Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Final Report

Prepared for

Westchester County Department of Public Works and Transportation

Prepared by

Howard/Stein-Hudson Associates, Inc.
TranSystems Corporation

March 2011

Technical Report Documentation Page

1. Report No.	2. Government Accession No.	3. Recipient's Catalog No.

4. Title and Subtitle	5. Report Date
Design of a Demand - Responsive Mobility Management System for Northeast Westchester County	March 2011
	6. Performing Organization Code
7. Author(s)	8. Performing Organization Report No.
TranSystems Corporation with Howard/Stein-Hudson Associates, Inc.	
9. Performing Organization Name and Address	10. Work Unit No. (TRAIS)
TranSystems Corporation 38 Chauncy Street – Suite 200 Boston, MA 02111	11. Contract or Grant No. FTA NY-80X017, FTA NY-80X018 FHWA 7007043, FHWA 7007044
12. Sponsoring Agency Name and Address	13. Type of Report and Period Covered
Westchester County Department of Public Works and Transportation 100 East First Street Mount Vernon, New York 10550	14. Sponsoring Agency Code 1803

15. Supplementary Notes

16. Abstract

Northeast Westchester County, an area that is largely rural and suburban and minimally served by fixed-route transit, poses mobility challenges for the target populations that were the focus of this study: senior citizens, disabled individuals and home healthcare workers serving the area. The northeast municipalities of Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, Somers and Mount Kisco comprised the study area.

A coordinated transportation planning approach was utilized to design a Demand Responsive - Mobility Management System. Components of the design include the following:

- a Call Center offering a centralized location for residents of, and agencies operating in, northeast Westchester
- a broad-based coordination and development effort through a new Northeast Mobility Advisory Council and four smaller working groups focusing on volunteer driver programs, home healthcare worker transportation, municipal transportation and transportation vouchers.

Four technical memoranda as well as implementation, financial and marketing plans are included in the study report.

17. Key Word	18. Distribution Statement
Demand Responsive Transportation, Mobility Management, Coordinated Transportation	Virginia E. Johnson Westchester County Department of Public Works and Transportation 100 East First Street Mount Vernon, New York 10550

19. Security Classif. (of this report)	20. Security Classif. (of this page)	21. No. of Pages	22. Price
Unclassified	Unclassified	263	Free

Form DOT F 1700.7 (8-72) Reproduction of completed page authorized

Federal Disclaimer

The preparation of this report has been financed through the U.S. Department of Transportation's Federal Transit Administration and Federal Highway Administration. This document is disseminated under the sponsorship of the Westchester County Department of Public Works and Transportation in the interest of information exchange. The contents of this report reflect the views of the authors who are responsible for the facts and accuracy of the data presented herein. The contents do not necessarily reflect the official views or policies of the Federal Transit Administration, Federal Highway Administration or the State of New York. This report does not constitute a standard, specification or regulation.

This report, "Design of a Demand-Responsive Mobility Management System for Northeast Westchester," was funded through the New York Metropolitan Transportation Council project, Demand Responsive Service Analysis (PTWS10D00.H01). This project was funded through matching grants from the Federal Transit Administration (NY-80X017 and NY-80X018), and from the Federal Highway Administration (7007043 and 7007044).

Introduction

This study, which resulted in the design of a Demand-Responsive Mobility Management System for Northeast Westchester, is intended to help address the mobility needs of resident older adults and persons with disabilities, as well as home health care workers serving this largely rural and suburban area of Westchester County. The municipalities of Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, Somers and Mount Kisco comprised the study area.

The study was managed by the Westchester County Department of Public Works and Transportation, with significant assistance provided by the Westchester County Department of Senior Programs and Services (WCDSPS). Two not-for-profit organizations active in WCDSPS' Livable Communities Program have been involved throughout the study. A federal Job Access and Reverse Commute/New Freedom grant for implementation of the study's design was secured during 2010. Family Services of Westchester, Inc. a private, not-for-profit, non-sectarian agency, will be using this funding to implement the Demand-Responsive Mobility Management System in Northeast Westchester.

During the course of the study, the effort was enriched by the guidance of a Steering Committee and input from an Advisory Council. In addition, meetings were held in order to gain the critical input of key stakeholders and organizations involved in the care and transport of the target populations in Northeast Westchester County. Summaries of many of these meetings can be found in Technical Memoranda #2/3 and #4, both of which are in the appendix to this final report.

The study was conducted by the TranSystems Corporation and Howard/Stein-Hudson Associates, Inc. TranSystems took the lead on producing Technical Memoranda #1 and #2/3, while Howard/Stein-Hudson took the lead in producing Technical Memorandum #4, as well as the Implementation, Financial, and Marketing/Education Plans. Russell Thatcher served as Principal in Charge for TranSystems and Patricia Monahan was TranSystems' project manager. For Howard/Stein-Hudson Associates, Arnold Bloch served as Principal in Charge, with Scott Giering serving as project manager.

Format of the Final Report

This Final Report contains the following documents that were submitted to the Westchester Department of Public Works and Transportation during the course of the study:

- Implementation Plan (including an Appendix A: Three Call Center Case Studies) – Submitted February 2011
- Financial Plan (including an Appendix A: Preliminary Proposed Scope and Budget from RTM Designs for Call Center Setup, Operation, and Training; and Appendix B: Potential Funding Sources) – Submitted February 2011
- Marketing/Education Plan – Submitted February 2011
- Appendix 1: Technical Memorandum #1, Demographic Analysis and Inventory of Transportation Services – Submitted May 2010
- Appendix 2: Combined Technical Memorandum #2 & 3, Service Design Alternatives and Preferred Alternatives – Submitted May 2010
- Appendix 3: Technical Memorandum #4, Detailed Vision for a Mobility Management System – Submitted October 2010

Implementation Plan

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Prepared for
Westchester County Department of Public Works and Transportation

Prepared by
Howard/Stein-Hudson Associates, Inc.

February 2011

Howard/Stein-Hudson Associates, Inc.
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Part 1 - Introduction

In late 2009, the Westchester Department of Transportation (WCDOT)[1], in coordination with the Westchester County Department of Senior Programs and Services (WCDSPS) and a project Steering Committee, and with the assistance of this consultant team, embarked on an effort to design a demand-responsive mobility management system for seven communities of Northeast Westchester. These communities are Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, Somers, and the Village and Town of Mount Kisco. The purpose was to address the mobility needs of three target populations: older adults, persons with disabilities, and individuals with low incomes (particularly home health care workers).

Between December 2009 and December 2010, the study team met with the project Steering Committee and an Advisory Council on numerous occasions. In addition, stakeholder working group sessions were held in the spring and early summer of 2010. Based on these meetings, as well as on work conducted by the consultant team, WCDOT and other entities, a vision for a Mobility Management System was developed. Technical Memorandum #4 contains the detailed vision for this system.

This Implementation Plan covers the three critical aspects of the Mobility Management System to help guide its development:

- A Call Center, which will offer a centralized location for residents of, and agencies operating in, Northeast Westchester to access transportation information.
- A broad-based coordination effort through a new Northeast Westchester Mobility Advisory Council (the Advisory Council) that will bring together the disparate agencies, municipalities, private for-profit and not-for-profit organizations that have a vested interest in mobility in Northeast Westchester. The Advisory Council will work collaboratively to identify areas of potential cooperation and coordination of services to provide better mobility for the residents of Northeast Westchester, while maximizing the efficient use of limited financial resources. Smaller working groups, focusing on specific topic areas such as volunteer ride programs, home healthcare worker transportation, municipal transportation, and transportation vouchers will provide a forum for more detailed discussion and exploration of specific coordination ideas.
- Transportation voucher programs that will allow sponsoring agencies to augment transportation options by subsidizing rides via available transportation services in Northeast Westchester.

The plan presented in this document is meant to provide guidance on how to implement the system as developed and described in Technical Memoranda 1 through 4 and to satisfy commitments made for the JARC/New Freedom grant that will fund this effort over the next three years. This plan is divided into six sections. Part 1 provides a general introduction to the Implementation Plan. Part 2 explains the goals and objectives of the Mobility Management System. Part 3 provides the key steps needed to implement the system. Primary tasks and sub-tasks are identified and explained for each of the major components of the Mobility Management System. Part 4 shows a graphic timeline for the anticipated implementation of each component. Part 5 is a staffing plan that notes the anticipated staff, approximate time of hire, full-time equivalence, job functions and responsibilities, and a graphical illustration of expected time and duration of major job functions. Finally, Part 6 lists toolkits, case

[1] Currently the Westchester Department of Public Works and Transportation, effective January 1, 2011

studies, and other resources that will assist the Mobility Management Team in implementing the new system for Northeast Westchester.

Part 2 - Goals and Objectives

The Mobility Management System for Northeast Westchester has two primary goals:

Goal 1:
The Mobility Management System will be a transportation resource and information center for the public, transportation providers, businesses, and agencies living, working or operating in Northeast Westchester.

Successful attainment of this goal will also require the fulfillment of a unique set of objectives including:

- Developing and maintaining a database of transportation information.
- Establishing a transportation Call Center for Northeast Westchester.
- Designing and implementing a web portal for online access to the Call Center database.
- Researching and reporting on critical issues related to the Call Center activities.

Goal 2:
The Mobility Management System will increase mobility options for seniors, the disabled and home health care workers who live or work in Northeast Westchester.

Attainment of this goal will require the fulfillment of several objectives including:

- Facilitating coordination of transportation services among providers in Northeast Westchester.
- Identifying opportunities to enhance coordination and deepen relationships among transportation providers to increase mobility options.
- Promoting volunteerism and supporting volunteer driver programs in Northeast Westchester.
- Facilitating the implementation of transportation voucher programs between agencies or other organizations and private transportation operators.

The remainder of the document will provide guidance on how to fulfill the objectives and attain the desired outcomes for the Mobility Management System.

Part 3 – Implementation Plan

A. Call Center

The Call Center envisioned for Northeast Westchester may, over time, incorporate many of the typical elements of a mobility management "One-Stop" center that operates in many settings throughout the country. Initially, however, its role will be to provide information about non-emergency transportation via both a centralized call center and the Internet to residents, workers, and agencies in Northeast Westchester. See Technical Memorandum #4 for a detailed description of the Call Center function and services.

Task 1 - Finalize Call Center Functions and Policies

This design study identified the preliminary functions of the Call Center as providing non-emergency transportation information to residents of Northeast Westchester in order to assist them in determining appropriate transportation options to meet their specific mobility needs. This service will be available via a direct phone call to the Call Center or via a Web-based information portal.

Sub-tasks

1. *Develop policies that cover the specifics of how the system will be used and maintained.* Before moving into the physical design and implementation of the Call Center, several policies need to be developed. The following types of policies should be considered:
   - A privacy policy that explains what personal data will be collected about callers, how it will be collected, how it will be stored, how it will be used as well as a caller's rights to opt-out of the data collection.
   - A call recording policy that explicitly states that the Call Center may record calls for quality and training purposes. This policy will also describe how calls will be recorded, the length of time recordings will be kept, how and where they recordings will be stored, and the process for accessing the recordings.
   - An emergency call policy that explains how the Call Center operators will handle emergency calls. At a minimum, this should state that users who call the Call Center will hear an initial greeting that says to hang up and dial 911 if the call is an emergency. The policy should also address how the Mobility Managers will handle emergency calls if the caller manages to connect directly with the Call Center staff.
   - A referral policy that explains how Call Center operators will refer callers to transportation providers. This will be particularly important for how private operators are handled. For example, whether callers will be given contact information for every taxi company serving the area or the closest one to the caller.
   - An access policy that will clarify who has access (and level of access) to Call Center data. This policy will clarify what information will be available to the public and what information will be available to agencies and stakeholders. It will also indicate who will have access to add, update, and delete information.

- A data collection policy that will identify where, how, how often, from whom, and what information about transportation services will be collected. The specifics may differ between providers.

  The Alliance of Information and Referral Systems (AIRS) "Standards for Professional Information & Referral and Quality Indicators" (link provided in resources section) will provide additional guidance on how to develop supportive policies for the Call Center.

2. *Finalize the functions of the Call Center*
   The final functions identified in the design study should be vetted through the Advisory Council including:
   - Role of the Call Center - currently to provide information and refer callers to transportation providers. This could be expanded in the future to offer reservations and/or trip scheduling (see Future Possibilities for more details).
   - Hours of operations – 9 am to 5 pm, Monday to Friday is currently recommended to be to test demand for the system. These hours could be increased to 7 am to 6 pm and include Saturdays to capture additional inquiries.
   - Methods of providing information – currently recommended as a toll-free telephone number and over the Internet. Other future options include a physical drop-in location where the public could get information about transportation services or a printed directory that could be distributed to key locations across the Northeast Westchester region.

Task 2 - Finalize Technology to be Used in the Call Center, Hire Staff, and Acquire Support Infrastructure

The technology needed to support the Call Center will depend on its final agreed-upon functions. As currently envisioned, the Call Center will have only modest technological needs including a communication system, database management system (DBMS), Website as well as office and administrative support infrastructure.

Sub-tasks

1. *Determine communication system to be used*
   Numerous providers offer business class phone and Internet service in Northeast Westchester including BNCVoice, Verizon, and Cablevision (Optimum Business). The Call Center will need:
   - Telephones
     - Up to seven (7) extensions with unlimited local and long-distance calling
     - Phone equipment for the Mobility Management Team
     - Voicemail
     - Auto-attendant capability
     - Conference call capability
   - Cell phone/smart phones/PDAs (up to 3)
     - For Project Director and Mobility Manager (and spare)
   - Broadband Internet connection (min 1.5 Mbps)
     - Best option: Business-class cable Internet service
     - Alternatives: DSL, fiber-optic (including T1)

2. *Determine software systems to be used*

Two options are presented here for the software and database systems needed to support the Call Center and online information portal. An "off-the-shelf" solution is recommended for ease of implementation, cost, and support options. However, if this proves inappropriate for the functions of the Call Center, details for a custom-built solution are also provided.

- Information & Referral software package (recommended): RTM Designs (http://www.refersoftware.com) has developed a suite of products designed specifically for organizations providing human service information and community assistance through call centers and the Internet. The company's ReferNET system includes comprehensive Call/Contact, client tracking, call data reporting, resource maintenance, and directory publication modules that can include transportation provider information. The system can provide both the Mobility Manager interface with the system as well as Internet access for the general public. This system has been successfully implemented by Mobility Management Call Centers in New York State including the Institute for Human Services Call Center in Steuben County (see provided case study).
- Custom built: A custom-built solution will require a database management system (DBMS) to store transportation information as well as a custom-built application for users to access that information and generate reports. The technology behind the DBMS will likely need to scale up over time as more information is added to the system and new functions are needed. While a simple database solution such as Microsoft Access or MySQL may be appropriate in the near term, Microsoft SQL Server will be a better choice in a custom-built scenario given that the Mobility Management Team host agency already uses this technology. This will offer more robust data storage and faster data processing over desktop systems and will take advantage of current capabilities and relationships with database management consultants. A sample of the type of data and data relationships that will be important are included in the table below: (←----→ = linkages between tables)

Caller Information	Call Log	Provider Information	Provider Services
Caller ID ←---------→	Caller ID	Provider ID ←--------→	Provider ID
Name	Date of Call	Organization	Service type
Address	Time of Call	Address	Types of trips provided
Eligibility	Purpose of call	Administrative Contact	Description of service
Special Needs	Date of trip	Scheduling Contact	Fares
Comments	Origin	Phone Number	Days of operation
Date Entered	Destination	Website	Hours of operation
Date Updated	Purpose of trip	Comments	Schedule/timetable
	Services requested	Date Entered	Locations served
	Eligibility criteria	Date Updated	Eligibility requirements
	Service options provided		Reservation requirements
	Special needs		Vehicle types
	Other information provided		Vehicle accessibility
	Comments		Driver training
	Level of caller satisfaction		Passenger assistance
			Date entered
			Date updated
			Next scheduled update

In a custom-built solution, the Web-based information portal should be hosted externally through a third-party Web hosting company. Companies such as InMotion.com or GoDaddy.com offer greater bandwidth, greater data security, and more robust back up and maintenance systems than could likely be achieved internally. In addition, external hosting of the Website will reduce the computer infrastructure requirements as a dedicated Web server would not be needed. Most hosting sites support either (or both) Active Server Pages (ASP) or PHP Hypertext Preprocessor (PHP) pages - the most common Website coding languages for interfacing with database systems. As with the design of the DBMS, consultants will likely be necessary to develop the Call Center Website and Web-based application that will interface with the DBMS. Functionality that will be needed includes:

- Public access to the information in the DBMS either via an online directory or through a series of queries that narrow the information presented.
- Mobility Management Team access to data in order to help callers identify transportation options, update and maintain data, extract and archive data, and generate reports.
- Agency/stakeholder access (if desired) to view and update provider information.

The custom- built option will include the following additional sub-tasks:

- Determine the need for consultant assistance.
- If needed, develop an RFP for consultant assistance.
- If needed, conduct a procurement process.

- The exact information to be stored and made accessible in the software systems will be finalized. However, once the appropriate solution is identified, several protocols will need to be developed and followed. These include:
  - Establishing protocols for collecting, entering, updating, and deleting information
  - Establishing protocols for accessing data (Mobility Management Team, transportation providers, stakeholders, and the public)
  - Establishing protocols for archiving information

3. *Hire staff and purchase necessary office and administrative support infrastructure:*
The Mobility Management Team will need a new staff position (Call Center Manager – see Staffing and Responsibilities under Part 4) as well as the following equipment, infrastructure, and software to support the Call Center:
   - Personal computers and/or laptops for Mobility Management team
     - Work stations (up to 3)
       - Call Center Manager
       - Call Center Operator
       - spare
     - Laptops (up to 3)
       - Project Director
       - Mobility Coordinator
       - Call Center Operator
   - Fax machine (1)
   - Copier/printer/scanner (1)
   - Central file server and data backup system (1)

- Software:
  - Microsoft Office Professional
  - Internet browser
  - ReferNET system (recommended)
  - Microsoft SQL Server license (for possible later custom-built database solution)

Task 3 - Implement Systems

Once the DMBS and Web applications have been developed, the Mobility Management team will implement the new systems.

Sub-tasks

1. *Populate the DBMS with detailed transportation provider information*
   This information will need to be collected directly from agencies, checked for accuracy, and updated on a regular basis.

2. *Systems training and education for*
   - Call Center operators and Mobility Management Team on
     - Use of the DBMS
     - Customer service
   - Agencies and the public on
     - Use of the Call Center
     - Use of the Call Center Website

3. *Testing the Call Center and its systems with a select group of users*
   This should include members from the Advisory Council as well as members of the public (potential users). Results of the testing should be analyzed and discussed with the Advisory Council to determine if any changes or adjustments are needed. If necessary, the Call Center should be re-tested.

Task 4 - Market the Call Center

Once the Call Center is ready for public use, its services will need to be marketed to the target audiences identified in the Marketing Plan. The Marketing Plan will provide guidance on how to effectively educate the public about the available services.

