup> The Minnesota Council on Transportation Access (MCOTA) provides some of the same coordination activities as mobility management programs. It combines 13 agencies and organizations to work on improving coordination, accessibility and efficiency of transportation for all individuals in Minnesota.<sup>97</sup>

The Ohio Coordination Program, operated by ODOT, supports mobility management activities which are eligible for funding under Section 5310, JARC and New Freedom. This program has changed over the years. In the past it was completely state funded and counties could apply to have a coordinator for a three year time limit. When the state funding for the program was discontinued, the decision was made that the name of the program would stay the same, but only capital, not operating expenses, would be provided. While the program name stayed the same, the term for the individuals who were funded changed from coordinators to mobility managers.<sup>98</sup> ODOT provides specific guidelines for mobility management projects that are eligible for funding. Projects can have a regional or local focus and there must be one full-time mobility manager for each mobility management project that is funded. If the mobility management

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<sup>94</sup> Judy Shanley.

<sup>95</sup> Jeremy Johnson-Miller.

<sup>96</sup> Noel Shughart.

<sup>97</sup> "Minnesota Council on Transportation Access," *CoordinateMNTransit.org*, accessed June 2015, <http://www.coordinatemntransit.org/MCOTA/index.html>.

<sup>98</sup> David Walker.

project applicant provides transportation services, the mobility management project must be clearly separated from transportation operations.<sup>99</sup>

Florida doesn't have a formal program termed mobility management but does have programs that conduct mobility management services. The Commuter Assistance Program operated by the Florida Department of Transportation (FDOT) Transit Office provides funding for programs that handle ridesharing and Transportation Management Association or Organization activities.<sup>100</sup> The Florida Commission for the Transportation Disadvantaged (CTD) coordinates transportation services for disadvantaged individuals in all 67 counties.<sup>101</sup> The CTD is responsible for the provision of coordinated transportation services but doesn't directly provide services. For each county, there are community transportation coordinators who directly work with communities and individuals. For some of the more rural counties, it doesn't make sense to have one coordinator per county because of the lack of population, so some counties are combined under one coordinator. Models of community transportation coordination around the state vary. They include full brokerage systems in which the coordinator doesn't provide actual transportation services but coordinates them, partial brokerages in which it provides some services, and full service providers. The CTD decides where community transportation coordinators will be located; they can be housed at transportation authorities, non-profits and for-profits. The community transportation coordinators also work on combining funds, such as CTD and other state funds, to provide services. In order to hold community transportation coordinators accountable, there are local coordinating boards. These boards are made up of a variety of staff similar to the CTD and are funded by the CTD. In addition to overseeing the community transportation coordinators, they also establish priorities, such as medical or employment trips, and develop the transportation disadvantaged service plan at the county level, based on community input. This plan is their version of the locally-developed, coordinated public transit-human services transportation plan.<sup>102</sup>

#### *Relationship with state Departments of Transportation*

Mobility management or coordination programs have different levels of involvement with state DOTs. The Iowa DOT manages the Iowa mobility management program and contracts with individual regions for mobility coordinators. It created broad job descriptions, but doesn't strictly govern how positions develop.<sup>103</sup> In Minnesota, programs have some connection with Minnesota Department of Transportation (MnDOT). MnDOT provides funding for mobility management programs and technical assistance to encourage mobility management. ODOT involvement in mobility management projects is similar to MnDOT in that mobility management projects are

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<sup>99</sup> "Program information and application instructions for Ohio Coordination Program, JARC and New Freedom," ODOT.

<sup>100</sup> Ed Coven.

<sup>101</sup> Ibid.

<sup>102</sup> Steve Holmes.

<sup>103</sup> Jeremy Johnson-Miller.

sub-recipients of federal funding through ODOT. The Florida CTD is an independent body housed within FDOT for administrative purposes, but reports to its own Governor appointed board instead of the FDOT Secretary. There are FDOT staff members on the board.<sup>104</sup>

### *Partnerships*

Partnership categories for other states are fairly similar to Wisconsin. Typical partners include transit agencies, non-profits such as community action programs and governmental agencies such as Departments of Health, Human Services and Aging.<sup>105</sup>

