



MEMORANDUM

To: TAC
From: Paratransit Coordination Team
Date: September 9, 2011
Subject: Staff Recommendation for CMMP Pilot Projects

The Coordination and Mobility Management Planning (CMMP) project was undertaken to fulfill the following objectives:

- Facilitate discussion of how providers in each area can better work together, support each other, and/or coordinate or consolidate services or elements of services
- Identify and build consensus around future actions to coordinate services or implement mobility management activities
- Identify potential roles for the Alameda CTC in supporting implementation of coordination/mobility management activities (including provision of targeted funding)
- Identify a pilot project or projects that can move forward for implementation
- Provide input for Countywide Transportation Plan and Transportation Expenditure Plan for new Measure B (proposed to go to voters in 2012)

CMMP was a major focus of Alameda County's Paratransit Program last year and, to a large extent, these objectives have been met. We held meetings in each area of the county and countywide, and discussed a wide range of potential areas of coordination. There was a great deal of mutual learning for program sponsors and staff; many of the lessons can be applied in the development of new master funding agreements, the Countywide Transportation Plan and the Transportation Expenditure Plan.

The final step of the CMMP process is approval of the following CMMP pilot projects to move forward for implementation in FY2011-2012, each described later in this memo:

- Establishment of Uniform Taxi Policies for North County
- Expansion of South County Taxi Program to Central County
- Tri-City Mobility Management Project

There were a number of considerations that played into selection of the recommended pilots:

Mobility Management: We would like to move towards a mobility management model in Alameda County that would allow users more flexibility and convenience; improve coordination across programs; and improve cost effectiveness. Mobility management encompasses a wide range of possible activities including centralized trip referral, trip planning and scheduling, and provision of comprehensive, multi-lingual information to consumers to help them understand the range of travel options available to them. Ideally, consumers are trained and empowered to do their own “mobility management” over time. Mobility management combined with travel training can also help match each user to the most appropriate and cost effective service for making each trip which can entail cost savings. These types of mobility management programs are increasingly important to address anticipated growth in the senior and disabled population in the face of a constrained funding environment; we need to provide services more cost effectively. The mini-mobility management pilot in the South County planning area is a way to pilot mobility management on a smaller scale for possible replication in other planning areas in the future.

Universal Program Parameters/Policies: Second, at the May Countywide CMMP meeting, our discussion indicated that it would be beneficial to create more uniformity throughout the County in program design, service parameters and availability of services across the County. These objectives would improve equity and reduce confusion for new users, social service providers and tax payers. Meeting this goal was a key driver in selection of the pilot projects.

Suite of Programs: At the May meeting, the idea was also proposed that each area of the county could have an array of available services that cross jurisdictional boundaries of the cities within a specific planning area and potentially even into other planning areas. This would enable us to identify a “suite” of complementary programs in each region of the County that is tailored to the unique needs of that planning area. Ideally, this mix of services would avoid redundancy between services. Paired with travel training and mobility management, users could be matched to the best service to meet each trip need. Taxi programs are an ideal component of this “suite” due to their unique flexibility to meet same day trip needs. Therefore, establishing coordinated taxi programs in each region of the County is a key first step towards developing an optimal suite of programs for each planning area.

Financial Constraints: As we are all too aware, the economic recession has had a notable impact on Alameda County transportation programs due to the decline in Measure B sales tax revenue. We are seeking to proactively address stark financial realities and projections for increasing demand that may impact the long term financial sustainability of senior and disabled transportation programs in Alameda County. We need to make every dollar go farther and ensure cost effectiveness and program sustainability is a key consideration in our decisions moving forward.

More uniformity in program parameters will allow for more control over costs. This is true for taxi programs in particular, because costs are driven largely by rules about trip lengths and subsidy levels. For example, the taxi program parameters vary widely across the county and therefore the cost per trip for taxi programs in the County ranges from \$12-\$37 per trip. We hope the two taxi pilots described below allow the Alameda CTC and programs to have a better understanding of and control over program costs.

We have selected the recommended pilots because they are best positioned to meet these goals.

