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Research Corporation

1650 Research Boulevard
Rockville, MD 20850-3195
tel: 301-251-1500
fax: 301-294-2040
www.westat.com

**PUBLIC TRANSIT – HUMAN SERVICES
TRANSPORTATION COORDINATION PLAN FOR
GREENE, MIAMI, MONTGOMERY, AND
PORTIONS OF NORTHERN WARREN COUNTY,
OHIO**

INNOVATIVE TRANSPORTATION SOLUTIONS

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WESTAT**

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Nelson\Nygaard Consulting Associates, Inc.

Nelson Development, Ltd.

Center for Urban and Public Affairs, Wright State University

INNOVATIVE TRANSPORTATION SOLUTIONS¹

OVERVIEW

A variety of innovative transportation solutions could be applicable to transportation coordination activities in the Miami Valley region. There are a large number of innovative transportation options now in place or about to be implemented across the United States and in other countries. For the Miami Valley region, innovative solutions to solving the region's transportation problems need to consider the community's attributes, issues, and desired outcomes for well-coordinated and cost-effective transportation services.

In assessing the potential option, the focus should be on each option's ability to improve transportation services in the region. The pages that follow discuss some of these options and their implementation in various communities.

STRATEGIC APPROACHES TO REGIONAL TRANSPORTATION GAPS AND SERVICE DEFICIENCIES

The planning process for the Miami Valley region first examined the gaps and service deficiencies currently existing in the region. The key problems identified included:

- Despite a considerable current investment -- 60 agencies now provide transportation services with 683 vehicles, 27 agencies purchase services from the provider agencies, and more than \$70 million is spent on these services --
 - Traveling across county boundaries is difficult unless you drive.
 - Non-drivers have few travel options.
 - There are many reports of difficulties in obtaining rides.
- Current transportation services are fragmented: there is some limited coordination of today's services, but there are still service gaps and overlaps, and substantial system inefficiency. Significant productivity and efficiency improvements are possible.
- No one knows or manages the entire travel options picture, and there is no place to call which could direct potential riders or their advocates to the best source of transportation to meet a specific travel need.

¹ This memorandum was written by Jon Burkhardt of Westat who also edited this memorandum and supervised its production.

The planning process next created overall strategies to address the gaps and service deficiencies in the region. These overall strategies included:

1. Maintain and expand the transportation services network available to seniors, people with disabilities, and people with low incomes.
2. Make information about that system available easily at both the county and regional level so that the public and advocates have a customer-friendly resource(s) to match travel needs with available options.
3. Actively coordinate among and between transit, human service agencies, and private providers to reduce gaps and overlaps in service.
4. Actively coordinate among and between transit, human service agencies, and private providers to reduce the costs involved in providing specialized transportation and reinvest savings in providing more service to seniors, people with disabilities, low income individuals, and the general public.

POTENTIAL INNOVATIVE TRANSPORTATION SOLUTIONS

Passenger transportation services in this country have remained relatively static for decades, but a wide variety of potential innovations are now being considered. These include developments in the following areas:

- Traveler information
 - Planning the trip from origin to destination, including potential environmental barriers and challenges
 - Knowing when vehicles will arrive
 - Information needed while traveling (stop announcements, etc.)
 - Alternative information formats suitable for persons with various disabilities and languages
- Vehicles
 - Universal design to address various accessibility issues
 - Vehicles or modes that are tailored to meet special needs
 - Intermodal connections
- Management
 - Intermodal partnerships involving coordination arrangements with various providers and purchasers
 - Intergovernmental partnerships involving coordination arrangements among multiple jurisdictions in the region
 - Contracts for services

- Mobility management involving multiple providers (not vertical chains of owned assets)
- Services
 - A wider range of services of various types and levels of assistance
 - Services of greater time spans and geographic scopes
 - Greater schedule reliability, real-time vehicle arrival notices
 - A focus on satisfying consumer preferences and choices, minimizing travel time
 - Special assistance (including escorts) as needed
 - A focus on satisfying region-wide travel demands
- Payment systems
 - Applying a wider range of funding sources
 - Fares that vary according to the level of service provided
 - Traveler subsidies for specific situations
 - Cash-less fare systems
- Cost controls
 - Contracting for services at various rates
 - The intelligent use of volunteers as drivers and other staff.