### Funding

Funding sources for mobility management and coordination programs in other states include federal, state and local. As in Wisconsin, mobility management program funding in Minnesota comes from the state's Section 5310 program.<sup>106</sup> Iowa is still using remaining JARC and New Freedom funds, but those will be running out, and another source of funding will need to be found. The state is hoping to transition from grant funded positions to locally funded positions.<sup>107</sup> Ohio doesn't provide any state funding for mobility management programs. The state is using primarily Section 5310 funding as well as some remaining JARC and New Freedom funding. The 20 percent local share that is required as a match to federal funding can come from a variety of sources.<sup>108</sup> In Florida, community transportation coordinators combine federal, state and local funding sources.<sup>109</sup> The Florida CTD is funded through the Transportation Disadvantaged Trust Fund which is primarily made up of license tag fees and transfers from the State Transportation Trust Fund, which primarily comes from gas taxes.<sup>110</sup>

### Barriers

Barriers for improved mobility management in other states and nationally exist in the categories of funding, lack of coordination and collaboration, information and the structure of mobility management.

### *Funding*

Funding is a main barrier to improved mobility management in all states. In Iowa, the mobility management program relies on JARC and New Freedom funds, but since those programs have been discontinued, they will need a new funding source. The numbers of mobility coordinators are already dropping due to funding issues; two years ago the state had about ten coordinators, and currently it has six. The state has found it difficult to encourage transit systems to use operating funds for mobility management. Nevertheless, it continues to encourage coordinators

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<sup>104</sup> Ed Coven.

<sup>105</sup> Other State and National Telephone Interviews.

<sup>106</sup> Noel Shughart.

<sup>107</sup> Jeremy Johnson-Miller.

<sup>108</sup> David Walker.

<sup>109</sup> Steve Holmes.

<sup>110</sup> Ed Coven.



to make partnerships and connections with the hope that people will see the benefit and provide funding.<sup>111</sup> Ohio is facing a similar issue since it also is using some JARC and New Freedom funds. While mobility management programs are eligible for Section 5310 funding, using those funds for mobility management could mean fewer vehicles are eligible for funding.<sup>112</sup> Funding and staff resources are also barriers for mobility management in Minnesota.<sup>113</sup>

#### *Lack of Coordination/Collaboration*

Lack of coordination and collaboration are barriers to improved mobility management. It is important to have collaboration between state agencies because some state agency policies could hinder coordination and information sharing.<sup>114</sup> Coordination is important, not only within a state, but also on a national level. There are many states that don't have a mobility manager network making it difficult to learn best practices.<sup>115</sup> Coordination can be difficult because organizations may have the mindset that to coordinate they would need to contribute funds that could otherwise be used on their own programs. Therefore, they could see it as losing more than they gain.<sup>116</sup> In actuality, coordination can save resources leading to increased efficiency.

#### *Information*

The lack of information about what mobility management is and the services it provides is a barrier for other states as well as Wisconsin. There are some state DOTs that are unfamiliar with the concept of mobility management. There needs to be better ways to communicate and educate people so that more states are aware of the concept and benefits.<sup>117</sup> The lack of education for existing mobility managers is a barrier in Ohio. The mobility managers have varying levels of experience and knowledge, and it can be difficult for programs to find someone right away who is qualified.<sup>118</sup> The lack of information distributed to rural areas in Iowa is a barrier for improved mobility management. There are transportation options for all passengers in rural areas, but it is difficult to make rural areas aware of them and to encourage individuals to use them.<sup>119</sup>

#### *Structure*

The structure of mobility management can be a barrier to improving it. Currently mobility management is not viewed as a professional field by some in the transportation industry, due in part to the lack of formal structure and broad definitions. Developing core competencies on a national level for mobility managers could assist in making the field viewed as more

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<sup>111</sup> Jeremy Johnson-Miller.

<sup>112</sup> David Walker.

<sup>113</sup> Noel Shughart.

<sup>114</sup> David Walker.

<sup>115</sup> Jeremy Johnson-Miller.

<sup>116</sup> Judy Shanley.

<sup>117</sup> Ibid.

<sup>118</sup> David Walker.