We recognize that there can be challenges in increasing coordination between programs that have historically had a lot of autonomy. Staff will work closely with TAC, PAPCO and the program

sponsors to ensure successful implementation of these pilots and to minimize impacts on customers and burdens on staff. We are seeking your involvement and collaboration in pilot project implementation.

CMMP Implementation Timeline

Date	Action
September 2011	Ask for TAC concurrence and PAPCO recommendation on pilots
October 2011	Ask for Commission approval on pilots
November 2011 – June 2013	Implementation of pilots

Budget for CMMP Pilot Project Design and Implementation

PAPCO approved designation of \$500,000 of Measure B funds for design and implementation of CMMP pilot projects during the FY10-11 Gap Grant funding cycle in February 2011. Any remaining CMMP funding was to be available for technical assistance to Measure B pass-through recipients to establish programs that would fill gaps or enhance Mobility Management. These funds are provided with the intention that any ongoing costs would be absorbed into the base programs or have an alternate plan for sustainability of funding.

The recommended funding amount for each program and the remaining balance is shown in the chart below. These funding recommendations are explained in the project descriptions below.

Pilot Project	CMMP Funding Recommendation
Establishment of Uniform Taxi Policies for North County	\$85,000
Expansion of South County Taxi Program to Central County	\$81,744 <i>(+\$173,256 in non-CMMP funds)</i>
Tri-City Mobility Management Project	\$114,500
TOTAL	\$281,244
Remaining CMMP Funds	\$218,756

Pilot Project Descriptions

Each pilot is described on the following pages including a funding recommendation and a brief description of the different aspects of program design that will need to be addressed in order to implement the pilots. This is only an initial list of considerations based on discussions at the CMMP meetings. Once design of each pilot is underway, more issues may arise that need to be addressed based on additional input from both TAC and PAPCO.

Establishment of Uniform Taxi Policies for North County

Definition

This pilot would involve implementing a single set of taxi program parameters (fares, eligibility criteria, trip limits, service area, etc.) for all five North County taxi programs.

Discussion/Rationale

Better coordination between the five North County taxi programs was discussed at the North County CMMP meeting. The possibility of creating one single universal North County taxi program was discussed, but a number of barriers were identified. Overcoming the operational challenges involved in unifying all programs under one single contract is too big for a CMMP pilot and does not appear appropriate at this juncture. However, based on the discussion at the final Countywide CMMP meetings, it appears that some level of universal program policies, e.g. fares, eligibility criteria, trip limits, would be a significant step towards achieving equity across programs from the users' perspective, would further coordination and improve user experience by enabling travel throughout North County. It would also allow for more control over costs, as taxi costs are driven largely by policies that determine trip lengths and subsidy levels. In the recent financial analysis that was conducted, cost per trip for taxi programs in North County ranged from \$12-\$37 per trip.

Pilot Project Description

This pilot project will involve working with the five city programs to design a set of universal policies that can be implemented at each of the programs. The five programs that this will affect are: Alameda, Albany, Berkeley, Emeryville and Oakland. Once the policies are selected and approved by the TAC and PAPCO, they will be adopted by each City and the required adjustments made to their taxi programs. The following are the policy areas that will be considered as part of this pilot.

ELIGIBILITY: There is currently inconsistency in eligibility between programs. Universal eligibility rules would be established under this pilot. Changing the program eligibility criteria could either expand or contract the number of eligible users in each city. A closer look at the potential impacts on customers in the different jurisdictions will be a critical part of establishing a single eligibility policy. As discussed in the introduction above, implementation of these pilots is a first step in moving towards establishing a complementary "suite" of programs in each region of the County. Efforts will be made to avoid creating new same day service gaps and to identify any significant differentials in need between cities.

FARES: There is currently a very broad range of fares, ranging from free, to percentage of meter, to books of vouchers. Determining the types of trip a taxi program is intended to serve (with relation to other travel options) could help define an appropriate common fare, or a small number of fare options.

TRIP LIMITS & SERVICE AREA: Programs also vary with respect to trip limits. Vouchers or scrip made available in a variety of denominations would allow flexibility for variable trip lengths if different cities require different service coverage. Again, determining the types of trip this program is designed to serve will provide key input to help define an appropriate trip limit rule. It would also be advantageous to allow users to take trips throughout North County through this program. This level of coordination will be explored under this pilot.