Future travelers are likely to gravitate to those services that most closely fit their specific demands. Following the lead of consumer-oriented industries like package delivery services, personal transportation services will need to focus on tailoring travel options to the wishes of individual customers. The primary focus will shift to the trip instead of the travel mode. Services that emphasize customer comfort and satisfaction are likely to be highly favored.

Contracts for various types of services with multiple kinds of service providers could provide different kinds and levels of service for differing travel needs. Advanced transportation agencies will be seen primarily as travel facilitators, not just service providers. Multiple service types at varying prices will be needed. The current heavy emphasis on one or two modes of travel will be replaced by more travel options within an overall family of services. A wide variety of services could be matched closely to the individual needs of individual travelers, with people of the highest level of independence served by the least tailored services and people with specialized needs served by the most specialized transportation services. High levels of responsiveness, speed, comfort, and flexibility will command higher prices; trips reserved in advance with scheduling dictated more by the operator than the consumer will command lower prices.²

² For further thoughts on future transportation services, see Burkhardt, Nelson, et al, *Improving Public Transit Options for Older Persons*, TCRP Report 82, Transportation Research Board, Washington, DC 2002, Section 4.

Among the innovations that should be considered for more immediate application in the Miami Valley region, the following deserve special attention:

- Centralized information services
- Transportation brokerage
- Regional transportation coordination
- Services provided by volunteers
- Taxi-assisted ADA paratransit services
- Carpools and vanpools.

In addition to these options, this memorandum also examines the Independent Transportation Network, an innovative transportation program that encompasses many of the improvements needed to create more customer-friendly transportation services.

Centralized Information Services

A key issue is how consumers of transportation services find out about the services available to them. If a centralized office is used, that office would maintain information on the services currently being offered by the existing transportation providers. Information on routes, schedules, eligible trip purposes, vehicle types, special services (e.g., assistance carrying groceries), and fares (if any) would be available at this office. Trips would be provided only to persons eligible to receive services, but the I&R service could help an individual caller determine their eligibility and then direct them to the appropriate agency. An individual could request trips either through the I&R center or through a particular social service agency.

A centralized information service should be able to tell any prospective rider about their travel choices in terms of time, destination, cost, and other factors. At one level, the central information source could be just that: a place where a prospective rider could call and get information about their travel options, with contact information provided for one or more transportation operators. At a higher level of service, the potential rider would be put in touch directly with a transportation operator, so the rider would only have had to make one call to schedule the trip he or she needs.

FindARide.org is a computerized on-line web site that describes transportation options in the Puget Sound area around Seattle, Washington. It offers links to tools such as a transit trip planner and includes a searchable database to allow people with special transportation needs, case managers, and agencies to find transportation services in the Central Puget Sound Region. The site includes information on both transit agencies and human service agencies. For travelers, FindARide can help persons plan a trip on local transit systems, find an agency to select a ride, get information to learn how to use various travel options, get help in paying for rides, join a carpool or vanpool, find how to rent or borrow a vehicle, have goods or packages delivered to their home, or get a directory of local bus services. Persons willing to provide rides for others can also sign up on this web page to provide rides.

Transportation Brokerage

A transportation broker functions as a single point of access to transportation services for travelers, service providers, and funding agencies. (In some cases, brokers will also be one of the potential service providers.) The brokerage function is typically conducted at a centralized office that not only maintains and distributes information on the services available, but also attempts to match the needs of individual riders with the services available by assigning specific trips to specific providers. The broker thus performs a distributive function among existing service providers for the trips that are requested. The activities of some brokers extend beyond the function of distributing trips to providers to also include more immediate operational functions such as reservations, scheduling, and dispatching. Brokerage functions may or may not include eligibility determinations for individuals who are requesting rides. Benefits typically associated with brokerages include cost containment, ensuring specified service levels, and quality control.