<sup>119</sup> Jeremy Johnson-Miller.

professional.<sup>120</sup> In the structure of some mobility management programs, the mobility managers themselves are not decision makers. While these mobility managers can encourage practices, they can't always control the direction of programs or have any real power for change. Having a mobility manager on staff is not the same as having a mobility manager that is backed by a policy board.<sup>121</sup> In Florida the structure of the Statewide Medicaid Managed Care program has changed and the CTD will be providing non-emergency medical transportation services to some Medicaid recipients. This change has caused a need for a different mix of vehicle types, including a larger number of smaller vehicles.<sup>122</sup>

## **Best Practices**

Best practices were obtained from Wisconsin mobility manager responses and information about mobility management practices in other states and nationally.

### Wisconsin

Throughout Wisconsin there are a number of examples of successful mobility management strategies. These successful strategies exist in the categories of programs and organizations, volunteers, coordination and collaboration, technology, marketing and training and education.

#### *Programs/Organizations*

WAMM is an excellent source for information. Its website ([www.wi-mm.org](http://www.wi-mm.org)) provides information about membership, resources, advocacy, certification, events and board members. It also hosts meetings and telephone conferences that promote mobility manager networking.<sup>123</sup> These meetings and conferences provide opportunities to learn about what is going on around the state and discuss strategies with other individuals who may be facing similar issues. In addition to providing information and hosting meetings, it also trains and certifies mobility managers in the state.

When looking at other programs around the state, NEWCAP's Medical Mileage Reimbursement Program for Marinette and Oconto counties has shown to be successful.<sup>124</sup> This program is for seniors and/or individuals with disabilities who are unable to use other transportation services to get to their medical appointments. These individuals may use any driver of their choice, and the driver is reimbursed at a specific rate for their mileage. Other successful programs around the state include volunteer driver, vehicle loan and gas voucher programs.<sup>125</sup> These programs are especially successful in rural areas of the state where mass transit is not an option.

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<sup>120</sup> Judy Shanley.

<sup>121</sup> Noel Shughart.

<sup>122</sup> Steve Holmes.

<sup>123</sup> Don Natzke.

<sup>124</sup> Peggy Zielinski.

<sup>125</sup> Nick Musson.

### *Volunteers*

Volunteers are an important asset in mobility management. There are a number of volunteer driver programs in the state that, in some cases, may be an individual's only option for access outside of their residence. In the Fox Valley area, there are a large number of volunteer drivers that help fill gaps in service because they are able to cross jurisdictional boundaries.<sup>126</sup> Volunteer drivers can provide more than just a service, they can also provide well checks and social interaction.<sup>127</sup> There are many volunteers who are doing good work in providing care to those they transport.<sup>128</sup>

### *Coordination/Collaboration*

Mobility managers serve an important function in collaborating with groups and individuals and coordinating services. This direct collaboration with communities provides the flexibility to create and operate programs that are dictated by local community needs and services.<sup>129</sup> Prior to the introduction of mobility management practices, individuals and organizations had to try to solve issues on their own. Now mobility managers can act as problem solvers for the area.<sup>130</sup> Mobility managers can assist in creating successful collaborations between programs. For example LSS operates a volunteer driver program that partners with the Retired Services Volunteer Program (RSVP). RSVP does the volunteer recruitment and background checks, assisting the volunteer driver program in saving staff time and money.<sup>131</sup> Collaboration between mobility managers is also important and can lead to increased coordination. On a national level, the VA is working to put in place local mobility managers, but they are not generally connected to other mobility managers in the area. The more that mobility managers know about each other, the better the connections are.<sup>132</sup> This leads to increased coordination and a stronger mobility management network.

Effective communication is essential for successful coordination and collaboration. In Door County, the Door-Tran transportation consortium has over 40 members. They maintain communication with all partners and provide monthly e-newsletters to keep everyone up to date.<sup>133</sup> Communication to clients and possible partners is also important for successful mobility management. Stevens Point Transit's travel trainer works on communicating services to local organizations and schools.<sup>134</sup> This can strengthen existing partnerships and create more opportunities for collaboration. As discussed in a previous section, the lack of knowledge about

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<sup>126</sup> Holly Keenan.

<sup>127</sup> Anonymous, "Mobility Managers in Wisconsin," online survey, May 8, 2015.

<sup>128</sup> Anonymous, "Mobility Managers in Wisconsin," online survey, May 8, 2015.; Ashley Nedeau-Owen.

<sup>129</sup> Carrie Porter.

<sup>130</sup> Ibid.

<sup>131</sup> Holly Keenan.

<sup>132</sup> Carrie Porter.

<sup>133</sup> Pam Busch.