ADMINISTRATION: The question of whether there will be any centralized administrative functions, such as printing vouchers or scrip, will need to be addressed.

TAXI ORDINANCES: One implementation mechanism for universal taxi program policies would be through modification of taxi ordinances in each City. The ordinance could require acceptance of vouchers by all taxi companies for travel anywhere in North County. This would maximize flexibility for users.

Barriers to taxi ordinances have been identified in the past; these would have to be addressed.

CURRENT CONTRACTS: Implementing new program policies raises the question of conflicting with policies contained in existing contracts. Albany and Emeryville do not have contracts. For the other three cities, staff does not currently know exact contract provisions or expirations. However, Alameda and Oakland are funded almost exclusively through Measure B, so perhaps a contract provision has been incorporated to allow for adjustments associated with funding approval every year. This would allow the program changes envisioned here to be made without disrupting the current contract. This will be a key point of discussion in program design.

Interface with Implementing Guidelines

The Implementing Guidelines for all Measure B-funded Paratransit programs, which are currently under development, may establish parameters for taxi programs throughout the County. If adopted, these will form the basis for this pilot. The pilot will then focus on establishing uniform policies for those parameters not covered by the implementing guidelines as well as the substantive work of actually implementing these new policies and parameters in the diverse taxi programs across North County. This pilot entails more coordination than has ever been undertaken in North County previously. The Paratransit Coordination Team will facilitate coordination, serve as the liaison between programs and with the Alameda CTC and provide needed technical assistance to programs to actually operationalize and create the day-to-day procedures necessary to implement the new policies. Individual attention will have to be paid to each of the five taxi programs currently under operation to ensure as smooth a transition as possible and to minimize negative impacts on customers in each city. For example, activities could include analyzing affected populations and determining whether any grandfathering needs to occur to avoid creating gaps and decreasing the mobility of vulnerable populations.

The Paratransit Coordination Team will also focus on designing the implementation of this pilot to enable monitoring and evaluation over time. To the degree possible, the Team will put systems in place for post-program analysis to allow for alterations to program design if necessary and recommendations for future programs.

Next Steps

The next step for designing this pilot project is to arrange a brief phone interview with each program to discuss specific barriers or concerns they may have about implementation of the pilot in that city. Those conversations will inform the agenda for a meeting of all the North County TAC members to commence discussions on universal policies. We anticipate the need for a number of follow up meetings to generate consensus around a single set of policies. To the degree possible, this will be accomplished at or after standing TAC meetings, though additional meetings may be necessary. If consensus cannot be reached on specific issues, PAPCO and Alameda CTC management may be required to participate more actively in the final decision-making process.

We recognize that City staff does not have extra time to develop these policies as they are already stretched thin with current responsibilities. The Paratransit Coordination Team will provide any necessary technical assistance such as analysis to assess impacts of different policies for each City, will coordinate and facilitate all meetings, and will draft recommendations and incorporate rounds of revisions as consensus is being built. We will, however, need TAC time for attendance at the necessary meetings.

Timeline

FY 2011-2012 will be focused on design and consumer notification/buy-in. The goal will be to implement new policies on July 1, 2012 and focus on evaluation of policy changes and their budgetary impacts in FY 2012-2013. This allows for the current FY 2011-2012 plans that have already been approved by PAPCO and the Commission to run their course. New policies will be included in next year's program plans. Therefore, all policies must be finalized and funding needs for the first year identified before the Program Plan due date of March 31.

A key component of this effort will be developing a strategy for communicating these changes to consumers. The Paratransit Coordination Team will assist with this effort and collaborate in North County TAC meetings to design outreach strategies. Programs can communicate changes through their standard consumer outreach activities, ideally starting in early 2012.

The following pilot implementation timeline takes these factors into consideration. As discussions on the universal policies commence, more meetings may be needed and the timeline for finalization of policies may shift to February.