Pittsburgh's ACCESS program is one of the longest-running public paratransit programs in the country. Started in 1979, ACCESS Transportation Systems, Inc. (a contractor to the Port Authority of Allegheny County, the local transit authority) brokers paratransit transportation services in Allegheny County, Pennsylvania (which includes the city of Pittsburgh). ACCESS is open to the general public, but it primarily serves persons with disabilities, clients of human service agencies, and older persons. Trips are provided through contracts with eight for-profit and nonprofit authorized carriers chosen through competitive bidding. For FY 2001, ACCESS had 121 local sponsors; nearly all of the human service agencies and organizations that fund or provide transportation in the Pittsburgh area now voluntarily contract with ACCESS for trips for their clients. ACCESS provides its third-party human service agency sponsors (such as the Area Agency on Aging and the Medicaid program) with a wide variety of services, including eligibility screening, trip monitoring, and invoicing. In FY 2001, 6 for-profit transportation companies and 2 nonprofit human service agencies, operating from 13 distinct facilities, provided ACCESS-administered services. These carriers are responsible to ACCESS for providing service in designated service areas and for meeting service standards set forth in their contracts. Service assignments are not exclusive; in many of the more densely populated areas, consumers have a choice of service provider. In FY 2001, ACCESS incurred \$29.5 million in costs and provided 2.059 million trips (7,500 per day, a much higher figure than pre-ACCESS operations). They generated an estimated cost savings of nearly 50%; in FY 2001, cost savings were estimated at \$26.1 million. ACCESS has reduced number of transportation providers from 121 to 16, increased on-time performance and reduced complaint levels.

Regional Transportation Coordination

The Suburban Mobility Authority for Regional Transportation (SMART) is the suburban transit operator for three counties in southeast Michigan, covering a service area of 1,200 square miles. SMART operates 419 vehicles in fixed route and paratransit service, taking people to and from Detroit to Wayne, Oakland, and Macomb counties. In

addition, SMART helps fund coordinated transportation services operated by 50 local communities with an additional 137 vehicles, which primarily serve people who are elderly or disabled. (Service within the City of Detroit is provided by a separate system funded and operated by the city's Department of Transportation.) The 50 local transportation services belong to SMART's Community Partnership Program. SMART coordinates with the communities by giving them local property taxes earmarked for transit and a percentage of the federal dollars SMART receives. Its three ombudsmen develop unique plans with each community. SMART's paratransit vehicles and the vehicles operated by the Community Partnership Program make about the same number of trips per day — 2,000 daily trips in each system. Therefore, the Community Partnership Program has allowed SMART to double the mobility of riders in its three-county service area. SMART now uses more than 600 buses and provides 11 million rides per year, an all-time high, and is setting records in every sector of their business. The system has also become a model for other transit systems looking to make big changes.

Through SMART's Community Partnership Program, SMART decentralized that which could be provided most effectively by the communities and centralized what SMART could do best. This helped improve service at the local level without spending more money. In 2002, the cost of the Community Partnership Program was \$7 million. Without this program, the services operated by SMART would have cost an additional \$2.7 million, for a total cost of \$9.7 million. Figures for later years are not available at this time but are expected to show even greater savings.

Services Provided by Volunteers

Because labor costs typically constitute the largest portion of the total costs of any transportation service, volunteers can add to the cost-effectiveness of an operation because volunteers are typically receive no payment for their time but may be reimbursed for their expenses, usually on a per-mile basis. While many people would like to "help a neighbor" anyway, they are generally much more willing to provide trips to someone in need if they are reimbursed for their vehicle expenses. But some volunteers will refuse all payments; they offer their services simply because they enjoy helping others.

Volunteers can increase a transportation program's cost-effectiveness by taking on some of the most labor-intensive tasks. This could include serving as drivers for long-distance trips, serving as drivers and/or escorts for persons who need hands-on door-through-door services, or providing service to areas or persons that are hard to serve through other transportation modes. Any cost-effective program that serves the widest variety of travel needs will need to include some kinds of services provided by volunteers.