Task 5 - Launch and Early Evaluation of the Call Center

Simultaneous with the marketing effort, the Call Center should go "live" and begin accepting calls from the public. Initially the Call Center should operate from 9 am to 5 pm, Monday to Friday. During off-hours callers will be able to leave a message in the Call Center voicemail system and receive a call back from a Call Center operator the following week day. Once the Call Center has been launched, the Mobility Management Team will need to begin a continuous process of evaluation.

Sub-tasks

1. *Evaluate the Call Center's development by surveying Advisory Council members about the process of working with the Mobility Management Team.*

2. *Evaluate the performance of the Call Center and Website and make adjustments as necessary by monitoring and reporting on:*
    - Call volume
    - Call times
    - Website usage
    - Types of services requested (via telephone and Internet)
    - Type of information provided
    - Demographics of users
    - Public vs. stakeholder usage
    - User satisfaction and suggestions for improvements

3. *Document the Call Center development process and evaluation results.*

Task 6 – Monitor Call Center Usage

Monthly reports generated from the DBMS will provide a snap shot of Call Center usage and allow the Mobility Management Team to adjust infrastructure and staffing as needed. The reports should include:

- Peak times for calls
- Calls received after hours
- Website usage
- Geographic areas service
- Types of users served
- Type and frequency of information requested
- Type of information provided
- Average call duration

Task 7 – Evaluate Call Center Development and Use

The Mobility Management Team will continuously evaluate the performance of the Call Center.

Sub-tasks

1. *Monitoring and recording of calls for training and liability purposes.*

2. *Surveying users and stakeholders to get feedback on Call Center activities.*

Task 8 - Identify Next Steps and New Services for the Call Center

As the Call Center operations evolve, the Mobility Management Team will identify areas of potential growth and necessary changes to Call Center activities. New features will be identified through discussions with the Advisory Council as well as direct feedback from the public and integrated into the Call Center as appropriate.

Future Options

While not envisioned in the initial implementation of the Call Center, there are several possibilities for future activities to be undertaken by the Call Center. Some will require only modest changes in operation or infrastructure, while others will require significant and expensive upgrades. Some of these possibilities are explained briefly below:

Direct call transfers to transportation providers – This would allow Mobility Managers to connect callers directly with the transportation provider that best meets the needs of the caller. This would save the user from having to make a separate call. This transfer could happen in one of two ways:

- An Attended Call Transfer would allow the Mobility Manager to speak directly with a representative at the transportation provider before connecting the caller.
- A Blind Call Transfer would allow the Mobility Manager to transfer a call to a third party, without the need to speak to the transportation provider before the transfer.

Providing this service would require the following upgrades:

- Additional phone lines if the transferred call does not release the current circuit.
- Upgraded phone equipment and telephone service capable of handling third-party transfers.

Interactive Voice Response (IVR) system – An IVR system creates a computer-user interface via a telephone that is capable of detecting and understanding a caller's voice and keypad inputs. This would allow callers to access the Mobility Management database via keyed or spoken response to a series of prompts. The IVR will query the DBMS based on the inputs provided, match the caller's needs with appropriate transportation options and relay that information to the caller through text-to-speech technology. This would allow users (at their discretion) to access a completely automated system allowing Call Center operators more time to address the needs of other callers. It would also allow the Call Center to provide services during non-business hours.

Providing this service would require:

- Purchase and integration of an IVR system from a vendor such as ShoreTel or Avaya.

Travel training - Travel Training is short-term, comprehensive, intensive, specially designed instruction to teach individuals how to travel safely and independently on public transportation, where appropriate.

Ride status and tracking – Though this is often achieved using automated vehicle location (AVL) systems that provide real-time information about vehicles, the Call Center could provide basic ride status and tracking information to callers by having the Mobility Management Team contact the provider, checking the ride status, and relaying that information to the caller.

Providing this service would require the following changes and upgrades:

- Potentially additional Call Center operators as calls could take longer to complete.
- As call duration increases, additional phone lines may also be needed.

Real-time vehicle locating and tracking would require a significant investment in new technology and infrastructure including:

- An AVL system installed on all vehicles covered by the Mobility Management System to track vehicles in real-time.
- A two-way messaging system to communicate with directly drivers in the field.

Reservations, scheduling, and dispatching – While the current vision of the Call Center is as a central repository of transportation information, in many Mobility Management Systems across the U.S. the function of these Call Centers is more substantial, including coordinated reservations, scheduling, and dispatching functions. Four typical options are presented below in order of increasing coordination between transportation providers:

- Coordinated communication: Reservations, scheduling and dispatching are operated independently by the various transportation providers but are linked by a coordinated communications system and shared reservations/scheduling system.
- Centralized reservations: Reservations and scheduling for several providers are centralized in the Call Center but the service remains independent.
- Transportation broker: Reservations and scheduling are centralized in the Call Center and the Mobility Management Team books each trip with the provider that is most appropriate for the customer. Available seats on other providers' vehicles may be utilized when necessary.
- Service provider: Reservations and scheduling are centralized in the Call Center and vehicle fleets are combined.

These types of services would require:

- An AVL system
- New reservation and scheduling software

B. Coordination, support, and growth of current activities

Overall coordination between the multitude of public, private, not-for-profit, and volunteer transportation providers in Northeast Westchester will be a critical function of the Mobility Management Team. The Team will act as facilitators for on-going coordination between all of the various interests and organizations involved with the transportation needs of older adults and persons with disabilities who reside in the Northeast area, as well as home health care workers traveling to the area. The overall objective of the coordination effort will be to establish a mechanism for routine meetings and discussions between providers that would seek ways to:

- Increase transportation availability for seniors, the disabled, and home health care workers in Northeast Westchester.
- Enhance the quality of existing services.
- Eliminate or reduce any duplications or redundancy in services.
- Improve the cost-effectiveness of transportation provision and maximize the use of resources.

Task 1 – Organize and Convene the Northeast Westchester Mobility Advisory Council

This Advisory Council will act as an advisory group and assist the Mobility Management Team in the implementation of the Call Center and other Mobility Management efforts. Its membership will consist of a select group of interested parties to be drawn from the following:

- Public transportation providers
- County human service agencies
- Private operators
- Volunteer ride programs
- For-profit and not-for-profit organizations
- Faith-based organizations
- MetroPool
- Local elected officials
- Local media
- Citizen representatives
- Westchester County Department of Public Works and Transportation

Sub-tasks

1. *Develop relationships with agencies and other entities that will be important members of the Advisory Council by setting up in-person meetings to:*
    - Explain the mission and goals of the Mobility Management effort.
    - Discuss and understand the challenges in providing transportation for the target populations and ideas for addressing those challenges.
    - Solicit ideas for possible areas of coordination among transportation services.
    - Personally invite each organization to participate in the Advisory Council.

2. *Organize the kickoff meeting of Northeast Westchester Mobility Advisory Council*
    - Set initial draft goals for the coordination effort.
    - Identify appropriate meeting locations.
    - Invite stakeholder to join the Advisory Council
        - Explain the purpose of Advisory Council (see Technical Memorandum #4).
        - Explain the responsibilities of, and expectations for, Advisory Council members (see Technical Memorandum #4).
        - Provide a draft agenda for the first meeting.
        - Ask for participants to RSVP and submit comments.
        - Conduct any follow-up needed on invitations.

3. *Facilitate and document the first Advisory Council meeting*
    - Major meeting activities should include:
        - Agree on meeting norms:
            - Expected frequency, length, and timing of meetings
            - Expected location(s) of meetings
            - Contact methods (e.g., letter, phone, email, etc.)
            - Setting agenda for future meetings
            - Conducting meetings: methods, presentations, Q&A, reaching consensus, etc.

        - Summary format and distribution
        - Other
    - Discuss goals of and vision for coordination effort
    - Prioritization of next steps
    - Identify outstanding issues and questions that need to be resolved
        - Assign responsibility for researching solutions to:
            - Mobility management team
            - Council members if appropriate
    - Next steps

4. *Evaluate the first meeting*
    - Did it meet expectations?
    - Was it productive?
    - How many entities participated?
    - Were key groups missing?
    - How well did the group work together?
    - Solicit feedback from Advisory Council members about how to improve the meeting process?

5. *Organize ongoing meetings of the Advisory Council to*
    - Continue to identify areas for possible coordination
        - Develop an action plan for addressing barriers to coordination.
    - Provide information on transportation services.
    - Assist with testing of Call Center.
    - Provide feedback on Call Center usage.
    - Suggest additional features and functions for the Call Center to be included over time.

Task 2 – Organize and Convene Working Groups

As a subset of the Advisory Council, the Mobility Management Team will set up working groups to continue to explore ways to coordinate and develop services. While groups identified below represent the focus areas of the design study, the Advisory Council may identify other areas that necessitate additional working groups to explore specific issues in depth. The full Advisory Council should also provide guidance on the prioritization of these working groups – if all should be convened immediately or if some are more critical than others.

<u>Volunteer Driver Program Working Group</u>

This working group comprised of the study area's ten volunteer ride program coordinators will:

- Share challenges, opportunities and experiences.
- Identify areas of possible mutual assistance including establishing an action plan for coordinated:
    - Driver recruitment, vetting, training, and recognition.
    - Pursuit of grant funds as a source of reimbursement for drivers.
    - Public information/education about volunteer driver programs.
- Identify support that the Mobility Management Team can offer such as:
    - Engaging assistance from the Volunteer Center and the Volunteer Unit of Family Services of Westchester.

    - Promoting volunteerism in Northeast Westchester.
    - Research on liability issues and supplemental insurance options for drivers.
- Discuss and develop options for future coordination and growth of services.

Home Health Care Worker Transportation Working Group

This working group comprised of representatives from home health care agencies will explore the possibility of providing coordinated transportation services by:

- Discussing the current transportation needs of, and transportation services provided by, home health care agencies.
- Identifying possible partnerships between two or more agencies to utilize excess capacity on agency vans.
- Facilitating meetings and negotiations between agencies to help them develop a formal transportation relationship where, for example, one agency pays for seats on another agency's van.
- Identifying future options for expanding partnerships to other home health care agencies, possibly including:
    - Identifying a single agency to operate transportation services on behalf of all of those who currently provide van service.
    - Joint contracts with private or non-profit transportation providers to operate services.

Municipal Transportation Services Working Group

This working group comprised of representatives of municipal transportation services and local elected officials will meet regularly to:

- Understand the transportation issues and challenges municipalities face.
- Discuss ideas for coordinating services, driver training, vehicle maintenance, purchasing, contracting, and grant applications.
- Discuss possibilities for jointly operating new routes or services.
- Learn about municipal service consolidation efforts in New York State and its applicability to Northeast Westchester.
- Learn about policy issues at the federal level for coordinating services that are federally funded.

Transportation Voucher Program Working Group

This working group will include transportation providers (such as taxi companies) operating in Northeast Westchester, as well as agencies and organizations interested in sponsoring a voucher program. The group will meet regularly to:

- Learn about transportation voucher programs including:
    - The different voucher program best practice models being used around the country
    - Their applicability to Westchester
    - Logistics of setting up a voucher program
    - Eligibility criteria
    - Financial subsidies
- Identify sponsors and providers interested in setting up a voucher program.
- Identify and address administrative challenges.
- Coordinate grant applications to subsidize the vouchers.
- Discuss ideas for publicizing voucher programs.
- Explore options for expanding voucher programs in Northeast Westchester.

It is expected that this working group will work to develop a voucher program, which is described in more detail below as the third component of Part 3.

Sub-tasks for each working group

1. *Develop goals for each working group*

2. *Organize first meeting for each group*
    - Identify coordination issues and challenges
    - Identify opportunities and possibilities for working together
    - Determine next steps and agree on an action plan
    - Assign responsibilities
    - Identify next meeting date

3. *Organize ongoing, regular meetings to identify and press forward on areas of common concern and priorities for group members.*

Task 3 - Develop Relationships with the Community

In order to better understand how the target populations use transportation services and the difficulties they encounter, the Mobility Management Team will meet with community members at:

- Senior centers/adult day care
- Active living centers
- Retirement communities
- Houses of worship
- Community centers

The Mobility Management Team will share information gathered during these meetings with the Advisory Council.

Task 4 – Evaluate and Document Coordination Effort

The Mobility Management Team will document its coordination efforts, noting successes, challenges, and lessons learned.

Sub-tasks

1. *Document meetings with organizations and of the Advisory Council and working groups.*

2. *Identify and document successes with coordination and describe specific results.*

3. *Identify and document coordination challenges and how they were overcome or efforts still underway to address these challenges.*

4. *Document "lessons learned" that will be helpful for other entities engaging in a multi-organization coordination effort.*

Task 5 – Coordinate Funding and Grant Opportunities

Beyond the Advisory Council and working groups, the Mobility Management Team will also identify and circulate information, as well as help coordinate funding opportunities available from federal, state, county, local, or private sources.

Sub-tasks

1. *Research funding opportunities for services and provide research updates to the Advisory Council. Determine eligibility requirements for new funding grants.*

2. *Identify specific organizations that could apply for grants and encourage partnerships among organizations for specific funding sources.*

3. *Provide advice and information to organizations on the preparation and submission of both individual and joint grant applications.*

C. Transportation Voucher Programs

The development and implementation of transportation voucher programs will offer a cost-effective, flexible way to expand mobility options in Northeast Westchester that also maximizes the use of existing transportation resources. Vouchers could be used to provide trips to clients' homes for home health care workers, or for general transportation needs that cannot be accommodated by other services. The programs would be open to any entity in Northeast Westchester wishing to participate. Individual agencies would be responsible for determining eligibility for vouchers and the amount of subsidy to be paid.

Task 1 - Indentify Voucher Sponsors and Providers

A transportation voucher program can be initiated by any local organization. The sponsors are those agencies that agree to provide vouchers covering at least a portion of the total cost of a trip for a client. The providers are those entities that agree to accept the vouchers as payment for the trips. Working through the Transportation Voucher Program Working Group, the Mobility Management Team will identify a single or a few organizations interested in sponsoring a voucher program as well as taxi companies or other transportation providers willing to accept vouchers. (A Google Site entitled Transportation Voucher Programs: Enhancing People's Connection to Employment and Other Quality of Life Destinations -- available at http://sites.google.com/site/voucherprogram/home-- provides a wealth of information, resources, case studies, and "how to" articles about setting up and funding a transportation voucher program.)

Task 2 - Identify Appropriate Voucher Model Based on the Specific Needs of the Sponsor and Provider

Once the sponsors and the providers have been identified, the Mobility Management Team will determine, through close coordination with the sponsor and provider, which model will work best for each entity looking to initiate a voucher program. There are currently two typical models being used throughout the country. The benefits and challenges of each are described briefly below. The resources section contains links to more detailed information about each as well as case study examples.

Checkbook model

The "checkbook" model, promoted by the Association for Programs for Rural Independent Living (APRIL), involves a printed checkbook with an allocation of miles or trips from a sponsoring agency. Customers use the checks to "pay" for rides with volunteers, transit agencies, taxis, or other transportation providers.

- Benefits:
    - Greatest consumer choice and control over transportation.
    - Easy for agencies to learn to use.
    - Consumers identify and enjoy the checkbook model.
    - Training manual for starting voucher program is available.
    - Tried successfully in other communities.
    - Works best when funding is provided by one or more funding sources.
    - Program is highly adaptable and flexible to local conditions.
    - Can be started with minimal investment.
- Challenges:
    - Customers who do not read or write need help to complete vouchers.
    - Duplicate checks can be written if people become confused or attempt to take advantage of the system.
    - Generates paper checks which must be stored and tracked.

I-voucher model

The "i-voucher" model, developed by the Great Plains Rural Initiative on Transportation (GRIT) and the North Dakota Center for Persons with Disabilities (NDCPD) at Minot State University, was primarily designed for a larger statewide program with multiple sources of funding. In this model, customers apply for eligibility for funded trips from the sponsoring agency and then either the customer would receive a voucher for the exact, pre-approved value of the trip or the agency would submit a ledger to the transportation provider. Each voucher contains information about destination, mileage, value, and documentation (e.g., driver's signature, rider data). The difference from the "checkbook" model is the use of a software system (iBUSS) which can coordinate communication and information exchange.

- Benefits:
    - Can be used by either new or experienced voucher program and is recommended for sites that have or are seeking multiple funding sources to support vouchers.
    - Offers consumers choice and control.
    - Allows multiple funding sources to set up, track and authorize rides and generate a need audit trail.
    - Software is easy to learn – online training is usually completed in four to six hours.
    - iBUSS software can automatically generate standard Medicaid forms.
- Challenges:
    - Consumer still must call a driver or transit agency to schedule ride.
    - Partners are required to work closely together during any initial start-up phases to understand roles and responsibilities and make decisions about rates.
    - Online training may not prepare the user to coordinate with multiple partners.
    - Bookkeeping features may not be compatible with systems already in use by a transit provider or service agency.

Task 3 - Facilitate Contract Negotiations between Sponsors and Providers

A voucher program formalizes a contractual relationship between the sponsoring agency (ies) and the transportation providers that clearly states details of that arrangement, including payment and reimbursement terms, hours of availability, service area, etc. The Mobility Management Team will facilitate discussions between sponsors and providers to agree upon:

- Standard fares
- Distance fares
- Multiple passenger discounts
- Peak/off-peak fares
- Invoicing and payment
- Distribution and collection of vouchers
- Scheduling of rides

Task 4 - Assist Sponsors with Setting up Their Voucher Program

Once a formal contract has been signed between a sponsoring agency and transportation providers, the Mobility Management Team will need to assist sponsors with the internal logistics of setting up the program. These logistics do not impact the contract with the providers and can happen before, concurrent with, or after negotiations with the providers. This will include:

- Assisting the agency in determining eligibility criteria for subsidized rides. The final decision will ultimately rest with the sponsoring agency but criteria may include:
    - Income level
    - Age
    - Disability
    - Type of trip needed/Trip purpose
- Determining the amount of subsidy to provide riders.
- Suggesting mechanisms to print, distribute, and collect vouchers.
- Resolving insurance issues (if any).

Task 5 - Assist with Voucher Program Marketing

Once a voucher program is ready for public use, it will need to be marketed to the target audiences identified by the sponsoring agency. The Marketing Plan will provide guidance on how to effectively educate the public about the available service.

Task 6 – Assist in Coordinating Funding

A transportation voucher program can provide a mechanism in which funding from multiple sources—federal, state, or local (e.g., county, city, employer)—can be combined to subsidize all or part of the cost of an eligible individual's trip. The Mobility Management Team will identify appropriate funding sources and provide information and data to sponsoring agencies as they prepare individual or joint grant applications. Specific programs and funding sources are provided in the Financial Plan.

Task 7 - Evaluate the Voucher Program

Once a transportation voucher program has been launched, the Mobility Management Team will need to begin a continuous process of evaluation.