2011	
October	Pilot Funding for recommended projects approved (Board Mtg. 10/27)
Early November	Phone Interviews with Individual Programs to identify barriers/concerns
Mid-November	Discuss universal policies at TAC meeting (11/8)
December	Potential Special North County TAC meeting
2012	
January	TAC approval of universal policies PAPCO approval of universal policies
February	Outreach to consumers Refine cost estimates for first year of pilot
March	Program Plans due
FY 2012-2014	Observe and evaluate policy changes in practice and assess budgetary impacts Additional refinement of cost estimates for second year of pilot, particularly for grandfathering and increased demand

Funding

The North County taxi programs are currently funded through each program's pass-through allocation (some cities also supplement with other sources, such as city general funds). Depending on the revisions to the policies, funding needs for North County taxi programs may rise or fall. Funding needs depend on many factors, including subsidy level per trip, number of eligible riders, level of use of the program by eligible riders, and trip lengths, among others. The intent of this pilot program is to make our limited program dollars go farther, so cost effectiveness of trips will be a key consideration in designing the policies. However, these considerations will need to be balanced by a goal of minimizing impact on current registrants.

As a result, there are three primary potential funding needs for this pilot, each is described in more detail below:

1. The initial funding need for this pilot project is for staff time to design, build consensus around and then implement the policies.

2. If policies result in an increased number or length of trips, additional funding will be needed to cover these new costs. The level of funding needed will depend on what policies are adopted and the level of usage that results after the policies are implemented.
3. Depending on the ultimate set of policies adopted, TAC and PAPCO may decide to allocate funding to grandfather in a subset of consumers who are currently eligible, but who would be excluded from service as a result of policy changes.

Staff recommends setting aside \$35,000 for the Paratransit Coordination Team to design this program, to conduct any necessary background and impacts analysis, provide technical assistance to the CTC and to individual program sponsors, incorporate comments and adjust parameters based on discussions, prepare meeting materials, and facilitate discussion at meetings.

Staff recommends setting aside \$50,000 of gap funds to cover potential increased costs resulting from the new policies as well as grandfathered consumer trips. Depending on subsidy levels, eligibility criteria and the volume of voucher purchases, more gap funds may be needed to cover the cost of North County taxi trips. The Paratransit Coordination Team will work with project sponsors this fall and winter to factor the new policies into their program plans and determine whether additional funding will be necessary. A refined cost estimate can be generated in the spring.

North County Taxi Policies Pilot CMMP Funding Request	\$85,000
Program Design for Paratransit Coordination Team	\$35,000
Consumer Trip Grandfathering (may need to be adjusted in spring 2012)	\$50,000

Expansion of South County Taxi Program to Central County

Definition

This pilot would expand the existing South County taxi program to include Central County customers as well.

Discussion/Justification

Establishing a taxi program in Central County fills a clearly identified service gap. It also furthers the goal of coordination across planning areas by building on the successful existing South County Taxi program.

Project Description

This pilot would involve expanding the service area covered by the South County “Tri-City Taxi Program” to include Central County consumers as well. In the short term, we recommend expanding this program with its current policies in place to the degree possible. However, there are a number of program design details that will still need to be worked out:

TRIP LIMITS: We would like to design this program to maximize flexibility for users, allowing trips between South and Central Counties and allowing users from South County to use a taxi in Central County and vice versa. This may require some adjustments to the trip limits policy currently in place.

SERVICE QUALITY: Service quality and responsiveness is a current concern held by the Alameda CTC and City staff with the current contracted service (St. Mini Cab) in South County. Upon expansion of the program, service quality will have to be carefully examined/monitored and Alameda CTC may want to consider seeking an alternative service provider or another agency to administer the contract. This will require more discussion between South and Central County staff, the Alameda CTC and the Paratransit Coordination Team.

ADMINISTRATION: Currently the Alameda CTC is the primary administrator for the program, while outreach and voucher distribution are managed at a city level. For initial expansion to Central County, this arrangement will likely remain. However, in the future, housing program administration in Central or South County may need to be considered.

Next Steps

Upon approval of pilot project funding, a meeting between South and Central TAC members will be necessary to finalize the implementation policies, discuss whether an alternative service provider may be necessary and work out any other concerns that the program sponsors – Fremont, Hayward, San Leandro, Newark and Union City – may have and discuss the procurement process. Other necessary steps include training of the new jurisdictions and printing of vouchers.