<sup>134</sup> Susan Lemke.

mobility management is a barrier. Clear and proactive communication can assist in overcoming this.

### *Technology*

Technology can be a very important asset in mobility management. Dodge County uses a trip dispatch and scheduling system, which contains everything staff need to setup rides and also provides drivers with detailed manifests.<sup>135</sup> Websites can also be useful technology tools to provide information and services to individuals. Websites may be the first point of contact for people, and it is important that they are user friendly. SWCAPs website generates a number of trip requests and volunteer drivers.<sup>136</sup>

### *Marketing*

Successful marketing strategies can assist in promoting the concept of mobility management and increasing the use of services. SWCAP equips volunteers with brochures, cards and shirts that advertise the service, and that has shown to be effective.<sup>137</sup> MCTS has a DVD that has been successful in marketing transit to seniors and individuals with disabilities.<sup>138</sup> Networking and advertising is helping to improve mobility management practices.<sup>139</sup>

### *Training/Education*

Training and education for both mobility managers and the public is essential. The mobility management training program laid out through WAMM is beneficial for those who would like to become mobility managers.<sup>140</sup> Obtaining knowledge about community needs is important and can lead to collaborations and new programs. In Door County, many services got started because of mobility managers determining needs.<sup>141</sup> In the Fox Valley area, ThedaCare's Community Health Action Team completed a study that looked at what a senior would need to do in order to figure out transportation service options. The results of the study showed how difficult it was. That was the impetus for transportation programs for seniors in the area, such as Making the Ride Happen at LSS.<sup>142</sup> Increasing these types of collaborations and education about issues can lead to improved mobility management services. Design thinking is a strategy that mobility managers could use in determining community needs and solutions.<sup>143</sup> This systematic approach to problem solving is a customer-centered process to design and test possible solutions. Trying new ideas could lead to determining more possible solutions.<sup>144</sup>

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<sup>135</sup> Stephanie Levenhagen.

<sup>136</sup> Ashley Nedeau-Owen.

<sup>137</sup> Ibid.

<sup>138</sup> Tom Kenney.

<sup>139</sup> Terrence Dwyer.

<sup>140</sup> Denise Larson.

<sup>141</sup> Pam Busch.

<sup>142</sup> Holly Keenan.

<sup>143</sup> Margaux Shields.

<sup>144</sup> Jeff Segebrecht.

### Other States and National Organizations

In corresponding with other states and national organizations, best practices were obtained that could be added to the examples found in Wisconsin. These best practices exist in the same categories of programs and organizations, coordination and collaboration, technology, marketing and training and education.

#### *Programs/Organizations*

Many national programs can be great resources for mobility managers. The Partnership for Mobility Management has a LinkedIn group of the same name that is run by a staff person at the CTAA and is helpful in networking and answering questions. United We Ride and NCMM provide regional ambassadors or liaisons who can provide assistance with the development and implementation of mobility management practices.<sup>145</sup> The NCMM is also working on a new program to develop performance measures and competencies and also provide a curriculum to states that could be used to obtain a nationally recognized credential. Providing the option of obtaining such a credential could make the field be viewed as more professional.<sup>146</sup> In addition to national organizations or programs, having the state DOT supportive of mobility management programs can assist states in furthering the concept.<sup>147</sup> In Ohio a cabinet-level committee has been recommended. Hopefully it will form and come up with recommendations.<sup>148</sup>

#### *Coordination/Collaboration*

Coordination and collaboration is essential for successful mobility management. Coordination between local, state and national levels creates both a top down and bottom up approach that can assist in creating stronger mobility management networks.<sup>149</sup> Minnesota is pursuing a new model to create better coordination. Currently in Minnesota there is MCOTA which is an active state-level transportation coordination council. In addition to MCOTA, agencies and organizations in Minnesota would like to implement regional transportation coordination councils. The implementation of these councils is a collaborative effort between MnDOT, Minnesota Department of Human Services (DHS), other state agencies, the Metropolitan Council and other local governments and organizations. The councils' primary mission would be to coordinate services. It would also work to educate the public. The councils would be staffed by both local mobility managers who would conduct higher-level coordination, and transportation solution specialists who would work more directly with individuals. It will be required that the councils be backed by a policy board and the make-up of that board would be directed to ensure that it is backed by people who have authority to make decisions. The councils would also be providing input to MCOTA. Funding for the councils will be provided by the state not the federal government. DHS funding could possibly be distributed through the councils as well. This plan

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<sup>145</sup> Jeremy Johnson-Miller.