Sub-tasks

1. *Evaluate the voucher program's development to identify what works and challenges that had to be overcome. Develop an ongoing list of "lessons learned" that can be applied to other entities wishing to initiate voucher programs in Northeast Westchester.*

2. *Evaluate the performance of the voucher programs and suggest adjustments as necessary through coordination with program sponsors:*
    - Number of riders
    - Number of trips provided or miles traveled
    - Origins and destinations
    - Types of trips provided
    - Total amount of subsidy provided
    - Overall cost to sponsoring agencies

Task 8 - Promote the Expansion of Voucher Programs to Other Entities

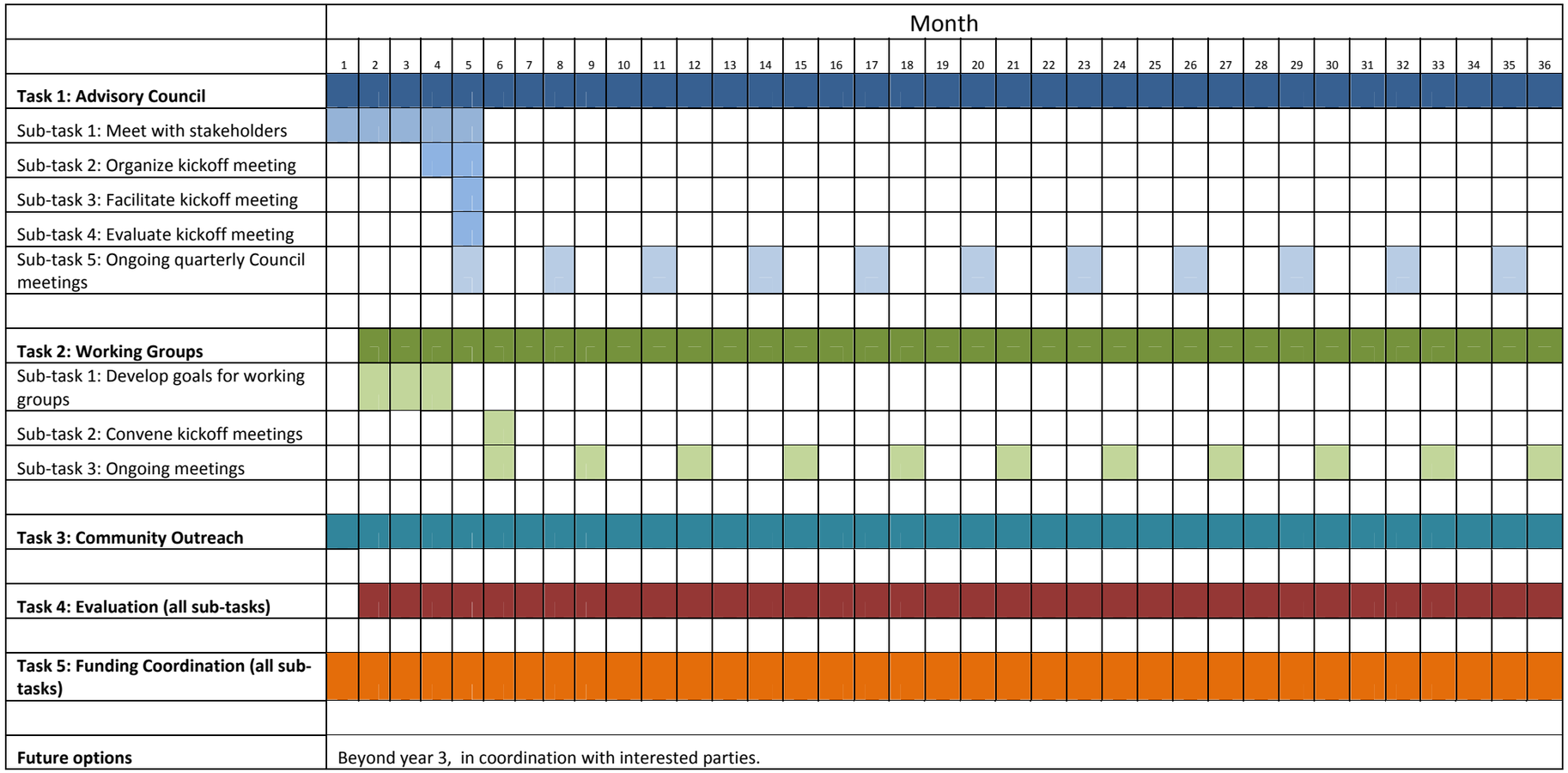
In the future, the Mobility Management Team can consider consolidating the voucher programs into a single entity with centralized administration and contracts.

Part 4 – Implementation Schedule (Begins February 2011)

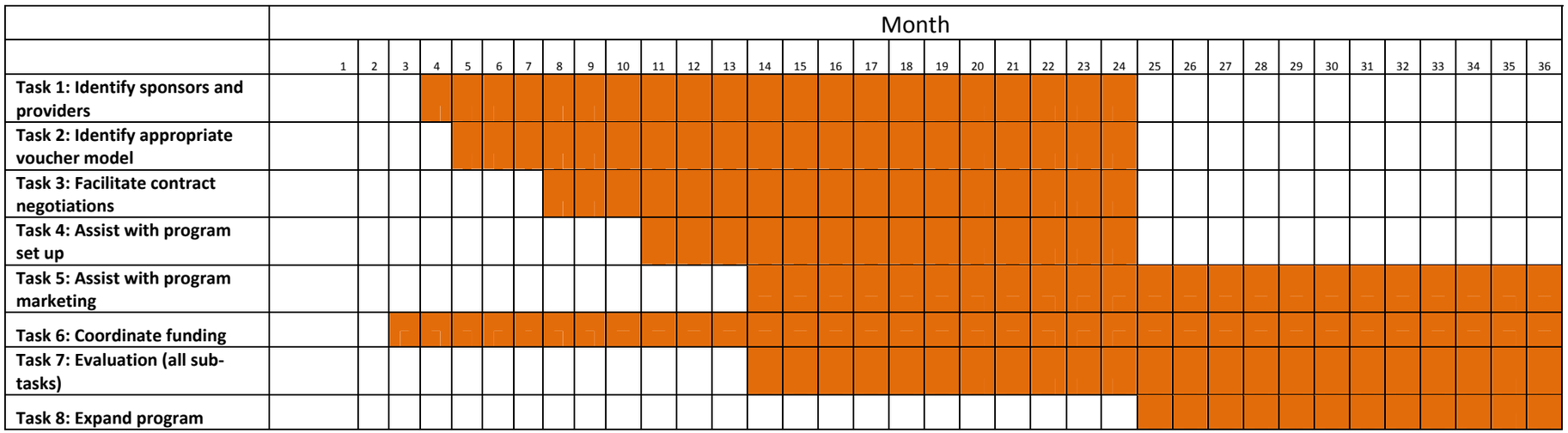
Call Center

	Month																																		
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
Task 1: Finalize Functions & Policies																																				
Task 2: Finalize technology																																				
Task 3: Implement Systems																																				
Task 4: Market the Call Center																																				
Task 5: Launch Call Center																																				
Task 6: Monitor usage																																				
Task 7: Evaluation																																				
Task 8: Next Steps and new services																																				
Future options	Beyond year 3, in coordination with interested parties.																																			

Coordination Effort



Voucher Programs



Part 5 – Staffing & Responsibilities

Program Director

Full-time equivalent: 1

Expected time of hire: Position already filled as of January 2011

Responsibilities and job functions

- General oversight of the Mobility Management System
  - Defining final direction and function
  - Management of subordinate staff as hired
- Establishing the Call Center
  - Determining final design and function
  - Developing and issuing RFPs if required
  - Negotiating and managing consultant contracts
- Managing and leading the coordination effort
  - Outreach to area stakeholders and members of the public
  - Establishment of the Advisory Council and facilitation of meetings
  - Establishment of working groups and facilitation of meetings *(This responsibility will shift to Mobility Managers as warranted by workload)*
  - Encourages continuous discussion to identify new areas of cooperation and coordination
- Evaluating and reporting on the Mobility Management System
  - Collecting monthly statistics about the Call Center
  - Evaluating the coordination effort from the perspectives of both the Mobility Management Team and area stakeholders
- Research on critical issues impacting coordination and mobility in Northeast Westchester *(this responsibility will shift to the Mobility Coordinator when that individual is hired)*
- Identify funding opportunities and write grant applications *(this responsibility will shift to Mobility Coordinators as they are hired)*
- Makes presentations at meetings and attends conferences and workshops
- Leads the marketing and educational efforts to promote the Mobility Management System

Mobility Coordinator

Full-time equivalent: 1

Expected time of hire: Expected in month 4 to assist with the development of the Call Center

Responsibilities and job functions

- Call Center management

    - Oversee the final implementation of Call Center systems and support infrastructure including:
        - Telephone system
        - Database management system
        - Web site and Web-based applications
    - Collecting and maintaining data in the Call Center database
    - Test the Call Center
    - Manage the launch of the Call Center
    - Evaluate and report on the operations of the Call Center
    - Provide phone coverage support for the Call Center Operator
- Coordination effort
    - Assist with management of volunteer ride program coordination
        - Promotion of volunteerism in Westchester
        - Facilitating working group meetings and encouraging cooperation among programs
        - Pushing forward with action items from meetings
    - Assist with management of home health care worker transportation coordination
        - Facilitating working group meetings and encouraging cooperation among agencies
        - Pushing forward with action items from meetings
        - Coordinating and assisting with grant applications
        - Research on critical issues
    - Assist with management of municipal transportation service coordination
        - Facilitating working group meetings and encouraging cooperation among municipalities
        - Pushing forward with action items from meetings
        - Coordinating and assisting with grant applications
        - Research on critical issues
    - Assist with management of transportation voucher program oversight
        - Facilitating working group meetings and encouraging participation in voucher programs
        - Pushing forward with action items from meetings
        - Coordinating and assisting with grant applications
        - Assisting with set up and administrative functions as appropriate
        - Evaluation and reporting of voucher programs
        - Marketing of voucher programs
        - Research on critical issues

Call Center Operators

Full-time equivalent: Up to 2

Expected time of hires

- Approximately month 7 for the first Call Center Operator

- Exact hire dates of each will depend on call volume at the Call Center. Positions may begin as part-time

Responsibilities and job functions

- Act as the Call Center operator during normal business hours
- Assist with reporting and data collection at the request of the Mobility Coordinator

Staffing schedule

	Month of hire and expected duration																																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
Program Director (1 FTE)																																				
Program oversight																																				
Overall coordination effort																																				
Establishment of Call Center																																				
Management of Advisory Council																																				
Management of Working Groups																																				
Community Outreach																																				
Research and funding																																				
Marketing and Education																																				
Program evaluation																																				
Mobility Coordinator (1 FTE)																																				
Call Center development and management																																				
Assist management of volunteer ride program coordination																																				
Assist management of home health care worker transportation coordination																																				
Assist management of municipal transportation service coordination																																				
Assist management of transportation voucher program oversight																																				
Call Center Operators (0.75 -2 FTE)																																				
Answer calls and provide information																																				

Part 6 – Best Practices: Case Studies, Toolkits and Resources

The resources below are meant to provide more detailed guidance on how to develop and foster a successful mobility management system. The links provided are current as of January 2010.

Call Center

Case Studies

Institute for Human Services – Steuben County, NY

See attached case study

Contact: Carol Wood, Director, 2-1-1 Helpline
IHS
Bath, NY 14810
607-776-9467 x 219
WoodC@ihsnet.org

Dane County – Wisconsin

See attached case study

Lane County Transit District – Lane County, Oregon

See attached case study

Lower Savannah Council of Governments - Lower Savannah Region, SC

Developing a One Call Center: A Story of Progress in the Lower Savannah Region of South Carolina. Lower Savannah Council of Governments. April 2008.
http://web1.ctaa.org/webmodules/webarticles/articlefiles/Developing_One_Call_Center.pdf

New Facility Empowers Regional Mobility Management. CTAA. Fall 2010.
http://web1.ctaa.org/webmodules/webarticles/articlefiles/Fall-2010-Digital-CT-New%20Facility.pdf

Contact: Dana Luttrull
Transformation/Mobility Services Manger
dluttrull@lscog.org

Paducah Area Transit System - Paducah, Kentucky

Purchase Area Transportation Coordination Center http://www.paducahtransit.com/MSAA.html

Contact: Zana Renfro
zrenfro@comcast.net

Transit Authority of River City - Louisville Region, KY

Travel Management Coordination Center -
http://www.nritsconference.org/downloads/Presentations10/TMCC_Rao.pdf

Contact: Priscilla Rao
Director of Paratransit and Customer Service
(502) 213-3245
prao@ridetarc.org

Toolkits

One-Call Transportation Services Toolkit
With funding from the U.S. Department of Labor Office of Disability Employment Project and in cooperation the Federal Transit Administration, the Community Transportation Association of America (CTAA) is finishing a One-Call Transportation Services Toolkit. The Toolkit will guide organizations in communities to partner and work together – whether locally, regionally or statewide - to develop a one-call service for transportation via phone and on the Web. Communities can choose to start small, follow one of a number of different models, and develop technologically and functionally from information and referral to reservations, dispatching, and more. The Toolkit will empower communities to select the right fit for their own circumstances. The Toolkit will be a set of on-line tools, including:

- A Guide to Beginning One-Call Transportation Services
- The Benefit of Experience: Advice from One-Call Services Practitioners and Advocates
- Profiles from Nine Communities,
- The Results: A Survey of Existing One-Call Services, and
- A set of supplemental resources, such as factsheets, a glossary and links to more information.

Check the Community Transportation Association of America (CTAA) website in early 2011 for the full toolkit at http://web1.ctaa.org. Alternatively, contact Pamela Friedman, Joblinks Program Specialist at friedman@ctaa.org or by phone at 800.891.0590 x 720

Resources

Developing a One-Stop Shop for Public/Specialized Transportation Information in Montana. State of Montana Department of Transportation. November 2008.
http://www.mdt.mt.gov/research/docs/research_proj/one_stop/final_report.pdf

Transit, Call Centers, and 511: A Guide for Decision Makers. TCRP Report 134. February 2009. http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_134.pdf

Some Questions and the Potential of a Mobility Management Call Center. http://www.nctransit.org/09conference/09ConfPresentations/CYRA_MobilityManagement.pdf

AIRS Standards for Professional Information & Referral and Quality Indicators. http://www.airs.org/files/public/AIRS_Standards_6_0Final.pdf

Coordination

Case Studies

Community-based Mobility Strategy (CBMS) Task Force – Detroit, MI http://www.fta.dot.gov/planning/metro/planning_environment_3957.html

See Case Studies in Toolkit for Rural Community Coordinated Transportation Services. TCRP Report 101. 2004. http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_101.pdf

Toolkits

Toolkit for Rural Community Coordinated Transportation Services. TCRP Report 101. 2004. http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_101.pdf

Transportation Coordination Toolkit from the Minnesota Department of Transportation. November 2005. http://www.coordinatemntransit.org/reports/toolkit/documents/00-FullToolKit.pdf

Coordinating Transportation Services: Local Collaboration and Decision-Making – A "How-to" Manual for Planning and Implementation. Project ACTION. May 2001. http://projectaction.easterseals.com/site/DocServer/210001.txt?docID=3604

Mobility Management: A Toolkit for Creating an Organizational Culture and Management Structure Conducive to Mobility Management. Leadership APTA Class of 2005. July 22, 2005. http://sites.google.com/site/icctclearinghouse/mobility-management/mobility-management-library/AToolkitforCreatinganOrganizationalCultureandManagementStructureConducivetoMobilityManagement-Summary.doc?attredirects=0&d=1

Resources

Community-Based Senior Transportation Coalitions: Lessons Learned. National Center on Senior Transportation. March 2009. http://seniortransportation.easterseals.com/site/DocServer/Coalitions_and_Lessons_Learned_FINAL_3_26_09.pdf?docID=103984

Transportation Coordination Primer from the Interagency Coordinating Committee on Transportation (ICCT) Clearing House. Third Edition, January 2009.
http://www.iira.org/outreach/pdf/ICCT%20Coordination%20Primer%20-%20FINAL-%201-09.pdf

Strategies to Increase Coordination of Transportation Services for the Transportation Disadvantaged. TCRP Report 105. 2004. http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_rpt_105.pdf

Improving Public Transportation Services through Effective Statewide Coordination. NGA Center for Best Practices. 2002. http://www.nga.org/cda/files/011503IMPROVINGTRANS.PDF

Voucher Programs

Case Studies

Rural Transportation Voucher Program for People with Disabilities: Three Case Studies
http://ntl.bts.gov/lib/9000/9000/9095/4bernier.pdf

Toolkits

Association of Programs for Rural Independent Living (APRIL)

Toolkit for Operating a Rural Transportation Voucher Program (APRIL)
See included CD

Research and Training Center on Disability in Rural Communities (RTC Rural)

The Supported Volunteer Rural Transportation Voucher Program
http://rtc.ruralinstitute.umt.edu/Trn/TrnManual.htm

Resources

Transportation Voucher Programs: Enhancing People's Connection to Employment and Other Quality of Life Destinations http://sites.google.com/site/voucherprogram/home

Transportation Voucher Programs: Facilitating Mobility in Rural Areas
http://www.ctaa.org/webmodules/webarticles/articlefiles/Rural_Voucher_Programs.pdf

IBUSS Beta Test Site Report http://ndcpd.misu.nodak.edu/grit/Ibuss_Report.htm
GRIT's Community Assessment Online http://www.ndcpd.org/grit/CAOwelcome.html

Implementation Plan

Appendix A – Three Call Center Case Studies

Howard/Stein-Hudson Associates, Inc.
CREATIVE SOLUTIONS • EFFECTIVE PARTNERING ®

ONE CALL-ONE CLICK Case Studies

STEUBEN COUNTY, NEW YORK

BACKGROUND

Steuben County is a mostly rural county, with approximately 96,000 residents, located at the northern fringe of the Appalachian region in New York State's Southern Tier. Local interest in transportation coordination initially was articulated in the October 2002 Schuyler-Steuben Rural Transportation Needs Study, and defined more clearly in the Human Services Coordination Plan (HSCP) completed in June 2007. The HSCP was prepared by staff of the Elmira-Chemung Transportation Council (ECTC), which is the metropolitan planning organization for the City of Elmira in Chemung County and the City of Corning in Steuben County.

ECTC also organized and facilitated meetings of the Schuyler-Steuben Transportation Committee to ensure stakeholder input during the study process. New York State Department of Transportation (NYSDOT) also served as an active proponent of coordination during and after completion of the HSCP. The coordination planning process incorporated a formal assessment of community resources, functions, and gaps in transportation services, and generated the following key recommendations:

- A "mobility management" function for the County should be developed to provide the public with transit information and referral (I&R) to transportation services, and to assist with further coordination efforts.
- Scheduling and dispatching software should be acquired for Steuben Area Rides, and potentially for other transit service providers in order to coordinate existing and new public rider services.
- Increased involvement by, and coordination with, the Steuben County Department of Social Services is needed. Collaboration with other agencies in the County, where coordination of services could be of benefit to County residents, also is encouraged.
- Creation of a marketing program for the various transit services available in the County is needed to give them a common identity and improve residents' awareness of, and access to, the county-wide transit system, tied to the easy-to-remember 2-1-1 telephone number and comprehensive information and referral service.
- Definition of potential transportation needs that could be funded by the FTA Section 5317 New Freedom program.
- Continued discussion of additional coordination efforts should be undertaken by a Steuben-specific advisory committee.