Timeline

The timeline for this pilot project depends on the procurement process. The initial goal for this pilot is commencing service by March 2012, earlier if possible. This timeline may need to be adjusted after issues are identified in discussions with the South and Central County programs.

2011	
October	Pilot Funding for specific project approved (Board Mtg. 10/27)
Mid-November	Discuss pilot at TAC meeting (11/8)
December	Potential Special Central/South County TAC meeting
2012	
January	Contract for Taxi Services in Central County
February-March	Commence Taxi Service in Central County Outreach to consumers

Funding

The high level cost estimate developed by staff for this pilot is \$120,000. This was based on applying the differential in funding formula population between South and Central County to the current costs of the South County Taxi program. In other words, the total South County taxi contractor cost for FY 2009-2010 was \$71,000; the population of Central County is 1.6 times greater than South County. Therefore, the approximate cost for Central County expansion would be 1.6 x \$71,000, or \$113,600. We have increased this slightly to account for an annual cost increase.

Based on these estimates, staff recommends that \$240,000 will be needed for the Central County portion of a two year pilot joint Central-South County Taxi Program. We recommend apportioning costs between Hayward and San Leandro based on the pass-through formula which incorporates population of seniors and people with disabilities, as shown in the chart below. We recommend that Hayward's portion of the program costs come from already allocated Measure B pass-through funding for special transportation, since these have not yet been expended, and that San Leandro's portion be allocated from CMMP funds.

Since the technical assistance required for this pilot should be less complex than the North County pilot, a Paratransit Coordination Team budget of \$15,000 is recommended. The grand total budget request for this pilot project is \$255,000 over two years.

Both cities are expected to absorb the administration tasks (e.g. distribution of vouchers) as part of their current operations.

The role of the gap grant funding program is currently being considering by the Alameda CTC. Financial sustainability of gap-grant funded pilot projects, such as this, will be considered as part of that process.

Central County Taxi Program Total Funding Need – 2 years	\$255,000	
Hayward Portion – Existing Hayward pass-through funds	72.19%	\$173,256
San Leandro Portion – CMMP Funds	27.81%	\$66,744
Paratransit Coordination Team – CMMP Funds	\$15,000	
Total CMMP Funding Request	\$81,744	

Tri-City Mobility Management Project

Definition

The project will create a bilingual team of mobility managers whom consumers could call or visit for assistance with individualized transportation planning and transportation service linkage. Individualized transportation planning will be provided to seniors and persons with disabilities based on their functional abilities, their preferred modes of travel, and the most cost-effective mobility and transportation service options. The project will assist consumers in accessing the following types of services:

- Fixed route transit
- City-based paratransit services
- ADA paratransit services
- Tri-City Taxi Voucher Program
- Tri-City Travel Training Program
- VIP Rides Program
- Older driver safety training and information
- General information on where to find other needed services (referrals to Tri-City Senior Helpline and 211)

Discussion/Justification

This project addresses the need for comprehensive, multi-lingual information regarding mobility options for elderly and disabled residents of the Tri-Cities area (Fremont, Newark and Union City). Potential project benefits include:

- Increased level of transportation service coordination
- Increased mobility for seniors and persons with disabilities
- Increased consumer satisfaction regarding service access
- Reduced consumer confusion about transportation options

Project Description

The City of Fremont will recruit, hire and supervise a small team of bilingual outreach workers (ideally: Mandarin, Spanish and Farsi-speaking) to provide mobility management services for seniors and persons with disabilities in the Tri-City area. These outreach workers will help consumers navigate the transportation system to find the most appropriate and cost effective modes of travel for their specific needs. The City will provide a program manager responsible for project development, implementation and supervision of mobility management activities and evaluation of project effectiveness. Project implementation period: December 2011 – June 2013

Project activities will include:

ESTABLISH BETTER SERVICE COORDINATION WITH EBP

1. Establish East Bay Paratransit satellite office in Fremont to facilitate in-person ADA paratransit certification interviews for residents of Southern Alameda County. The City will provide the office space at no cost. CMMP funds might be used for minimal additional costs for office set up. Tentative scheduled opening of satellite office: January 2012.