<sup>146</sup> Judy Shanley.

<sup>147</sup> Jeremy Johnson-Miller.

<sup>148</sup> David Walker.

<sup>149</sup> Judy Shanley.

is in the concept stage but is expected to move into the initiative stage in late summer or early fall 2015.<sup>150</sup>

### *Technology*

Websites can serve as a useful tool in mobility management practices. Some of the mobility management projects that have been funded by ODOT have created user-friendly websites that provide clear and comprehensive lists of transportation resources, services and descriptions, educational materials for different users, travel training information and useful links to other state and national programs. In addition to this, one of the websites provides narration for some of the pages, a useful tool for those who are unable to see or read.<sup>151</sup> Minnesota's CoordinateMNTransit.org website provides a lot of information for mobility managers and the public including how to get started on transit coordination, information about MCOTA, events, regional coordination plans, provider directories, government regulations, reports/presentations and helpful resources. The website also has an interactive web-based map of non-profit providers by service areas.<sup>152</sup> The NCMM operates a Mobility Management Information Practices (MMIP) database that compiles practices that are submitted into an interactive database and map that is searchable by FTA region, political jurisdiction, type of practice and community demographic (rural, urban, etc.). This database facilitates the sharing of ideas and practices between communities.<sup>153</sup> In Florida a veteran's grant allowed a number of counties to obtain the same software package. This provides better integration of county services and allows for easier cross county transportation.<sup>154</sup>

### *Marketing*

Marketing can assist in addressing the information barrier to improved mobility management. The Iowa DOT created a brochure template that mobility coordinators can use to develop their own brochures about mobility management practices in their region.<sup>155</sup> This can save regional coordinators time and money and can create a coordinated feel for the materials that are being distributed around the state.

### *Training/Education*

The NCMM provides a number of tools that are useful for mobility management training and education. These include a grant writing tool, job descriptions and materials to educate people

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<sup>150</sup> Noel Shughart.

<sup>151</sup> "Mobility Management," *WSOS Community Action*, accessed June 2015, <http://www.wsos.org/mobility/index.php>; *Athens Mobility Management*, accessed June 2015, <http://www.athensmobility.com/>.

<sup>152</sup> *CoordinateMNTransit.org*, accessed June 2015, <http://www.coordinatemntransit.org/>.

<sup>153</sup> "Share Your Practices," *National Center for Mobility Management*, accessed June 2015, <http://nationalcenterformobilitymanagement.org/share-your-practices/>.

<sup>154</sup> Steve Holmes.

<sup>155</sup> Jeremy Johnson-Miller.

about the importance of serving individuals outside of a targeted population.<sup>156</sup> The Iowa DOT stresses the importance of having mobility managers out in a community educating the public and learning about community needs. Seniors and individuals with disabilities can be a little more apprehensive about going out on their own. Developing attachments to mobility managers can assist in making them feel more comfortable and can serve as an individual's link to the outside world.<sup>157</sup>

## **Policy Goals**

There are certain goals and objectives that WisDOT would hope to accomplish if more funding became available or changes to programs were made in relation to mobility management.

### Goals

#### *Efficiency*

Efficiency looks at how resources are used for mobility management. Utilizing the resources to the greatest extent possible to meet the needs for mobility management is what WisDOT hopes to accomplish. Resources should be used to produce effective mobility management without wasting time or energy.

#### *Effectiveness*

Effectiveness takes into account how successful practices are in providing mobility management. The goal of effectiveness is to maximize mobility management services and funding in Wisconsin.

#### *Equity*

Equity does not mean that all areas need to be treated equally but that all areas are treated fairly or impartially. The goal for mobility management is to have a fair distribution of resources across the state.

#### *Feasibility*

Feasibility is the understanding of whether or not certain mobility management options can be implemented in Wisconsin. It is important to understand the resources available and the corresponding regulations to find the best practices that can be implemented.

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<sup>156</sup> Judy Shanley.

<sup>157</sup> Jeremy Johnson-Miller.

## Objectives

### *Efficiency*

The objective of efficient mobility management in Wisconsin takes into account funding sources and shared resources. Increased coordination between organizations and across programs can maximize resources. Efficient mobility management can be increased by ensuring that there are no overlapping services. Leveraging other funding sources can offer more resources to providing services.