Although the HSCP did not recommend a specific organizational approach for coordination, two alternatives were cited for further discussion. The choices were either to locate the mobility management function

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within an existing transit service provider's (mostly likely Steuben Area Rides) organization, or to assign it to the Institute for Human Services, which operates a five-county 2-1-1 information and referral service and coordinates a volunteer-driver-based county-wide transportation service but is not a transit service provider.

Currently there are five public transportation providers operating in Steuben County:

- Steuben County and the City of Corning contract with First Transit, a for-profit firm, to manage and operate the Corning-Erwin Area Transit System (CEATS), which provides fixed-route services in Corning, Painted Post, Gang Mills and Coopers Plain.

- Steuben County also contracts with First Transit to manage and operate Steuben County Transit (SCT) fixed routes serving the Villages of Bath and Hammondsport, and connecting between Bath and the City of Corning.

- The City of Hornell sponsors its own local "HAT" system, which includes a local fixed route in the Village and connecting rural routes extending into neighboring Allegany and Livingston County. A locally based for-profit service contractor is used for service delivery.

- The Arc of Steuben operates a primarily client-based transportation program that includes several Steuben Area Rides (StAR) bus routes that are open to the general public. These were formerly client-only bus routes that cover areas not otherwise served by public transit. There was residual capacity to accommodate additional riders.

- Chemung County Transit System (CCTS) primarily serves the City of Elmira in Chemung County, but also extends to Corning and Corning Community College in eastern Steuben County. CCTS is managed and operated by First Transit as well.

In 2009, the Steuben County Transportation Advisory Committee (SCTAC) was formed to oversee better integration of public transportation and Non-Emergency Medical Transportation (NEMT) services using a mobility management approach. The Institute for Human Services (IHS) was selected to lead the implementation of the next phase of coordination at that time.

Founded in 1984, IHS is a non-profit organization providing management support services, information and referral, technology administration and capacity-building services for the regional non-profit and health care sector. The Institute is a member-based organization composed of funders, planners and providers working in the Southern Tier non-profit and health care sectors. Its stated mission is to improve the quality of life in the Southern Tier by increasing member agencies' capacity for success. Annual membership dues range from $45 to $225, depending on the size of the organization. IHS also generates revenue from management and administrative services provided to members, including development, implemen-

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tation and evaluation of sound strategic, operating, fiscal and technology plans.

IHS' program structure, which is shown in Figure 4: Institute for Human Services Organizational Concept, is organized around three broad functions: Communication Programs, Capacity-building Programs, and Collaboration Programs.

Funding required to engage IHS in the coordination process came from an FTA Section 5316/5317 JARC/ New Freedom grant awarded to IHS by NYSDOT in 2009. The Steuben Coordinated Transportation (SCT) Project work scope includes four primary tasks:

- Create and staff a full-time Mobility Manager position to carry out the day-to-day transition to mobility management by coordinating services and planning among Steuben County's varied public, private, and volunteer transportation programs, and increasing transportation access for the low-income, elderly, and disabled to get to and from the employment and services they need.

- Coordinate transportation service marketing and promotion to create a common identity for the transit system in Steuben County that improves residents' awareness of, and access to, the services available, and increases availability and ridership among transit providers.

- Expand the existing toll-free 2-1-1 regional one-call information Helpline to include specialized transportation information & referral services. Provide information and referral, data collection, and online database information management services.

- Provide technology assistance supporting procurement of mobility management (scheduling) software suited to a multi-user environment; and provide hosting and network administration services for the scheduling system installed on an IHS computer network server. Transit providers, and potentially other specialized transportation providers, will need to have access to the system via the Internet.

REASONS FOR THIS SELECTION

NYSDOT and Steuben County Planning staff recognized that coordination among five transit providers would pose a challenge without the involvement of an "honest broker" to provide leadership and staff resources to implement a coordinated system. IHS was invited to take a leading role in the coordination process for a number of reasons, notably:

- The Institute's mission and reputation for maintaining neutrality and providing all services with impartiality and integrity were well-established. IHS brings together member organizations and assists them in functioning as a comprehensive, collaborative and coordinated network of planners, funders and providers.

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STEUBEN COUNTY, NEW YORK

- IHS is overseen by an 18-member Board of Directors representing a wide cross-section of local organizations and local governments, including a number of transportation stakeholders:

    - Steuben County Administrator
    - Board Member, United Way of the Southern Tier
    - CEO, Arbor Development (housing/shelter services)
    - Executive Director, Pro Action of Steuben and Yates, Inc. (community action program)
    - Executive Director, Catholic Charities of Steuben County
    - IHS Board Member At-Large
    - Director, Steuben County Department of Community Services
    - NY Connects / Caregiver Coordinator County Office for the Aging
    - Executive Director, Arc of Steuben
    - Deputy Director, Legal Assistance of Western New York
    - Director, Continuing Education Corning Community College
    - Executive Director, Steuben County School Boards Association
    - Director, Steuben County Public Health and Nursing Services
    - Board Member, Bethesda Foundation Board (health services)
    - Commissioner, Steuben County Department of Social Services
    - Program Officer, Community Foundation of Elmira-Corning and the Finger Lakes
    - Executive Director, CSS Workforce NY
    - Social Worker Executive, Bath VA Medical Center
    - Assistant Professor, Alfred University School of Psychology/Counseling

- IHS administers the volunteer-driver-based Steuben Coordinated Transportation program as a partnership with the Steuben County Office for the Aging, United Way of the Southern Tier, and 2-1-1 Helpline.

- IHS already is the 2-1-1 regional call center service provider in Steuben and neighboring counties, and it was determined that adding transportation one-call service would present fewer challenges than setting up an entirely new program. The 2-1-1 service is an established toll-free help line operated in accordance with state and national standards for information and referral, with sufficient capacity to meet anticipated demand, ACD capability for call routing and state-of-the-market I&R software staffed by IHS personnel. Volunteer clearinghouse software is also in place, and information concerning the SCT volunteer-driver program already is provided.

- IHS is a technology-focused organization with an internal Information Technology (IT) Department providing network administration and related services to member agencies on a fee-for-service basis. IHS is perceived to be a competent provider of technology services, with personnel resources capable of supporting the effort to acquire next-generation scheduling software to support productivity gains.

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INSTITUTIONAL RELATIONSHIPS

Assuming the self-described role of "Neutral Convener"[1], IHS became an FTA sub-grantee through an agreement with NYSDOT in October 2009. This relationship is more accurately characterized as a negotiated partnership than a more-typical grantor-grantee agreement resulting from a competitive grant application process. IHS hired a Mobility Manager in February 2010. Figure 5 shows the Steuben Coordinated Transportation Project organization table reflecting two primary stakeholder groups that comprise the Mobility Management Advisory Committee (MMAC). The transportation providers appearing on the left side of the table include public transit systems, not-for-profit consumer specific services and private, for-profit providers. Other participating stakeholders on the MMAC are listed on the right side of the table and include transportation planners, funders and consumers representing 14 agency programs and governmental offices.

ONE-CALL SCOPE OF SERVICE

The main objective of the transportation one-call service at the present stage of development is to provide basic information and referral services to consumers via the existing toll-free 2-1-1 Helpline. Information will be available for all providers of public transit, ADA paratransit or specialized transportation services, Aging and Disability support services, personal and family health services, temporary aid to families and individuals, and privately operated transportation services, including taxis and other human service program transportation.

Each caller will be pre-screened for probable eligibility for specific services using criteria such as age, disability, income or other program-specific criteria. Upon completion of a brief screening interview, 2-1-1 Helpline staff will transfer the phone call to a particular provider while the caller remains on the phone. It is anticipated that IHS involvement will conclude upon transfer of the call. A definitive eligibility determination and the transportation service itself will be provided by the service provider or a designated third party.

ONE-CALL FUNCTIONALITY AND TECHNOLOGY

The transportation one-call service is partially functioning at present within the 2-1-1 Helpline but will become more specialized for Steuben County providers. 2-1-1 Helpline staff is housed in the IHS central office located on a main county road outside the Village of Bath, NY. Currently there are 3.5 FTE dedicated I&R staff, plus two to three other administrative or part-time staff who handle the overflow of calls during

1 Telephone discussion with IHS Executive Director Patrick Rogers, March 12, 2010.

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the busiest times. After-hour and weekend service is provided by ABVI-Goodwill in Rochester, NY, the 2-1-1 provider for Monroe and five additional counties, using remote access to the 2-1-1 Helpline database.

INTEGRATED TELEPHONE SYSTEM

The Institute's 2-1-1 Helpline has a Samsung OfficeServ phone system with seven incoming lines, automatic call distribution (ACD) to as many as 12 workstations, each with networked access to the resource database and call-screening protocols. ACD reporting includes time to answer, rate of abandoned calls, average queue time and other data.

IHS uses "REFER" Information & Referral software that supports data collection about caller characteristics and referrals made. The needs of each caller are assessed, and results are filtered based on applicable criteria, including geographic area served, eligibility, purpose of trip, for example. State and national standards for I&R encompass data elements, data accuracy and updating requirements, classification, quality assurance measures and staff certification. Standard and customized reports provide important information to the agency providers and collaborative work groups. This includes reporting to agencies on the calls received.

INFORMATION DATABASE

IHS' current one-call service database includes information for approximately 500 agency programs and thousands of individual services. Users may call or search the database online (by keyword, category or agency name) and results are geographically specific. The information for each program is updated annually for each agency, primarily via electronic formats. Although there are no formal written agreements with the agencies partnering to provide their program
information, IHS reports a 97% response rate associated with implementing online data collection, a significant increase that coincided with discontinuing the use of paper forms. Services accessed through the NY 5-1-1 travel information telephone number are also noted in the database.

RESERVATIONS AND SCHEDULING

Although the transportation one-call service will not be actively involved in accepting reservations for rides or scheduling trips, IHS is playing an important role in the procurement and implementation of new paratransit scheduling software. The JARC/New Freedom grant includes 80% federal funding to acquire the software through an ongoing competitive procurement process. The prospective users of the system will provide the required 20% local share on a pro-rata basis. IHS will host the software and facilitate a multi-user environment, enabling the transit providers to utilize it without the burden of ownership and maintenance.

LOOKING FORWARD

IHS will be looking for alternative grant-funding opportunities in the future to cover the ongoing costs of providing mobility management services.

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Community Transportation Association

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TRANSPORTATION SERVICES TOOLKIT

ONE CALL-ONE CLICK Case Studies

LANE COUNTY TRANSIT DISTRICT, OREGON

BACKGROUND

This program is an example of a transit district that has developed a one-call service (known as RideSource), and has an array of programs supporting accessibility among individuals with disabilities. In the last two years the RideSource Call Center has expanded to a one-call service that serves as Medicaid non-emergency medical trips (the Oregon Health Plan Plus program),as well as ADA paratransit, which means that the one-call center serves an unusually wide group of clients.

Lane Transit District (LTD) operates within Lane County, primarily within the Eugene/Springfield urban area, with service to nearby rural communities. Through LTD's Accessible Services, programs for older adults, people with disabilities, and those with low incomes are extended throughout the entire county. The service area covers more than 4,700 square miles and has a population of 347,000. The largest cities are Eugene (population 155,000) and Springfield (population 58,000).

DEVELOPMENT OF ONE-CALL SERVICES

ORGANIZATIONAL CULTURE

Lane Transit District has a long-standing culture of providing services to individuals with disabilities and coordinating with other organizations in the community. It "lives and breathes accessibility" and has an Accessible Services Department within its Service Planning, Accessibility, and Marketing Division.

LTD was an early adaptor of coordination, with activities spanning 30 years. By 1981, LTD had identified full accessibility of fixed-route buses as a key solution to providing mobility to people with disabilities, and began to implement this service.

MISSION STATEMENT

LTD enhances the community's quality of life by:

- Delivering reliable, responsive, and accessible public transit services.
- Offering innovative services that reduce dependency on the automobile.
- Providing progressive leadership for the community's transportation needs.

LTD views itself as a partner agency in improving the quality of life in the community as illustrated in its mission statement. The LTD web page describing the organization is also illustrative: "We are honored to serve a diverse community of commuters, students, seniors, and families on our buses every day. We work with many partners, from city, county, and state agencies, schools, chambers of commerce, and area

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employers to provide transportation services that improve the quality of life in our community."

LTD has a single advisory committee for services geared to individuals with disabilities and older adults. It is open to agencies and consumers.

SERVICES AND PROGRAMS

LTD's role in enhancing the community's quality of life is illustrated in the range of services it operates: local and regional bus service, a bus rapid transit line, a full range of commuter services (carpools for commuters and students, emergency-ride-home program, education and resources for employers and employee transportation coordinators), and RideSource paratransit services. The system provides more than eight million rides annually – an average of 30 annual rides per capita.

RideSource is LTD's complementary paratransit service. In addition, programs have been developed to support the use of fixed-route services for individuals for whom this is an option. Training programs include:

- Lift-use training;
- Transit host services;
- One-on-one individualized training;
- Life skills field trips for students; and
- Bus trainer support for agency personnel.

In addition, LTD provides training to private providers, volunteer drivers, and human service agencies. The Bus Buddies Program has been integrated with the individualized training services. These training services include defensive driving, drug and alcohol testing, and practical skills in serving people with disabilities.

LTD has served as a regional coordinator for many years, with a working knowledge of other transportation resources. Staff described their services as a "mini" call center, as call-takers were able to use their working knowledge to refer passengers needing other services to appropriate resources. As LTD has taken on broader responsibilities through its one-call service, its staff are developing a definitive list of transportation resources.

EXPANSION TO A ONE-CALL SERVICE

Since 1990, reservations and eligibility for RideSource services have been provided with a focus on ADA Paratransit. Two years ago, LTD expanded to a full one-call service that includes Medicaid Non-Emergency Transportation (NEMT) for all Oregon Health Plan Plus participants.

The State of Oregon understands the value of coordination, and its support for transportation coordination has enabled the development of this one-call service. The state started looking at a brokerage model for non-emergency medical trips 12 years ago. The first was established in Portland, and Lane County was the last. Oregon Department of Human Services had agreed to work with a local agency partner – either a transit agency or human service agency – in a coordinating role for transportation services. The agency

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wanted to work with a single partner in a region through an Intergovernmental Agreement to serve as a broker for trips[1].

While LTD was a logical choice because of its role in providing transportation and accessible services, it had to address critical questions about how to take on such a program. It also had to evaluate the impact of what would be a phenomenal expansion in terms of responsibilities for determining eligibility (a completely different set of rules than LTD was used to) and in sheer call volume. The program would more than double call volume, adding 42,000 people to the system.
LTD's decision to take on this service as a broker was built on a foundation of its mission, years of coordination activities, and support from local agencies that worked with persons eligible under Medicaid.

Program implementation required LTD staff to address many issues and details. It has resulted in some different approaches to effectively meeting the needs of customers. Some key points are identified in the next section.

CHANGING PERSPECTIVE

The addition of brokering Oregon Health Plan Plus transportation services has resulted in LTD developing new perspectives. While LTD had always supported coordination, taking on this service expansion required that it step into the role of providing transportation for a large, complicated human service program. One of the changes is that LTD is doing more outreach.

Previously call-takers would respond with the services for which they had information, but were not trained to go beyond that. Advocacy is now a more important part of the one-call service. Another is that LTD has a new understanding of the standards, rules, and protocols of Medicaid nonemergency medical transportation and transportation for individuals in long-term care programs.

MEDICAID SERVICES

Taking on Medicaid transportation services was a major decision. There was "fear of the unknown" and the reality that the number of calls would double overnight. In Portland, ADA and Medicaid are handled separately – so this was a new model.

LTD has gone out of its way to create a transparent system that has a threshold of accountability acceptable to Medicaid. Within Medicaid there is a view, likely influenced by a few high-profile cases, that contractors, and even consumers, might take advantage of the system. LTD has had to prove that it doesn't

1 Oregon does not have a capitated system for Medicaid services. LTD staff noted that this approach would be more difficult to accomplish under a capitated system.

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operate that way. LTD spent a year and retained a third-party consultant to develop a method for distributing costs across multiple programs fairly, but within the strict guidelines set by the Center for Medicaid Services (CMS). LTD now uses a "random moment sample" to allocate costs between call-takers for Medicaid services and other RideSource services. While each call-taker may record only a few sample calls a day, over the course of a year that call-taker will collect tens of thousands of samples upon which to base the cost-allocation.

There remains a lack of understanding between what the Department of Human Services asks for in making its system work within the transportation Call Centers throughout the State and what CMS auditors check for and how they conduct their audits. This is the sort of thing that takes time to understand and work through. Auditors typically come from a medical services background and do not fully acknowledge that transportation services are different. It is often necessary to find ways to bridge this gap.

Trusting relationships needed to be formed to make this transition successful. There were essential components that LTD required when incorporating Medicaid transportation within the Call Center. LTD uses a fully allocated cost rate for trips. Each service provided through the Call Center is different, depending on contracts and agreements. Each has different characteristics. For example, ADA Paratransit does not offer same-day service, but Medicaid requires same-day response for scheduling transportation to a covered medical service. Such distinctions help clarify differences between services and associated costs.

ELIGIBILITY

In order to determine eligibility for Lane Transit District's ADA transportation service, customers are required to participate in an in-person interview. This interview usually takes place in the customer's home and always with a well-trained, professional Transportation Assessment Coordinator present. During the in-person interview, the customer is asked questions about his or her ability to ride LTD fixed-route buses. The interview typically takes about one hour. The Transportation Coordinator explains how the service works, describes eligibility considerations, and answers the customer's questions.

When first introduced, Medicaid services program eligibility followed a different process. Program eligibility was verified first, and then an in-take process for transportation options was conducted by phone to determine the customer's ability to use the fixed-route service and what other options were available for eligible trips.

LTD's current project is integrating eligibility for Medicaid and ADA services. It has taken many steps toward putting this in place. The planned process begins with a functional in-person assessment that also identifies trip needs and explores how the individual currently makes trips.

LTD has developed a functional assessment form to aid in this process, although it is still being tested and may be further refined. It was based on a form used at a Community Transportation Association of America (CTAA) training session for coordinated transportation.

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LTD also has developed a flow chart that illustrates the eligibility process. The process begins with questions by the intake call-taker to determine if the individual is a bus rider or is potentially eligible for expanded services. If there is potential eligibility for expanded services, a questionnaire is sent and a functional assessment scheduled. A copy of this flow chart is included at the end of the case study.

Another unique part of the eligibility process is that LTD is partnering with the Area Agency on Aging to have its case workers serve as transportation coordinators and complete the functional assessments. These area coordinators can assess customer needs for home-delivered meals, transportation, and other services at one time. These assessments are done in the home. An advantage is that it enables LTD to problem-solve with medical transportation managers.