2. Outreach workers will meet with EBP applicants and conduct an individualized transportation assessment and then refer applicants to appropriate transportation services, offering additional assistance in connecting consumer to services as needed.
3. Coordinate rides for Fremont and Newark residents who are applying for ADA services and need transportation to the EBP certification interview. City-based services can offer a more cost effective trip to transport applicants to the interviews.
4. Help coordinate alternative transportation services while EBP applicant is awaiting ADA certification.
5. Provide problem solving assistance to consumers experiencing difficulties with East Bay Paratransit service.

PROVIDE MORE INTEGRATED OUTREACH/EDUCATION

1. Provide individualized transportation planning, information and referral, and service linkage for seniors and persons with disabilities seeking information and/or access to transportation and mobility services. These services will take place at the following sites:
 - a. Fremont City Hall, Human Service Department
 - b. Community locations in Fremont, Newark and Union City (monthly office hours will be established for each of the three satellite service sites)
 - c. Consumer’s place of residence, as needed
2. Coordinate group outreach presentations at various community locations. Work with partner agencies, where appropriate, to present for the following community outreach events:
 - a. Transportation/Mobility Resource Fair (one per year)
 - b. Paratransit Service presentations, with on-site enrollment as feasible (Minimum of 12 per year)
 - c. Older Driver Safety presentations (6 times per year total, 2 in each city)
 - d. Clipper Card presentations (6 times per year total, 2 in each city)

EXPAND KNOWLEDGE BASE AND IMPROVE SERVICE COORDINATION WITH TRI-CITY AREA SOCIAL SERVICE PROVIDERS.

1. Provide training to Tri-City area service providers on the spectrum of mobility and transportation resources available to seniors and people with disabilities.
2. Work with AC Transit, Union City Transit and BART to facilitate rider advocacy and/or education efforts, such as dissemination of service change announcements, placement of bus shelters, signage at transit centers, requests for driver training, etc.
3. Evaluate the possibility of expanding the role of the existing paratransit advisory body to identify service gaps and opportunities for improved coordination related to the planning and implementation of transportation/mobility services.

EVALUATE EFFECTIVENESS OF MOBILITY MANAGEMENT ACTIVITIES: Develop and implement consumer and program tracking mechanisms to measure the effectiveness of mobility management activities in the Tri-City area.

Next Steps

Upon approval of funding, Fremont will move forward with hiring the team of bilingual outreach workers and work with EBP on establishment of the EBP satellite office. Additionally, a workplan will be developed in December to facilitate project implementation activities during the first six months.

Timeline

2011	
October 2011	Pilot Funding approved (Board Mtg. 10/27)
November	Initiate hiring of outreach workers Working with EBP to set up satellite office
December	Initial training of outreach workers, pending successful hiring process Development of six month workplan for project implementation Development of program intake and outreach materials Office set-up for outreach workers
2012	
January 2012	Launch mobility management Open EBP satellite office Begin conducting individualized transportation plans with consumers
February 2012	Identify community satellite office locations Begin conducting group outreach presentations
March 2012	Establish community satellite office locations Begin training service providers on spectrum of available mobility services
April 2012	Assess first quarter of project activities
May 2012	Develop detailed workplan for FY11/12 project activities Begin planning for Mobility and Transportation Resource Fair in September 2012

Funding

CMMP funds will be used for the salaries of the outreach workers and for the project manager’s time. Transportation expenses for applicants attending ADA-paratransit certification interviews and other miscellaneous direct service costs (i.e. printing, office supplies, computer/phone set-up and IT installation, etc.) are also included in the project budget. The overhead allocation included in the budget covers the costs for functions needed from other departments for project implementation, including: Human Resources, Finance, City Attorney’s Office, and Information Technology Support.

Tri-City Mobility Management Project CMMP Funding Request	\$114,500
Salaries for Outreach Workers	\$50,544
Salary/Benefits for Project Manager	\$34,021
Direct Costs	\$15,000
Overhead (15% required by the City of Fremont for each new project)	\$14,935