### *Effectiveness*

In order to maximize mobility management in the state, it is important to consider service quality, coverage and sustainability. Effective service quality includes having mobility managers who are knowledgeable and providing mobility management services that are coordinated and comprehensive. Mobility management practices could be expanded to include more comprehensive and coordinated coverage of services. Expanding services is important, but making sure that they are also sustainable is just as important. In order for a service to be effective, it must also be maintained without a great expense of resources.

### *Equity*

Coverage of services is also an equity objective. Rural areas currently have less coverage, and services should be promoted more in these areas. There are also gaps and deficiencies in services that are unfair to some users. Providing services that meet the needs of more users would be more equitable.

### *Feasibility*

For feasible mobility management options in Wisconsin, it is necessary to consider what statutes and rules allow. For options that are allowed, it is the objective to have the capacity to implement them. Capacity can include local and state resources including personnel.

## **Recommendations for Further Action**

Recommendations for further action were derived from analyzing existing services versus policy goals. Goals of efficiency, effectiveness and equity could be addressed through increased coordination and collaboration which could narrow the gaps in service and meet the needs of more individuals. Further action could include revisiting the strategies that were put forth in the Wisconsin Human Service Transportation Coordination Model that was completed in 2008. This model identified many of the same barriers and goals for transportation coordination and included ways to increase coordination at the state, regional and local level.<sup>158</sup>

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<sup>158</sup> Wisconsin Department of Transportation, *Wisconsin Human Service Transportation Coordination Model Final Report* (Madison: 2007), <http://wisconsindot.gov/Documents/doing-bus/local-gov/astnce-pgms/transit/coordination/model-coord.pdf>.



The lack of information for both individuals and mobility managers was identified as a barrier to improved mobility management practices. Further action could include the development of strategic marketing materials for transportation options.

Lastly, a cost benefit study examining the expense to provide different types of mobility management services versus the attendant gains from the activities would be useful.

## **Conclusion**

This report presents a look at mobility management practices in Wisconsin. The surveys and research conducted provided WisDOT with insight into mobility management service types, coverage areas, funding options, barriers and opportunities. Wisconsin mobility management service examples and coverage maps of coordination and collaboration, training, research and development and transportation marketing, provide an idea of service areas and gaps. There are barriers, such as coordination and funding that will need to be addressed in order to make progress on the opportunities for growth. Other state and national surveys and research provided an idea of mobility management practices outside of Wisconsin. Similarities with Wisconsin were identified in federal funding sources and barriers of funding, lack of coordination and collaboration and information. The differences were shown in some definitions and structure of mobility management or coordination programs. Best practices from Wisconsin and other states and national organizations, along with clearly defined policy goals, can assist in deriving recommendations. These recommendations for further action could address the lack of coordination and collaboration and information barriers and lead to improved mobility management practices in Wisconsin.

## Appendix 1: Wisconsin Survey Participants

\*Wisconsin Mobility Managers Survey \*\*Wisconsin Counties Survey

<b>Name</b>	<b>Organization</b>
Ashley Nedeau-Owen*	Southwestern WI Community Action Program (SWCAP)
Barbara Bauer**	ADRC of Florence County
Cammi DeWyre**	Pepin County Human Services – Aging Unit
Carrie Porter*	Greater WI Agency on Aging Resources (GWAAR)
Dawn Tart*	Namekagon Transit
Debbie Martineau**	Ashland County Aging Unit
Denise Larson*	Center for Independent Living for Western WI
Don Natzke*	Milwaukee County Transit System (MCTS)
Elizabeth Quigley**	Senior Connections Wisconsin
Holly Keenan*	Lutheran Social Services of Wisconsin and Upper Michigan (LSS)
Janine Dobson**	ADRC of the North – Price County
Jeff Segebrecht*	Southwestern WI Community Action Program (SWCAP)
Karen Melasecca*	Namekagon Transit
Kathy Gauger**	Senior Services of Trempealeau County
Lynette Gates**	Jackson County Aging Unit
Margaux Shields*	Interfaith Senior Programs Waukesha
Mary Basak**	Marinette County Elderly Services
Mike Glasgow**	ADRC of Waukesha County
Nathanael Brown**	Taylor County Commission on Aging
Nick Musson*	East Central WI Regional Planning Commission (ECWRPC)
Pam Busch*	Door-Tran
Pamella Kernan*	Clark County Department of Social Services
Peggy Zielinski*	Northeastern WI Community Action Program (NEWCAP)
Rebecca Hinzmann**	ADRC of Eau Claire County
Sarah Street**	Racine County Human Services
Sheryl Kisling**	Indianhead Community Action Agency
Stephanie Levenhagen*	Dodge County Human Services and Health
Stephanie Villella**	ADRC of Washburn County
Susan Lemke*	Stevens Point Transit
Susan Torum**	ADRC of Jefferson County
Terrence Dwyer*	Tomah VA
Tom Kenney*	Milwaukee County Transit System (MCTS)
Tom Stratton**	Outagamie County Department of Health and Human Services
Tonya Eichelt**	ADRC of Northwest WI – Polk County
Vicki Holden**	ADRC of Dunn County