At this point the process has been tested in one area. It has been refined, and LTD has a good understanding of what is needed. The logistical steps are being worked through, and basic agreements are in place. The plan is to train 10 people to complete these functional assessments.

The initial result is that the consumer process of obtaining eligibility is simplified. A common fear of transit agencies is that an advocate, such as a case worker, will "give away the bank" and not follow strict eligibility guidelines. LTD does the training, so the area coordinators know the guidelines. So far it appears that LTD is getting more conditional eligibility determinations than before this model was implemented.

TECHNOLOGY

LTD has complete information on accessible services and training options on its website at http://www.ltd.org/ridingltd/accessibleservices.html. From this address you also can access information on RideSource services (see the menu on the left-hand side of the page).

Technology is currently an important topic at LTD. The agency recognizes that a new software platform is needed due to LTD's expansion and that the agency has so much invested in its current platform that it will be hard to find something comparable. It may be costly to adapt what is available to meet LTD's needs. Over the years, LTD has adjusted its current platform so it uniquely meets its needs. But doubling call volume and trips is causing serious discussion about how to move forward with technology.

LOOKING FORWARD

Lane Transit District is actively integrating its eligibility processes, with a focus on identifying the abilities of riders to use the services they are capable of riding. Fully training Area Coordinators to conduct functional assessments and getting this system set up throughout the District is a major activity for LTD going forward.

LTD is a good example of the time these processes take and how there is usually something around the corner to address in efforts to improve service for the rider and operating efficiencies for the organization.

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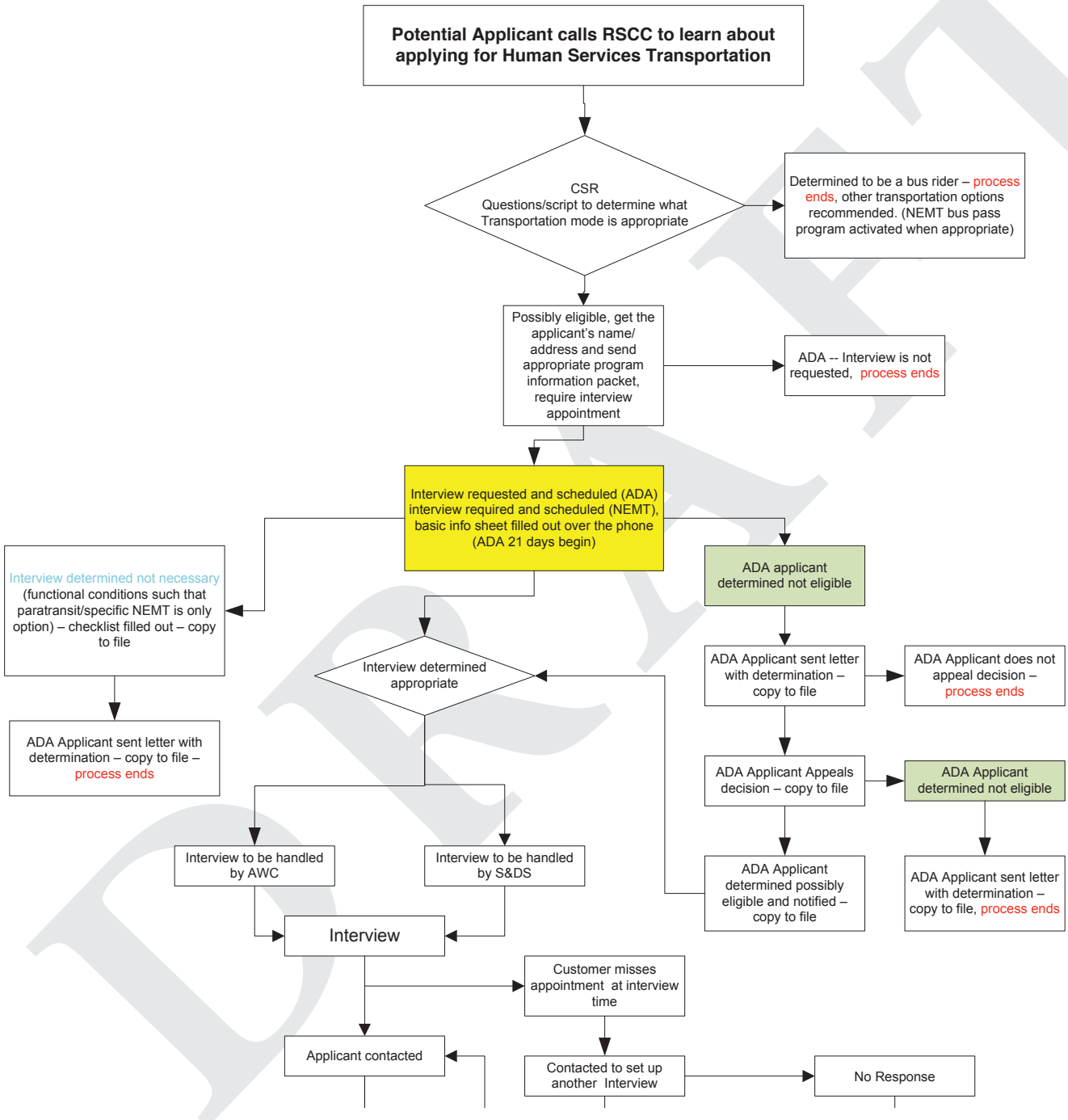
CHART 1: Interview Flowchart



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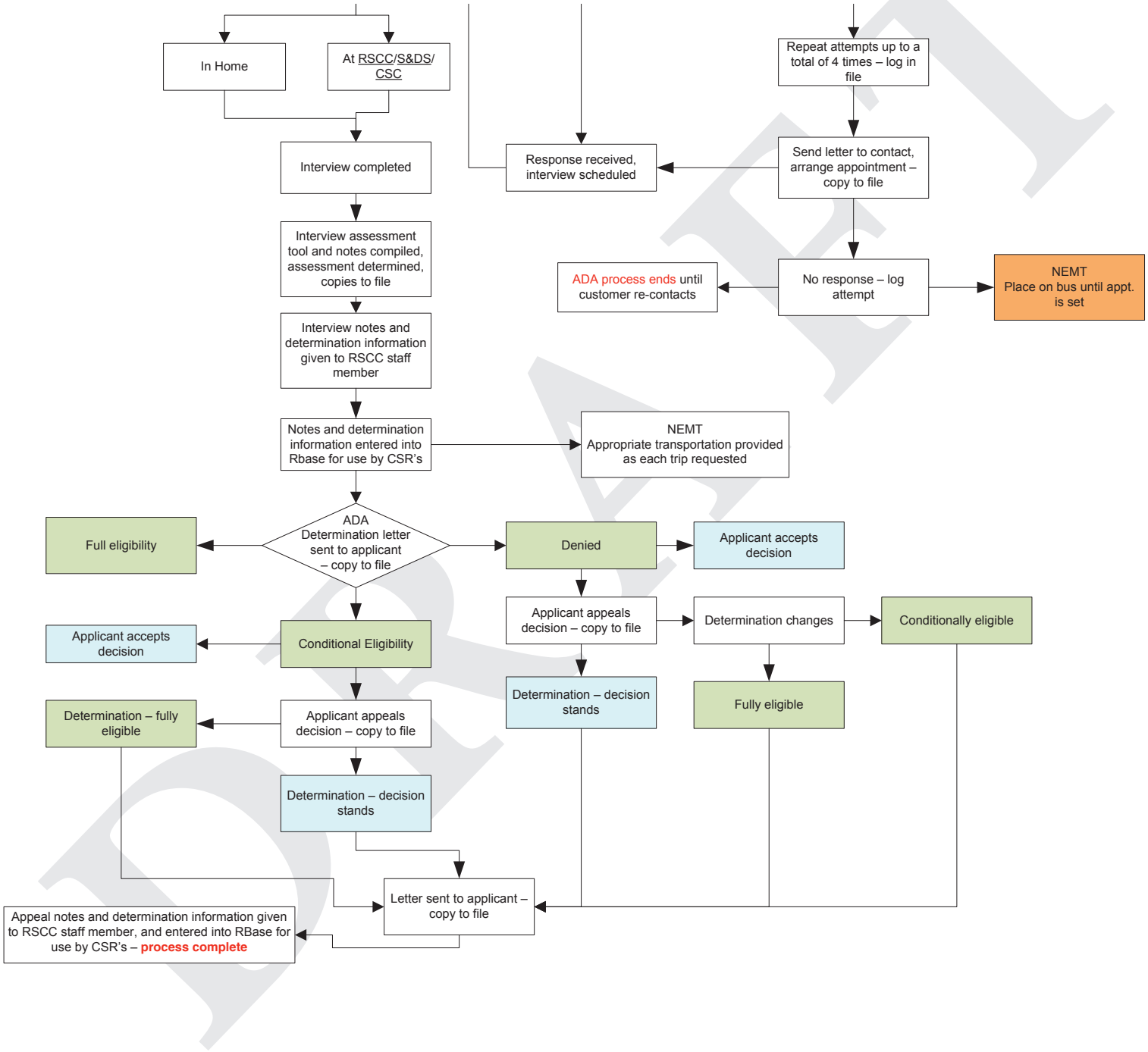
LANE COUNTY TRANSIT DISTRICT, OREGON



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TRANSPORTATION SERVICES TOOLKIT

ONE CALL-ONE CLICK Case Studies

DANE COUNTY, WISCONSIN

BACKGROUND

Dane County and its largest city, Madison, provide an example of a large urban area where the County has taken the lead in providing one-call services. Both the City and County have a long history of working together on coordination activities – and this also is an example of a one-call service as part of an overall strategy to coordinate transportation resources.

Dane County has a population of more than 475,000 and covers 1,238 square miles. There are over 60 cities, towns and villages. Madison is the state capital, county seat, and largest city, with a population of 232,000. Madison is the central city in an urbanized area that had a population of nearly 330,000 in 2000 and covers about 84 square miles.

CONDITIONS PRECEDING ONE-CALL SERVICES

Both Dane County and the City of Madison have pursued transportation coordination and developed a range of services to support improved mobility for residents and efficient use of resources.

Madison's Metro Transit is a city utility. It provides fixed-route transit service within the City of Madison, Town of Madison, City of Middleton, City of Fitchburg, and University of Wisconsin Madison Campus. Commuter service only is provided to the Village of Shorewood Hills. Metro Transit works cooperatively with Dane County, for example, by alerting ADA Paratransit riders to the availability of Senior Group Access Services.

The Dane County Department of Human Services administers routed group ride and demand-responsive services for the elderly and persons with disabilities, contracting with private providers for this service.

- The Senior Group Access Service (GAS) provides regularly scheduled weekday routed group trips for seniors and persons with disabilities. Service is provided within five senior coalition areas. This service is neighborhood-based and connects residential areas to nearby nutrition sites, shopping areas, farmers' markets, pharmacies, and libraries. Within each coalition area, shopping trips are provided mid-morning and mid-afternoon, with meal-site trips in mid-day.

- Rural transportation for seniors and persons with disabilities is provided in eight geographic areas of the county. This service is modeled after the GAS service in Madison and is tailored to the needs of each area.

The Retired Senior Volunteer Driver Escort Program (RSVP) provides individual rides primarily to medical appointments. It operates throughout Dane County.

Specialized Transportation Service (STS) provides group rides for adults with developmental or mental

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disabilities traveling to vocational sites or work sites.

Rideline provides limited demand-responsive services to the elderly and persons with disabilities for work, volunteer activities, education or training, and medical trips. This service operates throughout the County, and wherever possible, trips are coordinated with the STS service so trips can be provided on existing routes.

Dane County Department of Human Services (DCDHS) provides limited assistance to transportation services. Most programs are very limited and need DCDHS approval. They include mileage reimbursements and assistance with paying fares. They may look at public transit options, utilizing the primary specialized services that operate within the county, or getting support through non-profit groups (American Cancer Society, Catholic Charities) or other charitable programs.

Previously there were several private medical providers, but most are no longer in business because the rates were so low. There is a real problem providing non-emergency medical transportation trips within Dane County. In some cases, the County authorizes paratransit services because specialized medical providers are not available.

A Coordinated Public Transit – Human Services Transportation Plan prepared in 2008 assessed resources and needs and identified strategies for coordination. In the plan, it was noted that there was a substantial amount of coordination in place:

- Metro Transit and Dane County share state funding to support paratransit, Senior Group Access Service, and the RSVP Driver Escort program.
- Dane County Area Agency on Aging has rescheduled its program start and end times so they fall outside the peak periods experienced on Metro Transit.
- Dane County has integrated nearly all of its transportation for seniors and persons with physical disabilities, coordinating group rides within some programs. Coordination is occurring across programs at both the funding and ride levels.

The plan identified a wide range of coordination needs – specific steps that agencies could take to improve coordination of resources.

The strategies resulting from the plan are listed below. You may also wish to view the plan at the WIDOT website. The specific details of each strategy (such as recommended tasks for the mobility manager) provide a broader understanding of how well each strategy was developed in this planning process.

Communication, Training and Organizational Support

- Develop improved, more-centralized information on available public transit and specialized transpor-

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tation services.
- Hire mobility manager.
- Provide technical training for coordination/mobility management staff.
- Continue to improve and expand current travel training programs.

Coordinate and Consolidate Transportation Services and Resources
- Facilitate contracting with agency operators such as Care Wisconsin.
- Coordinate eligibility-determination functions.

Mobility Strategies
- Improve public transit and specialized services identified in the needs assessment.
- Consider "alternative" transit services such as flexible or deviated-route services in communities, areas, or on days and times when fixed-route bus service is not feasible.
- Continue efforts to improve accessibility at transit stops.

Technology Strategies
- Evaluate, develop, and purchase tools to support data management.
- Evaluate and purchase tools that support live dispatch.
- Evaluate and purchase tools that support improved productivity.

ROLES AND RESPONSIBILITIES

Dane County serves as the lead agency. Dane County, the City of Madison transit utility, and a large managed care organization had already developed working relationships to coordinate services and agreements to put people on the appropriate system regardless of who pays. The agencies work out the cost allocations internally, with costs adjusted to reflect the actual use and payment responsibility.

The human service transportation needs cover all of Dane County, and the County is involved with providing specialized transportation services to meet these needs. The roles and responsibilities of each agency in this arena were previously defined: the agencies work effectively together, and Dane County was the logical organization to take the lead in hiring the mobility manager and establishing a one-call service.

The ease with which these decisions were made reflects the amount of work that has gone into developing not only working relationships, but also agreements between key agencies.

ONE-CALL SERVICES

Dane County hired a Transportation Coordinator and has established a one-call service. Its one-call service

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has:

- Coordinated information for the Dane County Department of Human Services transportation programs, four municipal shared-ride taxi programs, and other transportation options. This has simplified access for consumers.
- Consolidated eligibility for programs other than Madison Metro's ADA Paratransit services. A generic application form is now used, and one staff member determines eligibility and the level of subsidy.
- Obtained a New Freedom grant through WIDOT to support mobility management and provide travel training. People with conditional eligibility can obtain training to use fixed-route services.
- Manage a transit transfer center to support riders with disabilities. Youth Corp participants are supervising people who need to transfer, assisting as needed to help them get to the right bus.
- Participate in a "time bank" barter network that allows some people with cognitive disabilities who know the system well to bank time for training new riders.

The Transportation Coordinator has reached out to medical facilities and businesses to show them how working together benefits their bottom line as well as the community as a whole. They meet with middle managers and discuss good public policy and how they can help each other. The way in which they work together depends on the business. They have reached agreements with local Health Maintenance Organizations (HMOs) to authorize rides at the point of service. This agreement provides for the HMO to assume audit responsibility for the trips.

TECHNOLOGY

The Dane County one-call service uses spreadsheets for tracking calls and trips. Efficiencies would be gained by using a software program, and Dane County is working with WIDOT to procure software to support data management, live dispatch, and service efficiencies. At this point, more than 500,000 trips are provided annually, so there is potential for considerable efficiency.

LOOKING FORWARD

Dane County has a well-defined path forward, with specific goals identified in its Coordinated Public Transit-Human Service Transportation Plan. Its staff are making good progress on implementing the strategies that have been identified. With the procurement of a software program they will have significant work with installing the system, testing it, and developing the protocols that enable it to operate smoothly. With the installation of this technology, Dane County will be able to identify more opportunities for coordination and for addressing customer needs.

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TRANSPORTATION SERVICES TOOLKIT

Financial Plan

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Prepared for
Westchester County Department of Public Works and Transportation

Prepared by
Howard/Stein-Hudson Associates, Inc.

February 2011

Howard/Stein-Hudson Associates, Inc.
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Part 1 - Introduction

The Demand-Responsive Mobility Management System that has been designed for Northeast Westchester has recently been branded and named RideConnect. This Financial Plan provides guidance for launching and developing RideConnect services over the three-year (2011—2013) implementation period for which Family Services of Westchester (FSW) has received a federal Job Access Reverse Commute/New Freedom (JARC/NF) grant. This Financial Plan also provides an annotated compendium of potential funding sources that can be used both to 1) help fund initiatives during the three-year implementation period, and 2) provide continuing support for RideConnect after the three-year grant expires.

The financial information presented here closely follows the Implementation Plan that has been prepared and highlights two key areas of importance:

- Labor expenses for RideConnect services; and
- Direct expenses related to the software set-up and operation of the Call Center.

In terms of labor expenses, the Implementation Plan identifies personnel that fit within the titles, numbers of personnel, and overall responsibilities described in the JARC/NF grant. As far as direct expenses are concerned, there will indeed be direct expenses other than the software/hardware set-up and operation of the Call Center, including travel throughout the Northeast Westchester region for various purposes; normal office expenses, including phone, internet, and computer systems; attendance at key conferences or training sessions; and production of marketing materials. However, this Financial Plan does not focus on these day-to-day operational expenses since they are likely to be managed through FSW's normal purchasing arrangements, and they are less critical to launching RideConnect services.

Part 2 - Three-Year and First-Year Budget for RideConnect

The three-year budget that the JARC/NF grant and matching funds provides to FSW for the RideConnect program is approximately $990,000. Of this total, approximately 80 percent is to be paid by the federal government, with the remainder provided as match by Westchester County Department of Senior Programs & Services and FWS, in-kind. Over the course of the grant, approximately 75 percent of the total amount is expected to pay for fully-loaded personnel services, with the rest going toward a variety of Other-than-Personnel Services.

Table 1 shows the first-year budget that has been agreed to between FSW and the New York State Department of Transportation as part of the three-year JARC/NF grant. A total of $330,327 is budgeted, with nearly 80 percent to be paid from the federal government and 20 percent from a match provided by FSW via in-kind services. Fully-loaded personnel services are estimated to require 60% of the total, with the rest used for Other-than-Personnel Services.