Ride Connection in Portland, Oregon, is a nonprofit community organization that has been coordinating community agencies that provide rides for persons with disabilities and senior citizens without alternative transportation since 1988. Their service area includes 1.5 million persons in 3,000 square miles in three counties in Oregon and part of one county in Washington. Their service area includes urban, suburban, and rural

communities. They describe their mission as “linking accessible, responsive transportation with community need.” Operating in close collaboration with Tri-Met, the local public transit authority, Ride Connection has helped Tri-Met reduce its ADA paratransit costs. Ride Connection’s current roster of 401 volunteers and 268 paid drivers provides 300,000 annual trips at a total annual budget of \$5.2 million. Among volunteer programs that are closely allied with public transportation providers, Ride Connection is probably the largest in the country. Ride Connection functions as a human service transportation brokerage for many local agencies, including 3 Area Agencies on Aging. It provides trips to more than 6,000 persons who would not otherwise be able to travel. It also provides cost savings of about \$2 million per year just to public transit; other agencies also experience cost savings.

Taxi-assisted ADA Paratransit Services

In a number of communities around the country, privately-owned taxi companies operate under contract to transit authorities to provide some of the transportation services mandated under the Americans with Disabilities Act. Contracts with taxi operators may be beneficial for transit operators seeking to add flexibility to their ADA operations, to save costs, to provide trips at certain times or to certain communities, and to handle cyclical demands at peak daily periods, special events, or seasonal fluctuations.

Denver’s Regional Transportation District (RTD) is the public transportation provider for 40 cities and towns in all or portions of 8 counties around Denver. The service area population is more than 2.5 million persons located in 2,327 square miles.³ More than 86 million riders used RTD’s services in 2005; the 2006 operating budget is \$393 million and average weekday boardings are now 290,000. RTD’s **User-Side Subsidy Taxi Program** is designed as an alternative to RTD-provided ADA paratransit services, which in 2005 cost RTD \$36.77 per trip in subsidy. In 2005, under the user-side taxi subsidy program, the rider paid the first \$2.00, the RTD paid the next \$7.00, and the rider paid any fare over \$9.00. (In January 2008, RTD’s payment increased to \$12 per ride.) In 2005, approximately 49,800 rides were made as part of this program at a cost to RTD of \$348,600. If these rides had been taken on RTD’s Access-a-ride service, the cost to RTD would have been \$1,831,146. Thus, this program saved RTD \$1,482,546 in 2005. Greater savings are expected in future years.

Carpools and Vanpools

Carpools and vanpools are similar methods of sharing rides. A primary component of these options is that the passengers typically are interested in traveling to the same (or

³ *Regional Transportation District Denver Colorado: Audited Financial Statements Fiscal Year Ended December 31, 2004 and 2003*, RTD Administration Department, Denver. May 2005. Accessed at <http://www.rtd-denver.com/>

nearly the same) destination as the driver. Passengers generally share the travel costs with the driver, and the trip can become a venue for socialization.

The NuRide program, self-described as an “incentive-based on-line ridesharing community,” started as a means of encouraging work trip commuters to share rides and thus reduce traffic congestion and environmental pollution. It currently operates in the New York metropolitan area and Connecticut, around Washington, DC, and in the Minneapolis/St. Paul area, Houston, and Hampton Roads, Virginia. The NuRide program is different from other carpool or vanpool programs in that it does not require a regular commitment to sharing rides: rides may be obtained on a one-by-one basis. NuRide also involves rewards from local and national sponsors through a trip-based point system. Points earned by sharing rides may be redeemed for gifts, merchant discounts, tickets, or other items. It has been likened to the frequent flyer programs run by airlines. NuRide is free to join and use: its costs are paid for by its sponsors, who are governments, businesses, and employers. Merchant sponsors are willing to provide funding for NuRide because they believe that it offers a cost-effective means of directly connecting with potential customers. A key stipulation of the program is that members must possess an email account that identifies them as affiliated with a specific organization, such as a government agency, business, or employer. While this program has not yet been applied to population groups with special needs -- seniors, persons with disabilities, and low income persons -- the basic concepts of ridesharing and sponsors promoting social benefits and business interests are exciting. Further information on NuRide can be found at www.NuRide.com.