Note: 13 survey participants chose to remain anonymous

## Appendix 2: Other State and National Survey Participants

<b>Name</b>	<b>Organization</b>
David Walker	Ohio Department of Transportation – Office of Transit
Ed Coven	Florida Department of Transportation – Public Transit Office
Jeremy Johnson-Miller	Iowa Department of Transportation – Office of Public Transit
Judy Shanley	National Center for Mobility Management and Easter Seals
Noel Shughart	Minnesota Department of Transportation – Office of Transit
Steve Holmes	Florida Commission for the Transportation Disadvantaged

### **Appendix 3: Wisconsin Mobility Managers Survey**

1. Are you a certified mobility manager?
2. What service area do you cover?
3. Which tasks do you handle? (Check all that apply)
  - a. Conduct needs assessments
  - b. Travel training
  - c. Coordinate services or programs
  - d. Transportation marketing
  - e. Promote collaboration between areas and services
  - f. Develop inventory of available services
  - g. Identify customer needs
  - h. Develop strategies to meet customer needs
  - i. Coordinate funding
  - j. Train volunteers
  - k. Trip planning
  - l. Other (fill in)
4. How are the mobility management services funded?
5. Do you work with other organizations or service providers to provide mobility management services? (ex: non-profit, public, private)
6. What do you think are barriers to improved mobility management?
7. Have you seen specific areas where there has been growth or could be growth if funding is available?
8. Are there certain tools or materials that have been more successful than others?
9. Would you be willing to participate in a follow up phone call?
10. Do you have recommendations for other people to contact?

## Appendix 4: Wisconsin Counties Survey

1. Are you a mobility manager?
2. If yes, are you a certified mobility manager?
3. If you are not a mobility manager, do you have mobility managers on staff? Full or part-time?
4. If you don't have a mobility manager, but you have staff that do any of the tasks listed below what is their title?
5. What is your service area?
6. Do you have staff that do the following tasks (check all that apply)
  - a. Conduct needs assessments
  - b. Travel training
  - c. Coordinate services or programs
  - d. Transportation marketing
  - e. Promote collaboration between areas and services
  - f. Develop inventory of available services
  - g. Identify customer needs
  - h. Develop strategies to meet customer needs
  - i. Coordinate funding
  - j. Train volunteers
  - k. Trip planning
7. How are the mobility management services funded?
8. Are you aware of anyone from an outside agency that is providing mobility management services in your area?
9. What do you think are barriers to improved mobility management?

## Appendix 5: Other States and National Organizations Survey

1. How is mobility management structured in the state?
2. How does the state define a mobility manager?
3. What is the relationship between the state Department of Transportation and mobility management?
4. What other organizations do you work with to provide mobility management services?
5. Which tasks do you handle?
  - a. Conduct needs assessments
  - b. Travel training
  - c. Coordinate services or programs
  - d. Transportation Education
  - e. Promote collaboration between areas and services
  - f. Develop inventory of available services
  - g. Identify customer needs
  - h. Develop strategies to meet customer needs
  - i. Coordinate funding
  - j. Train volunteers
  - k. Trip planning
  - l. Other (fill in)
6. How are mobility managers or mobility management services funded?
7. What do you think are barriers to improved mobility management?
8. Have you seen specific areas where there has been growth or could be growth if funding is available?
9. Are there certain tools or materials that have been more successful than others?