Fully-Loaded Personnel Services

The first-year approved JARC/NF budget shows approximately 3.28 full-time equivalent (FTE) personnel. Of this amount, 0.78 FTE are to pay for some basic support that FSW provides to RideConnect, including 20 percent of a Senior Program Director (i.e., Rina Bellamy, the Director of My Second Home), as well as portions of personnel time from Information Technology, Finance, Human Resources, Marketing/Development, the Volunteer Coordinator and Continuous Quality Improvement (CQI).

The remaining first-year 2.5 FTE are divided among the following:

- Program Director – 1 FTE (Karen Ganis, the Program Director of RideConnect.)
- Mobility Coordinator – 0.75 FTE (Not yet hired. This position is assumed to have an annual salary of approximately $43,000.)
- Call Center Operator – 0.75 FTE (Not yet hired. This position is assumed to have an annual salary of approximately $30,000.)

In the Implementation Plan, we have recognized the crucial role of the Program Director and it has been identified as a full-time position that began November 1, 2010. The Implementation Plan also recognizes the importance of the Mobility Coordinator title in helping to set up and supervise the Call Center, as well as helping with coordination efforts. It calls for this person to be a .75 FTE in Year One and continue as 1 FTE in Years Two and Three. Finally, the Call Center Operator is identified in the Implementation Plan as a 0.5 FTE, given the likely start date as occurring midway into Year One. In each of Years Two and Three, the Implementation Plan identifies a second Call Center Operator (1 FTE).

Table 1: First-Year Budget for RideConnect

Position/Item	Salary	FTEs	JARC/NF Funds	Match
PERSONNEL SERVICES				
Senior Program Director	$74,360	0.20	$0	$14,872
Program Director	65,000	1.00	65,000	0
Mobility Coordinator	43,000	0.75	32,250	0
Call Center Operator	30,000	0.75	22,500	0
Volunteer Coordinator	56,000	0.10	0	5,600
IT	38,000	0.20	7,600	0
Finance	37,000	0.10	3,700	0
Continuous Quality Improvement (CQI)	98,000	0.02	0	1,960
Human Resources	77,620	0.05	0	3,881
Development/Marketing	60,000	0.11	0	6,600
Sub-Total Full Time		3.28	**$131,050**	**$32,913**
Fringe @ 19% & 25%			**$24,900**	**$8,228**
TOTAL PERSONNEL SERVICES			**$155,950**	**$41,141**
OTHER-THAN-PERSONNEL SERVICES (OTPS)				
Rent Expense			$8,250	$1,500
Consulting			10,000	15,000
Utilities			0	200
Office Supplies			1,200	0
Cellular Phones (2 cell phones @ $40/month)			960	0
Telephone & Internet			3,017	0
Mileage Reimbursement			2,800	840
Travel & Conferences			8,000	0
Insurance			2,500	2,500
Meeting Expense			2,000	0
Postage			2,000	0
Printing & Copying			3,500	2,000
Website			5,600	0
Marketing/Advertising			8,050	6,819
Furniture/Equipment			9,000	0
Auditing			2,500	0
Hardware & Software			35,000	0
TOTAL OTPS			**$104,377**	**$28,859**
TOTAL BUDGET			**$ 260,327**	**$70,000**

It is important that there be reconciliation between Implementation Plan staffing recommendations and JARC/NF budget realities. There are two factors to consider:

- First, timing of the expansion of the staffing from 1 FTE to a fully staffed Mobility Management program is directly related to the level, speed, and success that are achieved in the four overall coordination efforts that are citied in the Implementation Plan. Some may move faster than others; some may be deferred to Year Three; still others may not prove viable based on the interests of the various coordination partners.
- Second, funding, especially in Years Two and Three, is fungible and can be reallocated among positions. In addition, it is possible that Other-than-Personnel Services in Year One, Two, and/or Three may be less than anticipated, leaving funds available for staffing needs. Even in Year One, with a Call Center Operator not beginning until the midpoint of the year, there could be the potential to increase the Mobility Coordinator's effort from 0.75 to approximately 0.80 FTE. In Years Two and Three, the approximate loaded-salary budget available would likely pay for:
    - One FTE Mobility Coordinator throughout Years 2 and 3; and
    - Approximately 1.5 FTE in Year Two and 2 FTE in Year Three for the Call Center Operator title.

Key Direct Expense: Call Center Set-up

In the Implementation Plan, it is recommended that RideConnect utilize an "off-the-shelf" software and database system that is a basic requirement of the Call Center operations. The Implementation Plan identifies one vendor – RTM Designs – that has developed a suite of products designed specifically for organizations providing human service information and community assistance through call centers and the Internet. In fact, it has been utilized to create Mobility Management Call Centers in New York State, including the 211 system in Steuben County, NY. RTM Designs is not the only firm that provides this service, but its proven track record and *cost-effective* approach leads us to recommend that it be considered strongly by RideConnect as the software provider.

In January 2011, Howard/Stein-Hudson Associates (HSH) contacted RTM Designs. They provided a proposal for an "Internet-Based Resource Maintenance and Public Access System." RTM Designs' proposal is found in Appendix A. This document is not intended to be a formal proposal, since HSH was not attempting to represent the interests of FSW or RideConnect, but only requested the information to gain a sense of their costs. RTM Designs' proposal is based on the following understanding:

RTM Designs understands the software system objectives for the customer and is providing a solution for the following services and deliverables:

- Provide a complete ReferNET Information & Referral software system for use in the customer's Call Center for the purpose of searching and maintaining resource and call/client data.
- Provide a Web-based search engine that allows public access to the customer's resource database and tracks use statistics of all user activities. The Website is designed to the specifications of the customer.
- Provide a Web-based Agency Survey system that:
    - Automatically emails service providers for information updates
    - Provides a Web-based survey document to the service providers

    - Displays the service provider's completed survey
    - Stores completed surveys
- Provide printed directory functionality.
- Provide data conversion from the customer's existing software.
- Provide technical support for all software systems.
- Provide training for the ReferNET software system.

RTM Designs' costs for its services are estimated as the following:

- Year One costs: $5,000 for the system, plus up to $3,500 for training. (Less expensive training options are available – as low as $750 for a one-day webinar – though the $3,500 option provides on-site, training for three days.)
- Year Two costs: $4,500 for complete central hosted system.
- Year Three costs: $4,500 for complete central hosted system.

While the final costs of the RTM Designs' system (or anyone else's system, if another contractor is used) may differ from this initial estimate, the order of magnitude for this type of software system is far less than the projected JARC/NF budget estimate. This may allow RideConnect to devote more funding to personnel needs, marketing and education, or other important features.

Part 3 - Potential Funding for RideConnect Initiatives and Future Operations Funding

It is imperative that RideConnect begin to pursue other funding possibilities for two key reasons:

- There are likely to be initiatives that RideConnect and its coordinating partners may want to pursue over the next three years that will require outside funding efforts. Chief among these may be to support Voucher Programs described in the Implementation Plan, but there may be other efforts that involve funding for other programs such as coordinated municipal transportation services and volunteer driver programs.
- The three-year JARC/NF funding for RideConnect cannot be automatically renewed under current federal funding guidelines. Other sources of funding will be required. It is highly unlikely to expect state or county subsidization, nor would it be likely to propose some form of user fee for either Call Center patrons or coordinating partners. Instead, RideConnect will need to pursue other funding sources, including grants that are available from federal, state, county, and foundations.

In Appendix B a matrix of relevant funding sources is shown. The matrix identifies 35 distinct types of funding programs, including 10 from federal sources, 14 from state/county-administered programs (some of which utilize federal funding), and 11 from foundations or non-governmental organizations. The Appendix includes resources that may aid in the continued funding of RideConnect as it is now currently envisioned, as well as funding opportunities for partnerships or new programs that will be useful as RideConnect grows and strengthens relationships with other community-based organizations.

Within the Appendix B spreadsheet, some resources have **bolded text** below the title indicating that they are grant portals or sites with numerous, frequently updated grant opportunities and resources. In the list below, which summarizes the Appendix B spreadsheet, those entries are marked with an asterisk. It is recommended that these sites be monitored on an ongoing basis, as opportunities for various types of funding or in-kind support may become available in the future.

As noted, below is a summary of the relevant funding sources detailed in Appendix B. While this list is not exhaustive, it should provide a good starting point for connecting to valuable resources moving forward:

Federal

Job Access and Reverse Commute Program (5316)
United States Department of Transportation
Target Population: Low-income persons seeking to obtain or maintain employment
Potential Applications:

- Program operating expenses
- Consulting services
- Research
- Acquiring ITS tools
- Supporting a voucher program
- Promotion or marketing of a transit program

New Freedom Program (5317)
United States Department of Transportation
Target Population: Disabled persons
Potential Applications:

- New initiatives developed to grow and improve the program or overall operations
- Planning
- Technical assistance
- New volunteer programs
- Voucher programs
- Acquisition of equipment or staff to assist passengers in a new way

Over-the-Road Bus Program
United States Department of Transportation
Target Population: Persons seeking transit between cities on a fixed route; Over-the-Road Bus (OTRB) operators seeking to improve service to disabled patrons
Potential Applications:

- Could be used to fund the costs of a fixed route bus program for health aides commuting to and from Westchester

Formula Grants for Other than Urbanized Areas (5311)
United States Department of Health and Human Services Administration on Aging
Target Population: Residents of non-urban areas
Potential Applications:

- Capital, operating, administrative expenses for the service, as a project that meets the needs of a rural community
- Costs of running a transit program or route
  NOTE: Only applies to areas that are defined as "non-urban." Westchester County is too large to qualify, but all of the municipalities in Northeast Westchester may qualify.

US Dept. of Health & Human Services Administration on Aging Title III Grants*
United States Department of Health and Human Services Administration on Aging
Target Population: Elderly persons
Potential Applications:

- Varied; monitor frequently for updated grant postings

Supplemental Nutrition Assistance Program (SNAP) Employment and Training Program
United States Department of Agriculture
Target Population: Low-income persons receiving SNAP benefits
Potential Applications:

- Transit reimbursement for home health aide workers
- Partner programs with employment services organizations

Centers of Independent Living Programs*
United States Department of Education
Target Population: Disabled persons
Potential Applications:

- Grants could be used to fund a variety of initiatives (depending on grant), but can only be applied to partnerships with independent living centers in the state

Independent Living Services for Older Individuals Who Are Blind*
United States Department of Education
Target Population: Blind persons, elderly blind persons
Potential Applications:

- Grants could be used to fund a variety of initiatives (depending on grant), but can only be applied to partnerships with State Independent Living Centers or centers for visually impaired persons

United We Ride*
Federal Interagency Initiative
Target Population: Transit riders in general
Potential Applications:

- May be a resource for any projects that accomplish the goal of simplifying customer access to transportation, reducing duplication of transportation services, or improving the efficiency of services using existing resources
- Site has informational resources re: use of various federal funding sources, tools and best practices
- Specific funding opportunities may also become available on an ongoing basis

US Dept. of Housing and Urban Development Grants*
United States Department of Housing and Urban Development
Target Population: Typically low-income individuals
Potential Applications, based on FY2010 HUD Strategic Plan:

- Funding for programs that contribute directly to job creation for low-income residents of HUD-assisted housing (such as a transit program to assist low–income aide workers in commuting to Westchester)
- Data coordination efforts that integrate housing and community development data with data about outcomes such as health, education, safety, self sufficiency, transportation, and sustainability
- Programs that strengthen inter-agency partnerships which facilitate job creation or make jobs accessible to low-income individuals (funds could apply to a partnership with a HUD program focusing on job access, for example)

State/ County

Medicaid Title XIX Reimbursement Funds
New York Department of Health
Target Population: Low-income persons in need of medical care
Potential Applications:

- Transportation reimbursement partner programs with local senior centers or health care facilities

NY State Community Development Block Grant
New York State Office of Community Renewal
Target Population: Low- and moderate-income persons
Potential Applications:

- Funding could potentially apply to expansion or creation of transportation service for home health aide workers commuting to rural towns in Westchester
- Eligible recipients for NY State CDBG funding are non-entitlement villages, towns, cities or counties throughout New York State, excluding metropolitan cities, urban counties, and Indian Tribes that are designated Entitlement communities. Non-entitlement areas are defined as cities, towns, and villages with populations of less than 50,000 except those designated principal cities of Metropolitan Statistical Areas, and counties with populations of less than 200,000. *Note: Westchester County is too large to qualify, but all of the municipalities in Northeast Westchester may qualify.*

Section 5310 Grant Assistance Program
United States Department of Transportation
Target Population: Elderly persons, disabled persons, and the organizations that serve these populations
Potential Applications:

- Typically vehicle purchasing only; some states allow purchases of contracting services

Vocational and Educational Services for Individuals with Disabilities Grants*
New York State Education Department
Target Population: Disabled persons
Potential Applications:

- Monitor site for updated and specific grant opportunities
- May fund continuing operations

New York State Community Services Block Grants
New York State Developmental Disabilities Planning Council
Target Population: Low-income persons
Potential Applications:

- Transportation service for home health aide workers

New York State Developmental Disabilities Planning Council Grants*
New York State Developmental Disabilities Planning Council
Target Population: Disabled persons
Potential Applications:

- Funding for partner programs with agencies that serve the developmentally disabled populations

Temporary Assistance for Needy Families
New York State Office of Children and Family Services
Target Population: Low-income persons
Potential Applications:

- Transportation service for home health aide workers

Supportive Services and Senior Centers Program Grants
United States Department of Health and Human Services
Administration on Aging
Target Population: Senior citizens
Potential Applications:

- Partnership programs with adult day health centers and senior centers
- MMS funding as it provides information on transit access

Community Health Care Association of New York State Grants
Community Health Care Association of New York State
Target Population: Low-income persons
Potential Applications:

- Transit reimbursements for low-income individuals seeking health care
- Transportation aide staff
- May be restricted to low-income individuals

Rural Health Care Center Grants*
United States Department of Health and Human Services' Rural Initiative
Target Population: Medically underserved persons in rural areas
Potential Applications:

- Transit reimbursements for rural people seeking access to health care
  NOTE: Refer to link in spreadsheet to verify "rural" eligibility.

New York Department of Health Grants*
New York Department of Health
Target Population: Depends on grant
Potential Applications:

- Grant portal for state level health grants; will likely have ongoing new opportunities

Rural Transportation Assistance Program (RTAP) Grants
New York State Department of Transportation
Target Population: Rural transit areas
Potential Applications:

- Transit line driver training
- Volunteer training
- Technical assistance
- Research
  NOTE: Westchester County is too large to qualify, but all of the municipalities in Northeast Westchester may qualify.

NYS Office for the Aging*
The New York State Office for the Aging (the designated State Unit on Aging)
Target Population: Elderly persons, senior citizens
Potential Applications:

- Operating or program expenses, depending on grant
- Site should be monitored frequently for updated funding opportunities

Social Services Block Grants
United States Department of Health and Human Services
Target Population: Underserved populations, ultimately determined by state
Potential Applications:

- Operating expenses
- New programs or program extension
- Planning and consulting services
- Research

Foundations/Organizations

National Center on Senior Transportation*
National Partnership
Target Population: Senior citizens
Potential Applications:

- Funding from NCST could be applied to any project that accomplishes the goal of increasing coordination of transportation services for older adults, within the boundaries of the specific grant requirements
- Using technology to improve service
- Overall service improvements to existing transit options
- Increasing service coordination
- Volunteer recruitment
- Creating alternative funding mechanisms to allow community members to "sponsor" a ride
- Planning and research
- Operating expenses

United Hospital Fund*
Foundation
Target Population: Depends on grant
Potential Applications:

- Grants could provide operations funding
- Grants could apply to any new projects increasing access and quality of health care

National Association of States United for Aging and Disabilities*
National Organization
Target Population: Senior citizens, disabled persons
Potential Applications:

- This grant portal lists many open opportunities that may apply to future projects
- Funding may be used for operating expenses as well as capital expenses
- May apply to new programs or program improvements

Faith in Action Program*
Non-profit organization
Target Population: Homebound, disabled people and the organizations that serve them
Potential Applications:

- Volunteer acquisition and recruitment (in-kind support only)

American Council of the Blind, New York*
Local Chapter of a National Organization
Target Population: Blind persons, visually impaired people
Potential Applications:

- Vehicle acquisition: may be able to access donated vehicles through this group (in-kind support only)
- Partnership programs

Robert Wood Johnson Foundation*
Private Foundation
Target Population: Vulnerable populations, Americans in general
Potential Applications:

- Robert Wood Johnson Foundation grants are typically used to accomplish the Foundation's goal of improving the health and health care of all Americans
- Human Capital grants can be used to fund home health aide worker education
- Public Health, Quality/Equality and Vulnerable Populations grants can be used for general expansion and continuation funding

Kresge Foundation*
Private Foundation
Target Population: Poor, disadvantaged and marginalized individuals, families, and communities
Potential Applications:

- The Kresge Foundation awards grants to non-profit organizations in six fields of interest including health, community development, and human services
- Vouchers for home health aide worker transit
- Home health aide worker training
- Any program expenses that increase health access (may be limited by income of clients served)

Harry & Jeanette Weinberg Foundation*
Private Foundation
Target Population: Low-income people
Potential Applications:

- Goal of funding is to assist the poor - grants focus on meeting basic needs including nutrition, health, socialization, and enhancing an individual's independence
- Partner programs with senior centers that allow for socialization opportunities
- Actual transportation that allows for access to health care for low-income people

New York Community Trust and the Westchester Community Foundation (New York Community Trust suburban division)*
Private Foundation
Target Population: Low-income people; particularly interested in "hard to solve problems"
Potential Applications:

- Community Development projects
- Projects that center around health and people with special needs
- Providing NYC residents transportation to health care aide jobs (application would be strengthened through a partnership with an NYC-based organization, although grants are available in Westchester)

The Verizon Foundation*
Corporate Foundation
Target Population: Underserved people, persons with disabilities
Potential Applications:

- Projects that provide technology to help underserved populations and people with disabilities access information on critical health issues
- Innovative technology that helps health care providers increase their efficiency, effectiveness and reach
- Funding for initiatives involving communications technology or actual transportation to facilitate access to health care for elderly people
- Continuing operating expenses

Ford Foundation Metropolitan Opportunity Grants*
The Ford Foundation; Private Foundation
Target Population: Underserved people in urban areas
Potential Applications:

- Programs to connect city residents with opportunities in their broader metropolitan economies
- Home health aide worker transportation
- In-kind vehicle donations may also be available

Financial Plan

Appendix A – Preliminary Proposed Scope and Budget from RTM Designs for Call Center Set-up, Operation, and Training

Howard/Stein-Hudson Associates, Inc.
CREATIVE SOLUTIONS • EFFECTIVE PARTNERING ®

Proposal for an Internet-Based Resource Maintenance and Public Access System for Howard/Stein-Hudson Associates, Inc.

Submitted by:
RTM Designs
172 Highlands Square Drive, #301
Hendersonville, NC 28792
888-933-5052

January 21, 2011

. . . continually striving to help you help others

RTM Designs

ReferNET System Proposal
Integrated I&R Database System for

Howard/Stein-Hudson Associates, Inc.