The Independent Transportation Network

A specific requirement of this memorandum is that it evaluate the Independent Transportation Network model (headquartered in Portland, Maine) and investigate the appropriateness of that model as a possible way to expand and finance transportation options to Miami Valley area seniors, especially where significant gaps exist in suburban and rural sections of the Region. Therefore, this memorandum includes specific recommendations regarding the suitability of the ITN model to the Miami Valley Region and whether or not it should be a priority in the regional coordination plan.

Description

The Independent Transportation Network (ITN, now marketed as ITN*America*TM) is arguably one of the most innovative transportation programs now operating. Started by Katherine Freund in 1995 in Portland, Maine, the original Portland ITN has been “replicated” in a variety of locations around the U.S., including Charleston (South Carolina), Chicago, Enfield (Connecticut), Lexington (Kentucky) Los Angeles, Orlando, San Diego, and Santa Monica. Current ITN*America*TM plans call for the initiation of operations at 10 new sites for each of the next 3 years. Discussions concerning the operation of “an ITN replication” in the Dayton area have been going on for several years.

ITN is a non-profit membership organization that uses automobiles (and no other kinds of vehicles) driven by paid staff and trained volunteer drivers. ITN offers demand-responsive services to persons 60 years of age and older and persons with visual impairments. Its stated objectives include helping seniors maintain their mobility, dignity, and independence without compromising safety. Services are available to members 24 hours a day, 7 days a week, and 365 days a year from any origin to any destination, for any purpose, within the service area. Door-to-door service is standard; door-through-door service and hands-on assistance are provided as needed.

ITN affiliates strive to achieve financial viability through a combination of fares and donations, and do not accept government funds. Corporate sponsorships and community donations are actively sought to cover that portion of a program's operating costs that are not covered by fares.

Potential riders must join ITN as members; individual prepaid accounts are established for each rider. Monthly statements for each member show deductions from the member's account for the costs of trips taken that month. The types of trips offered include regular service, errand service, and night rides. Fares are charged on a per-mile basis. Regular service applies to individual trips scheduled on demand; more immediate reservations require higher fares; shared rides and rides booked days in advance are charged discounted fares. Errand service, billed on an hourly basis, is designed for a sequence of short stops, such as errands to the bank, drugstore, and hardware store. Night rides, those after 9:00 p.m. and before 7 a.m., require a premium fare.

ITN includes a variety of innovative payment plans: trip cost sharing by merchants visited by the riders, trip cost sharing by professionals visited by the riders, an auto trade-in program whereby program participants can donate their cars to the program in exchange for trips equal to the total value of the car, gift programs through which children, friends, and others can provide rides for older persons with gift certificates, transportation credits for volunteer services, and discounted trips for frequent riders. There is a fund for low-income riders who cannot afford to pay full fare.

A key feature of ITN's services is its emphasis on customer service. ITN offers a broad range of demand-responsive services with a high level of consumer choice regarding service levels, trip costs, and payment options. The program emphasizes the dignity and desires of the participants. Further information about ITN can be found at www.itnamerica.org.

Advantages and Disadvantages for the Miami Valley Region

The ITNAmerica™ program offers a number of advantages for seniors in the Miami Valley region:

- It is highly customer-oriented and has a very strong record of customer satisfaction. Its members are proud of the organization and the services they receive.

- It can be considered to be a “prepackaged solution.” if a community wishes to sponsor an ITN replication, it purchases instructional materials, consulting services, software, and training materials to replicate the ITN Portland model.
- It does not depend on tax revenues for financial support; it does enlist local businesses and community organizations as supporters.
- Adult children living outside of the Miami Valley region can support the travel needs of their relatives living in the Miami Valley.
- ITN members living in the Miami Valley region could receive trips from other ITN affiliates in other parts of the U.S., and vice versa.
- It keeps seniors mobile and engaged in the community’s social and economic life after they have ceased to drive themselves.