1. Executive Summary

RTM Designs is pleased to submit to Howard/Stein-Hudson Associates, Inc. a proposal for an integrated information and referral software system.

RTM Designs has a 25-year history of developing Information & Referral, Volunteer Tracking, Case Management, Child Welfare and Juvenile Justice software. RTM Designs I&R software is used by more than 1600 human services organizations world-wide with over 3500 systems purchased since 1994.

2. Statement of Understanding

RTM Designs understands the software system objectives for the customer and is providing a solution for the following services and deliverables:

a) Provide a complete ReferNET Information & Referral software system for use in the customer's call center for the purpose of searching and maintaining resource and call/client data.

b) Provide a Web-based search engine that allows **public access** to the customer's resource database and tracks use statistics of all user activities. The Web site is designed to the specifications of the customer.

c) Provide a Web-based Agency Survey system that:

- Automatically emails service providers for information updates
- Provides a Web-based survey document to the service providers
- Displays the service provider's completed survey
- Stores completed surveys

d) Provide printed directory functionality.

e) Provide data conversion from the customer's existing software.

f) Provide technical support for all software systems.

g) Provide training for the ReferNET software system.

3. Software Proposal

3.1 ReferNET Software

RTM Designs proposes ReferNET software as the solution to your organizations software and service needs.

The ReferNET system provides:

- Resource, contact and client data searches for the customer's Call Center
- Resource data searches for the Public Access Web site
- Resource data updates for the Call Center
- Required Fields Processing
- Directory Production
- Volunteer Tracking
- Call/client data updates for the Call Center
- Call/Client Tracking
- On-Line Agency Survey system that allows service providers to monitor and update their resource information (optional)

ReferNET Hosted System:

RTM Designs hosts all software systems at the RTM Designs Data Center. All hardware and system maintenance costs are included. No additional hardware is needed at the customer's site. The RTM Designs Data Center provides 24/7 access to the customer's system via Microsoft Remote Desktop Connection with 99.9% guaranteed uptime. System Features include:

- No software purchase costs
- No additional tech support costs
- No hardware or IT costs to the customer
- System is available 24/7
- The software operates on the premier SQL Server version of ReferNET
- Instant data transfer to other ReferNET users for after-hours or emergency purposes
- Real-Time data displayed on the ReferNET system and the ReferWeb public access web site
- All resource and call/client data is available via download to the customer 24/7
- System backups, Geographic data maintenance and system maintenance is provided by the RTM Designs IT staff
- The highest level of data encryption supported by the customer's operating system. By default, Microsoft Terminal Services connections are encrypted at the highest level of security available (128-bit). Data encryption protects against the risk of unauthorized transmission interception on the link between the server and the customer.

3.2 ReferWeb Public Access to Resource Data

RTM Designs proposes ReferWEB as the Web-based software solution for the Public Access service provider database search engine. ReferWEB allows read-only public access searching of the central resource database. ReferWeb is hosted by RTM Designs ReferWeb customers usually link their ReferWeb site to their existing web site.

The ReferWEB system includes a comprehensive data tracking system that records all activities and entered data by users of the ReferWEB search engine. A Web-accessible reports interface is provided to the customer for on-line statistical reporting of the user statistical data. The ReferWEB graphical interface is custom designed for the customer and search functions are selected from the search system library.

3.3 On-Line Agency Survey System

RTM Designs proposes the On-Line Agency Survey module as the Web-based software solution managing on-line annual surveys for the customer. This system automatically emails survey notifications to service providers. An on-line survey document is presented to the service provider and changes can be made directly to this document.

The resource staff can search the update list, review any or all current updates, and post the changes to the database. These functions are accessible from within the ReferNET software.

3.4 Data Conversion

RTM Designs will convert the resource and call/client data from the customer's current I&R software. Most data conversion requires pre-conversion data clean up in order to enhance the quality of the final conversion. After data clean up, an initial conversion will be run for inspection by the customer's staff to validate the converted data. The final conversion will be performed to coincide with the customer's system switch date. Any needed modifications to the conversion program will be made prior to the final conversion.

3.5 Training (optional)

RTM Designs offers on-site training and facilitator hosted web training sessions. Training on the ReferNET software is schedule at the customer's request. RTM Designs provides the trainer, training materials, and software. Training options and prices vary, contact RTM Designs for details (888-933-5052).

3.6 Annual Technical Support

RTM Designs will provide annual tech support services for any of the customer's staff members. Annual Technical Support includes:

- Unlimited access to the RTM Designs tech support staff via Toll-Free phone and email (M-F 8:30- 5:00pm EST)
- All system updates
- A personal ftp site for the use of the customer's staff members

3.7 System Requirements:

Recommended Operating System requirements:

- Windows XP with Service Pack 3 or Windows Vista with Service Pack 1
- Microsoft.Net Framework 3.5

Minimum Operating System requirements:

- Windows 2000

Requires Membership with 211 LA County Taxonomy

- If you do not have a membership, please contact 211 LA County Taxonomy: Website: www.211taxonomy.org, Phone: (626) 350-1841 ext. 2518, Email: taxonomy@211LA.org

Required Application:

- Microsoft Remote Desktop Connection
- RTM Designs ScrewDrivers Client v4 Universal Print Driver
  For the download and instructions go to: www.refersoftware.com/print

  Please consult with your IT staff regarding your organization's policy for downloading and installing software to your workstations.

Recommended Connectivity:

- Minimum Bandwidth of 1.5meg from your internet service provider

Note: Constantly accessing any business application via Remote Desktop Connection will affect bandwidth usage. In addition, bandwidth usage will fluctuate according to the number of users, number of calls processed and the amount of internal internet usage, such as email.

Warning! Processes such as video streaming, audio streaming, viewing news channels and general internet searching will significantly reduce your available bandwidth for applications such as Remote Desktop Connection.

3. Proposal Cost Options

ReferNET Complete Central Hosted System

ReferNET Central Hosted System	**$4,500.00**
ReferWeb Public Access System with Statistical Reporting	
ReferWeb Agency Survey System	
ReferNET Tech support and system upgrades	

One-Time Licenses and Set-up Fee *

(Includes 15 user licenses)	**$500.00**

Additional Optional One-time Fees*

Data Conversion (Resource and Call/Client data)	**$NA**
Training Options on Request	**Prices Vary**

Optional Software Module

ReferWeb Agency Survey System	**$2,00.00 Annual**
Complete System Annual Recurring Fee	**$4,500.00**

*** One-time Fee**

5. Company Information

Main Office: RTM Designs
172 Highlands Square Dr. #301
Hendersonville, NC 28792
(864) 224-2117 FAX: (864) 224-2523
www.rtmdesigns.com
Owner: Linda N. Ross
Years in Business: Since 1994

RTM Designs Training Options

On-Site Training (includes facilitator travel expenses):

3-Day On-site	$3,500.00
2-Day On-site	$2,700.00
1-Day On-site	$2,200.00

Facilitator Hosted Webinar Training:

3-Day Webinar	$2,250.00 for one inbound phone line
2-Day Webinar	$1,500.00 for one inbound phone line
1-Day Webinar	$ 750.00 for one inbound phone line
Hourly Webinar	$ 90.00 per hour for one inbound phone line

Note* additional inbound phone lines may be added for a fee of $20.00 per hour for each additional inbound phone line

Training at the RTM Designs office:

3-Day RTM Designs	$2,000.00
2-Day RTM Designs	$1,400.00
1-Day RTM Designs	$ 700.00

All training must be booked in advance and will be subject to availability.

Financial Plan

Appendix B – Potential Funding Sources

Howard/Stein-Hudson Associates, Inc.
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Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Federal Govt.										
Job Access and Reverse Commute Program (5316)	US Dept. of Transportation		http://www.fta.dot.gov/funding/grants/grants_financing_3550.html	3-year grant	States and public bodies Private non-profit organizations State or local governments Operators of public transportation services including private operators of public transportation services	To address the unique transportation challenges faced by welfare recipients and low-income persons seeking to obtain and maintain employment	Low-income persons seeking to obtain and maintain employment	Requires funding matches Projects must be derived from a locally developed, coordinated public transit-human services transportation plan	Capital, planning and operating expenses for projects that transport low-income individuals to and from jobs and activities related to employment Reverse commute projects	Program operating expenses Program extension Consulting services Research Acquiring ITS tools Supporting a voucher program Promotion or marketing of a transit program
New Freedom Program (5317)	US Dept. of Transportation		http://www.fta.dot.gov/funding/grants/grants_financing_3549.html	3-year grant	States and public bodies Private non-profit organizations State or local governments Operators of public transportation services including private operators of public transportation services	To provide additional tools to overcome existing barriers facing Americans with disabilities seeking integration into the work force To reduce barriers to transportation services and expand the transportation mobility options available to people with disabilities	Disabled persons	Funds may be used to finance capital and operating expenses Requires funding matches	Capital and operating expenses for **new** public transportation services and new public transportation alternatives designed to assist individuals with disabilities	New initiatives developed to grow and improve the program Planning Technical assistance New volunteer programs Voucher programs Acquisition of equipment or staff to assist passengers

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Over-the-Road Bus Program	US Dept. of Transportation	Section 3038 of the Transportation Equity Act for the 21st Century as amended (SAFETEA-LU)	http://www.fta.dot.gov/funding/grants/grants_financing_11856.html	3-year grant	Operators of buses used substantially or exclusively in intercity, fixed route, over-the-road bus service	To assist OTRB operators in complying with the Department's Accessibility regulations	Persons seeking transit between cities on a fixed route OTRB operators seeking to improve service to disabled patrons	Requires funding matches: 90 % federal funds requiring 10% local funding match	Inter-city, fixed route, over-the-road bus service programs Capital projects such as adding lifts and other accessibility components to new vehicle purchases Training costs such as developing training materials or providing training for local providers of over-the-road bus services	Development of a fixed route bus program for health aides Improvements to existing bus programs
Formula Grants for Other than Urbanized Areas (5311)	US Dept. of Transportation		http://www.fta.dot.gov/funding/grants/grants_financing_3555.html	3-year grant	State that receives a Federal transit program grant directly from the Federal Government State or local governmental authority Non-profit organization Operator of public transportation or intercity bus service that receives federal transit program grant funds indirectly through a recipient The Formula Grants For Other than Urbanized Areas is a formula based rural program that provides funding for the purpose of supporting public transportation in rural areas (areas with population of less than 50,000)	Enhance the access to health care and other services Assist in the maintenance, development, improvement, and use of public transportation systems Encourage and facilitate coordination of programs and services Assist in the development and support of intercity bus transportation Provide for the participation of private transportation providers in non-urbanized transportation	Residents of non-urban areas (Towns with a population of less than 50,000 may be eligible)	Requires funding matches: 80 % federal funds requiring 20% local funding match Focused on non-urban areas and riders	Capital, operating, and administrative expenses for public transportation projects that meet the needs of rural communities	Capital, operating, administrative expenses for running a transit program Operational expenses of coordination efforts such as the Mobility Management System (MMS) call center

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Title III Grants 2011 Opportunities not yet posted **Grant Portal (numerous grants)**	US Dept. of Health and Human Services Administration on Aging	Title III - B; Older Americans Act	http://www.aoa.gov/AoARoot/Grants/index.aspx http://www.hhs.gov/grants/		Depends on grant	To serve a growing senior population through funding services that provide the means by which many more seniors can maintain their independence	Elderly persons	Depends on grant	Depends on grant	Depends on grant
Supplemental Nutrition Assistance Program (SNAP) Employment and Training Program	US Dept. of Agriculture		http://www.fns.usda.gov/fns/grants.htm http://www.fns.usda.gov/snap/rules/Memo/Support/employment-training.htm http://www.clasp.org/admin/site/documents/files/CWF_SNAP-ET.pdf		States and partner organizations collaborating on SNAP E & T programs	To support a variety of education, training, employment, and related services for SNAP recipients	Low-income persons receiving SNAP benefits		Typically reimbursement or payment of travel expenses (gas, bus fares) that allow access to employment training and employment places	Transit reimbursement for workers Partner programs with employment services organizations
Centers of Independent Living Programs **Grant Portal (numerous grants)**	US Dept. of Education	Sec. 725 of the Rehabilitation Act	http://www2.ed.gov/programs/cil/index.html http://www2.ed.gov/programs/cil/awards.html http://www2.ed.gov/programs/cil/applicant.html#84132a http://www.nysilc.org/directory.htm	Varied	Non-profit agencies	To support centers for independent living To fund core services of information and referral, independent living skills training, peer counseling, and advocacy	Disabled persons	Project must be part of a plan to increase independent living options for persons with disabilities	Referral services Independent living skills training Peer counseling Advocacy	Partner programs with independent living centers in NY: http://www.vesid.nysed.gov/lsn/ilc/locations.htm

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Independent Living Services for Older Individuals Who Are Blind **Grant Portal (numerous grants)**	US Dept. of Education		http://www2.ed.gov/programs/rsailob/index.html		States State vocational rehabilitation agencies	To provide independent living services to older individuals who are blind To conduct activities that will improve or expand services for these individuals To conduct activities to improve public understanding of the problems facing these individuals	Blind persons	Depends on grant	Depends on grant	Partner programs with state independent living centers and/or centers for visually impaired persons
United We Ride **Grant Portal (many grants available)**	United We Ride and partner funding sources (varied)	United We Ride (UWR) is a federal interagency initiative	http://www.unitedweride.gov/1_3_ENG_HTML.htm http://www.unitedweride.gov/1_5_ENG_HTML.htm	Varied	Depends on grant	To simplify customer access to transportation To reduce duplication of transportation services To improve the efficiency of services using existing resources	Transit users in general		Anything that accomplishes purposes of funding may qualify	Informational resources re: use of various federal funding sources, tools and best practices Specific funding opportunities may also become available on an ongoing basis

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
United States Dept. of Housing and Urban Development Grants **Grant Portal (many grants available)**	US Dept. of Housing and Urban Development		http://portal.hud.gov/hudportal/HUD?src=/program_offices/administration/grants/fundsavail	Varied	Non-profit organizations Community groups	Depends on grant	Typically low-income individuals	Grantee must register with the Grants.gov website Specific requirements depend on grant	HUD funding priorities are closely tied to the agency's Strategic Plan. In general, funds can be used for programs that benefit low-income individuals (such as job creation/access), but the HUD website must be consulted for updates. Usage may also depend on grant.	Transportation for aide workers (to alleviate poverty)
State or Local										
Medicaid Title XIX	Medicaid (Federal Program) via New York Dept. of Health	Title XIX: Title XIX of the Social Security Act provides for federal grants to the states for medical assistance programs	http://www.health.state.ny.us/funding/		Low-income persons	To allow states to furnish medical assistance to those who have insufficient incomes to meet the costs of care To fund services to help these families and individuals become or remain independent	Low-income persons in need of medical care	Low-income people only	Efforts that increase access to healthcare services	Transportation reimbursements Reimbursement partner programs with local senior centers or health care facilities

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
NYS Community Development Block Grant	The Office of Community Renewal administers the Community Development Block Grant (CDBG) program for the State of New York		http://www.dhcr.state.ny.us/Programs/NYS-CDBG/Funding.htm	Varied	Eligible recipients for NY State CDBG funding are non-entitlement areas: cities, towns, and villages with populations of less than 50,000 except those designated principal cities of Metropolitan Statistical Areas, and counties with populations of less than 200,000. Westchester County is too large to qualify, but all of the municipalities in Northeast Westchester may qualify.	To support projects that: benefit low- and moderate-income families; create job opportunities for low- and moderate-income persons; prevent or eliminate slums and blight; or address a community development need that poses a serious and imminent threat to the community's health or welfare	Low- and moderate-income persons	No less than 70% of funds must used for activities that benefit low- and moderate-income persons	General; as stated in purpose of grant	Funding could potentially apply to expansion or creation of transportation service for aide workers commuting to rural towns in Westchester
Section 5310 Grant Assistance Program	Federally Funded (US DOT)	5310	https://www.nysdot.gov/divisions/policy-and-strategy/public-transportation/specialized-transportation/5310	In 2009$9.307 million was divided between 88 NY state orgs	Non-profit organizations that serve elderly individuals or individuals with disabilities (primary applicant) Public bodies (i.e. municipalities, County level governments) which certify that no non-profit organizations are available in the area to provide these services or that is approved by the State to coordinate services for elderly individuals and individuals with disabilities	To provide non-profit organizations assistance in the purchase of vehicles to meet the specialized transportation needs of elderly individuals and individuals with disabilities	Elderly persons Disabled persons Organizations that serve these populations	Requires funding match: 80% federal dollars requiring a 20% local match No operating funds provided Recipients are responsible for 100% of their ongoing operating expenses for buses awarded	Vehicle purchasing	Typically vehicle purchasing only; some states allow purchases of contracting services
Vocational and Educational Services for Individuals with Disabilities Grants **(numerous grants)**	New York State Education Dept.		http://www.vesid.nysed.gov/grant_procurement_opportunities/about.htm	Depends on grant	Depends on grant	To support: Referral aid Access to services Access to public transit	Disabled persons	Depends on grant	Any efforts that relate to the purpose of funding	See link for updated and specific grant opportunities May fund MMS operations

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
NYS Community Services Block Grants	Federal funds are provided to New York State, which distributes and administers those funds to a statewide network of local organizations.	This is a federal program created by Congress in 1981 for the purpose of alleviating poverty nationwide.	http://www.dos.state.ny.us/dcs/index.htm http://www.recovery.ny.gov/resources/Federal_Grant_Opportunities.htm	Depends on grant	Community action agencies (CAAs) Community action programs (CAPs) Public organizations Community based organizations	To reduce poverty To revitalize low–income communities To empower low-income families and individuals to become economically self–sufficient and self–reliant	Low-income persons	Depends on grant	Any efforts that relate to the purpose of funding	Transportation service for aide workers
NYS Developmental Disabilities Planning Council Grants **(numerous grants)**	New York State Developmental Disabilities Planning Council		http://ddpc.ny.gov/Pages/requests_for_proposal.html	Depends on grant	Depends on grant	To improve the delivery of services and supports to New Yorkers with developmental disabilities and their families To focus on community involvement, employment, recreation and housing issues	Disabled persons	For services to disabled persons	Any efforts that relate to the purpose of funding	Funding for partner programs w/ agencies that serve the developmentally disabled populations
Temporary Assistance for Needy Families (TANF) - Grants to comply the *Personal Responsibility and Work Opportunities* requirements	New York State Office of Children & Family Services		http://www.ocfs.state.ny.us/main/bcm/default.asp http://www.fta.dot.gov/funding/grants/grants_financing_3715.html			To fund programs that accomplish the goals of TANF	Low-income persons	States determine specifics	Any efforts that relate to the purpose of funding	Transportation for low-income aide workers