The ITN program has a number of features that could be seen as disadvantages in terms of its application in the Miami Valley region:

- ITN’s focus on seniors and persons with visual disabilities omits a number of population groups that are important to the Miami Valley regional planning process: younger persons with disabilities and low income persons. The MVRPC plan needs to incorporate JARC and New Freedom program recipients.
- While seniors in the Miami Valley region certainly could use additional travel resources, they currently possess more extensive travel options than some of the other groups in need of more transportation.
- The lack of acceptance of governmental funding eliminates a potentially significant source of funds and makes the challenge of raising sufficient funding even greater.
- It will need to compete with other agencies for volunteers within a limited pool of volunteers.
- Their exclusive use of autos means that they cannot transport individuals with certain kinds of disabilities.
- Neither their vehicles nor their dispatching operations would be open to serving other (non-member) riders.

Overall, the ITN model could be applied as an independent, free standing “parallel structure” to the coordinated operations envisioned by the regional coordinated transportation Action Plan: it could provide for some of the local transportation needs while other transportation providers serve other persons and other needs. An ITN replication would provide an independent, not integrated, travel option in the Miami Valley region.

RECOMMENDED TRANSPORTATION OPTIONS

The kinds of overall transportation options that were considered for the Miami Valley region included:

- No change in current services or operations

- A new central travel information source
- A central trip planner / trip broker
- Coordination of transportation administration and operations
- Adding new transportation services
- Consolidating transportation services.

Transportation options workshops were a key component of community outreach for developing the regional coordinated transportation plan. County-level workshops were held to provide stakeholders the opportunity to consider a range of transportation coordination alternatives for improving the management and delivery of transportation services in their county. These half-day workshops were held during the week of November 12, 2007.

The overall results of the transportation options workshops were as follows. In **Greene County**, the preferred options were to:

- Add new services, and
- Create a centralized trip planner / broker.

In **Miami County**, the preferred options were to:

- Coordinate administrative and operational functions, and
- Consolidate services under one operator.

In **Montgomery County**, the preferred options were to:

- Create a centralized trip planner / broker,
- Coordinate administrative and operational functions, and
- Create a central information resource.

SPECIFIC TRANSPORTATION IMPROVEMENTS

The following specific activities were recommended as keys to the success of the implementation of the coordinated transportation services Action Plan in the Miami Valley region:

- Provide coordinated travel information.
- Support existing service providers who provide services in accordance with this coordinated transportation plan by, for example
 - Assistance in acquiring vehicles
 - Providing administrative and non-operating assistance

- Offering maintenance services to smaller operators.
- Connect public transit services with each other, perhaps by using common fare media, coordinated scheduling, cost sharing, and other techniques.
- Execute agency coordination agreements.
- Offer taxi subsidy options for some Project Mobility trips.
- Evaluate expanded use of the private sector.
- Provide community-oriented volunteer transportation services.
- Offer vanpools for work and other trips.
- Expand current public transportation services.
- Broker transportation operations.
- Seek additional local funding support for transportation from Federal, state, local, and private sources.
- Offer multi-county transportation services.
- Coordinate transportation services on a regional basis.

SUMMARY

Significant transportation innovations can offer new ways of conceptualizing and providing transportation services and will involve reconfigured operations and services. Potential innovations are possible in terms of information, vehicles, management, services, payment systems, and cost controls. The innovations will most likely include an increased customer orientation, more consumer choice, administrative changes, new fare strategies, and technological improvements. By applying such innovations, a wide variety of services could be matched closely to the individual needs of individual travelers, with people of the highest level of independence served by the least tailored services and people with specialized needs served by the most specialized transportation services.

To the extent that all of these services could be managed and coordinated by one central office, the chances for high-quality, cost-effective operations rise dramatically. Important features of this concept are that all significant transportation providers work together as partners, that many choices for travel exist, and that differing levels of service can match the specific needs of particular people or individual trips.

The immediate kinds of innovations that are needed in the Miami Valley region include

- Coordinated travel information
- An enhanced commitment to serving the unmet travel demands of special population groups and the general public
- Connecting the services of the existing public transit services in order to offer public transit trips that can cross county boundaries
- Interagency coordination agreements
- Community-oriented volunteer transportation services

- Carpools, vanpools, and other shared ride services for work and other trips
- Expanded travel services
- Additional local funding support
- A regional perspective that supports coordinated multi-county transportation services.