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Supportive Services and Senior Centers Program Grants	US Dept. of Health and Human Services, Administration on Aging	Section 321 of the Older Americans Act of 1965, as amended	http://www.aoa.gov/AoARoot/AoA_Programs/HCLTC/supportive_services/index.aspx http://www.aoa.gov/AoARoot/Grants/index.aspx	Depends on grant	States State programs Senior centers providing multi-purpose services	To enable seniors to remain in their homes for as long as possible	Senior citizens	Formula grant based on population Local area agencies on aging have the flexibility to use their funds to provide the supportive services that best meet the needs of seniors in their planning and service areas	Any services that increase senior independence: Access services such as transportation, case management, and information and assistance In-home services such as personal care, chore, and homemaker assistance Community services such as legal services, mental health services, and adult day care Operations of multi-purpose senior centers/programs	Partnership programs w/ adult day health centers and senior centers MMS or call center funding as it provides information on transit access
Community Health Care Association of NYS Grants	Community Health Care Assoc. of New York State	Public Health Service Act, as amended	http://www.chcanys.org/index.php?submenu=chcsupport&src=gendocs&ref=CHCSupport&category=Main http://www.hhs.gov/recovery/programs/hrsa/newyork.html	Varied	Community health centers and their (typically low-income) clients	To support community health centers and health program access	Low-income persons	Depends on grant	General support of health care center	Transit reimbursements for low-income individuals seeking health care access Transportation aide staff May be restricted to low-income individuals

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Rural Health Care Center Grants **Grant Portal (numerous grants)**	Rural Assistance Center; Rural Health Care Network via US Dept. of Health and Human Services' Rural Initiative		http://www.raconline.org/funding/funding_state_details.php?state=NY http://www.raconline.org/funding/		Rural transportation providers who work in formal partnerships to integrate administrative, clinical, technological, and financial functions Visit this website to verify "rural" eligibility: http://www.raconline.org/funding/rural.php	To expand access to, coordinate and improve the quality of health care services To enhance the delivery of health care in rural areas	Medically underserved persons in rural areas	Not for direct delivery of services Ultimate goal is to strengthen the rural health care delivery system by improving the viability of the individual providers in the network and/or improving the delivery of care to people served by the network	Increase healthcare access for rural patients	Transit reimbursements for rural people seeking access to health care
New York Dept. of Health Grants **Grant Portal (many grants available)**	New York Dept. of Health via federal sources	Varied	Grants portal: http://www.health.state.ny.us/funding/	Varied	Depends on grant	Depends on grant	Depends on grant	Depends on grant	Depends on grant	Grant portal for state level health grants; will likely have ongoing new opportunities
Rural Transportation Assistance Program (RTAP) Grants	New York State Dept. of Transportation		https://www.nysdot.gov/divisions/policy-and-strategy/public-transportation/rural-programs/rtap	Varied	States, local governments, and providers of rural transit services (population under 50,000) Westchester County is too large to qualify, but all of the municipalities in Northeast Westchester may qualify.	To provide training and technical assistance to rural transportation operators	Rural transit areas	No funding match requirement	States may use RTAP funds to support non-urbanized transit activities in four categories: training, technical assistance, research, and related support services	Transit line driver training Volunteer training Technical assistance Research

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
NYS Office for the Aging **Grant Portal (several grants)**	The New York State Office for the Aging (the designated State Unit on Aging)	Older Americans Act of 1965, as amended	http://www.aging.ny.gov/FundingOpportunities/Index.cfm	Varied		To help older New Yorkers to be as independent as possible To support programs and services which support and empower the elderly and their families	Elderly persons, senior citizens	Depends on grant	Any efforts that relate to the goals and purpose of funding	Program expenses, depending on grant Site should be monitored frequently for updated funding opportunities

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Social Services Block Grants (State)	US Dept. of Health and Human Services	Title XX	http://www.acf.hhs.gov/programs/ocs/ssbg/ http://www.health.state.ny.us/funding/	Depends on grant	States receive federal funding States then distribute	To fund services such as: Daycare for children or adults Protective services for children or adults Special services to persons with disabilities Health-related services Transportation Home-delivered meals Independent and transitional living Employment services	Underserved populations Ultimately determined by state	Funds may be used to provide services directed toward one of the following goals: To prevent, reduce, or eliminate dependency To achieve or maintain self-sufficiency To prevent neglect, abuse, or exploitation of children and adults To prevent or reduce inappropriate institutional care To secure admission or referral for institutional care when other forms of care are not appropriate	To assist service providers in a variety of needs, including transportation	MMS operating expenses New programs or program extension Consulting services Research

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Foundations & Organizations										
National Center on Senior Transportation (NCST) **Grant Portal (many grants available)**	US Dept. of Transportation, Federal Transit Administration NCST is administered by Easter Seals Inc. in partnership with the National Association of Area Agencies on Aging		http://seniortransportation.easterseals.com/site/PageServer?pagename=NCST2_about_projects http://www.n4a.org/about-n4a/?fa=aaa-title-VI	$35,000 - $90,000 Depends on grant	Transit providers Human services providers Public and private agencies Non-profits	To identify, and facilitate the adoption of effective and innovative community approaches for addressing older adult mobility	Senior citizens	Project must increase coordination of transportation services for older adults Grantees must adopt 1 or more of these goals: increase transportation options for older adults, simplify older adults' access to transportation services, and/or to increase the quality of transportation services for older adults	Anything that meets general requirements listed	Using technology to improve service Overall service improvements Increasing service coordination Volunteer recruitment Creating alternative funding mechanisms to allow community members to "sponsor" a ride Planning and research
United Hospital Fund Grants **Grant Portal (many grants available)**	United Hospital Fund; Foundation		http://www.uhfnyc.org/grants	$2 million annually in grants and general support	Non-profit and public hospitals Nursing homes Health care organizations	To fund development of model projects To sponsor research to analyze systemic problems To foster innovative solutions	Depends on grant	Depends on grant	Anything that accomplishes purposes of funding may qualify	MMS funding Any projects increasing access and quality of health care
National Association of States United for Aging and Disabilities (NASUA) **Grant Portal (many grants available)**	NASUA	National Group	http://www.nasuad.org/about_nasuad/about_nasuad.html http://www.nasuad.org/affordable_care_act/grant_opportunities.html	Varied	Depends on grant	Depends on grant NASUA exists: to design, improve, and sustain state systems delivering home and community based services and supports for people who are older or have a disability, and their caregivers	Senior citizens Disabled persons	Depends on grant	Capital expenses Training Program development Program expansion	This grant portal lists many open opportunities that may apply to future projects MMS operations funding Program improvements

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Faith in Action Program **(various opportunities)**	Non-profit organization		http://www.nysilc.org/directory.htm http://www.fianationalnetwork.org/what-is-faith-in-action.cfm http://www.fianationalnetwork.org/resources/resources.cfm		Non-profit organizations	To promote volunteer care giving programs in all communities	Homebound, disabled people and the organizations that serve them	In-kind support only	Volunteer recruitment	Volunteer recruitment
American Council of the Blind, New York **(various opportunities)**	Consumer organization		http://www.acbny.webs.com/		Non-profit organizations serving blind people	To advocate for the visually impaired: New York's largest consumer organization of and for people who are blind or visually impaired	Blind persons, visually impaired people	Priority of service to blind persons	Vehicle acquisition	May be able to access donated vehicles through this group for any future projects
Robert Wood Johnson Foundation **(many grants available)**	Private Foundation		http://www.rwjf.org/grants/		Non-profit organizations	The mission of the Robert Wood Johnson Foundation is to improve the health and health care of all Americans	Vulnerable populations Americans in general	Depends on grant	Worker training Program expenses	Human Capital grants can be used to fund aide worker education Public Health, Quality/Equality and Vulnerable Populations grants can be used for general program expansion and continuation

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
Kresge Foundation **(many grants available)**	Private Foundation		http://www.kresge.org/index.php/our_grants/index/	Depends on grant	Non-profit organizations	The Kresge Foundation awards grants to small, mid-size, and large non-profit organizations in six fields of interest including health, community development, and human services	Poor, disadvantaged and marginalized individuals, families, and communities	Depends on grant	Varied, within the program areas of the foundation as listed	Vouchers for worker transit Aide worker training Any program expenses that increase health access
Harry & Jeanette Weinberg Foundation **(many grants available)**	Private Foundation		http://www.hjweinbergfoundation.org/grants/eligibility.php	Depends on grant	Non-profit organizations	To assist the poor - grants focus on meeting basic needs including nutrition, health, socialization, and enhancing an individual's independence	Low-income people	Depends on grant; may be restricted to low-income individuals	Varied, within the program areas of the foundation as listed	Partner programs with senior centers that allow for socialization opportunities Actual transportation that allows for access to health care for low-income people
New York Community Trust, and Westchester Community Foundation (New York Community Trust suburban division) **(many grants available)**	Private Community Foundation		http://www.nycommunitytrust.org/DefaultPermissions/GrantSeekers/tabid/202/Default.aspx http://www.wcf-ny.org/	Depends on grant	The Trust makes grants primarily to non-profit organizations located in the five boroughs of New York City. Suburban divisions of the Trust handle grants on Long Island and in Westchester. Grants for programs outside this area are generally from funds designated for specific charities or have been made at the suggestion of donors.	To contribute to overall community betterment in the New York City area	Low-income people; particularly interested in "hard to solve problems"	May have location restrictions	Community Development projects Health and projects involving people with special needs	Providing NYC residents transportation to health care aide jobs (partnership with an NYC based organization would strengthen application, although grants are also available in Westchester)

Grant Name	Funding Source	Funding Legislation	Link	Grant Size	Eligible Recipients	Purpose of Funding	Target Population	Restrictions & Requirements	Potential Grant Uses (General)	Potential Grant Uses for Project
The Verizon Foundation **(many grants available)**	Corporate Foundation		http://foundation.verizon.com/core/health.shtml	Depends on grant	Non-profit organizations	To facilitate general community improvement in several areas, including access to healthcare	Underserved people Persons with disabilities	Depends on grant	Projects that provide technology to help underserved populations and people with disabilities access information on critical health issues Innovative technology that helps healthcare providers increase their efficiency, effectiveness and reach	Funding for initiatives involving communications technology and/or actual transportation to facilitate access to health care for elderly people Potentially for MMS operating expenses
Ford Foundation Metropolitan Opportunity Grants **(several grants within this category)**	Ford Foundation; Private Foundation		http://www.fordfoundation.org/issues/metropolitan-opportunity	Depends on grant	Non-profit organizations	Metropolitan Opportunity Grants support: equitable access to safe, affordable housing, efficient transportation, and good jobs	Underserved people in urban areas	Depends on grant	Programs to connect city residents with opportunities in their broader metropolitan economies	Aide worker transportation In-kind vehicle donations may also be available

Marketing & Education Plan

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Prepared for
Westchester County Department of Public Works and Transportation

Prepared by
Howard/Stein-Hudson Associates, Inc.

February 2011

Howard/Stein-Hudson Associates, Inc.
CREATIVE SOLUTIONS • EFFECTIVE PARTNERING ®

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Importance of Marketing

Recently branded as RideConnect, effective marketing of the Mobility Management System is necessary to maximize its visibility and benefit to the public. The main focus of this Marketing and Education Plan will be on the Call Center operations.

Targeted Markets

Identifying targeted markets is essential to a successful marketing campaign. RideConnect's initial marketing efforts should primarily focus on the following groups:

- Senior citizens and disabled individuals who reside in Northeast Westchester and face transportation challenges;
- Transportation providers serving Northeast Westchester County; and
- Home health care agencies and their workers who reverse commute to Northeast Westchester.

RideConnect should also eventually consider the following secondary groups that represent the interests of primary markets:

- Community Services and Organizations – linked to residential market
- Northeast Westchester Resident Destinations (including medical facilities, shopping centers, and recreational centers) – linked to residential market
- Northeast Westchester Employers – linked to commuter market

Key Messages

In all marketing efforts, RideConnect should seek to convey the following key messages that support RideConnect's mission:

- Ease of use
- Quality and reliability of information
- Reasonable alternative modes of transportation **DO** exist in Northeast Westchester

Responsibilities

Marketing management and oversight will be a key responsibility of RideConnect's Program Director. The process should also involve the Northeast Westchester Mobility Advisory Council. Ongoing discussions about marketing opportunities and evaluations of marketing initiatives should take place at Council meetings. A specific Council working group could be assigned the task of marketing management for RideConnect.

Developing the RideConnect Brand

Developing a logo for RideConnect will be essential for providing visual recognition of the service to targeted markets. A logo will serve as a basis for the RideConnect brand and should graphically reinforce the key messages discussed earlier. It should include the RideConnect name, call-in number, website address, and identifying graphic(s) and colors. Developing a logo should happen early in the process of establishing the Call Center, preferably by a graphic designer. It will serve as a foundation for developing other branded graphics, including brochures, newsletters, advertisements, and a website. A logo will also provide a credible identity for RideConnect and will be essential when marketing the Call Center to both individuals and organizations.

Below are examples of logos of call-in centers and demand-responsive transportation service providers:

Disseminating Information

A variety of media should be used to disseminate information about RideConnect in order to reach different audiences:

Initial Activities:

- **Quarterly Newsletter:** RideConnect should publish a quarterly newsletter to provide information and updates about RideConnect's goals, the Call Center, and transportation options in the area. The newsletter would be directed to cooperating agencies and organizations, area employers, community organizations, RideConnect users, and potential customers. An electronic version of the newsletter should also be produced, and RideConnect should encourage cooperating organizations and agencies to post the newsletters on their respective websites.
- **Website:** RideConnect should contact relevant transportation-related websites focused on the Northeast Westchester area in order to ensure that the RideConnect website is linked to

other important resources on the web (including 211hudson.org, 511ny.org, and seniorcitizens.westchestergov.com).

Media to Be Used as RideConnect Develops:

- **Press Releases:** These should be issued to announce the opening of the Call Center and any significant events or changes in services.

- **Brochures:** A brochure incorporating the RideConnect brand and providing an overview of RideConnect services should be created. Brochures should be mailed to area employers, medical facilities, and community organizations and distributed at outreach events. Brochures could also be included in municipality mailings to residents (for example, with municipal tax bill mailings).

- **Business Card Advertisements:** A RideConnect business card with basic information about the Call Center could be printed and distributed to a variety of facilities in the area, including hospitals, libraries, and community centers. RideConnect could work with these facilities to ensure distribution of the cards to visitors. Business card advertising is the primary promotional tool used by Hudson Valley 211.

- **Advertisements in Printed Publications:** Advertisements about RideConnect should be periodically placed in local newspapers to inform residents about the Call Center. RideConnect advertisements could also be included in newsletters and publications distributed by cooperating organizations, community groups, religious groups, etc.

- **Public Service Announcements:** Public service announcements can be used to advertise RideConnect's services on television and on the radio.

Outreach

Direct outreach to relevant businesses and organizations should be a priority in order for information about RideConnect to be passed on to their customers and constituents. Outreach can take place in the form of phone conferences, in-person meetings, and presentations. Outreach activities should be targeted at the following groups in the Northeast Westchester area:

- **Transportation Providers:** RideConnect call referrals are dependent on organizations in the area that provide transportation services. It is important to discern how these services can be incorporated most effectively into RideConnect's program, and to let transportation providers know that RideConnect can provide them with customers.
- **Resident Destinations (includes medical facilities, shopping centers, and recreational centers):** It is necessary to reach out to these destinations in order to inform them about how RideConnect can provide transportation services to residents using their facilities.
- **Community Resources & Organizations (includes 211 Hudson Valley, 511NY, DMV, Social Security offices, AARP, local senior centers, religious groups, advocacy organizations, etc.):** Outreach to community resources and organizations will provide them with information about RideConnect's goals and services, which can be passed on to their constituents and members.

- **Employers:** For consideration at an appropriate time in the future, reaching out to employers in the area will encourage employers to inform staff about using RideConnect as a potential resource for commuting options for those who have transportation challenges.

Outreach to the groups above will also allow RideConnect to solicit feedback about their services. Feedback can be used to direct future initiatives and marketing messages.

Market Research

Market research is important in order for RideConnect to understand:

- Who is using (and not using) RideConnect?
- Are RideConnect customers satisfied?
- What additional services do customers desire?

Market research can be conducted in the ways discussed below in order to answer the questions above.

- **Customer demographic data collection:** Basic demographic data, such as age, retirement/employment status, and location, could be collected when a customer calls RideConnect. Collected data can be used to generate statistics about attributes of RideConnect callers.

- **Customer satisfaction surveys:** An opt-in automated survey could be set up for callers or website users to evaluate their experience with RideConnect. Callers would be asked if they would like to participate at the beginning of their call, and the survey questions would be asked after a RideConnect staff member has assisted the caller. For website users, questions could be asked at the end of the interaction or incorporated into the series of questions that are asked during the interaction.

- **Independent surveys of Northeast Westchester residents:** RideConnect could partner with wide-reaching organizations in the Northeast Westchester area, such as AARP New York or Westchester Senior Services, to administer a survey of residents about their transportation needs and awareness of RideConnect. The survey could be included in mass mailings sent out by the sponsoring organization, or it could be conducted by phone with a random sample or residents.

- **Customer focus groups:** Focus groups composed of customers could be used to conduct more detailed analysis about RideConnect's services. Focus groups engage a small sample of customers, but allow for greater depth of evaluation. Customers would be given the opportunity to describe their experience with RideConnect, evaluate current services, and propose improvements. Additionally, holding focus groups would reinforce the value placed on customer input by RideConnect.

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Final Report - Appendix 1

Technical Memorandum #1: Demographic Analysis and Inventory of Transportation Services

Howard/Stein-Hudson Associates, Inc.
CREATIVE SOLUTIONS • EFFECTIVE PARTNERING ®

Westchester County Department of Transportation

Westchester County Department of Senior Programs and Services

Design of a Demand Responsive Transportation Service for Northeast Westchester County

Technical Memo #1

Demographic Analysis and Inventory of Transportation Services

May 2010

Prepared by:

TranSystems

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Appendix A: Key Destinations for Target Populations in Northeastern Westchester County

Introduction

This study was undertaken in response to a desire to address the mobility needs of older adults, persons with disabilities, persons with low incomes, and others in the seven communities that makeup northeastern Westchester County.

The objective of the study is to formulate a design for a call center, coordinated transportation services, and new demand responsive transportation service, and develop detailed financial, implementation, and marketing/media plans to guide the system's creation. This memo presents the information collected as a result of the first step toward that goal and includes an analysis of project area demographics, an inventory of available transportation services, and a discussion of gaps in service.

Project Area Demographic Characteristics

Westchester County is located just north of New York City, also bordered by the Hudson River, Putnam County, Connecticut, and the Long Island Sound. The project area is located in the northeastern corner of Westchester County, encompassing the Village/Town of Mount Kisco and the towns of Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, and Somers.

Table 1 presents the demographic data discussed in this section. Data for this table was obtained from both the U.S. Census Bureau and Westchester County's Databook for 2008. Total area refers to both land and water area.

Population and Population Density

Overall, the County is one of the most populous in the state, with an estimated 953,943 total residents in the year 2008. Only the counties making up New York City and its burroughs, Long Island, and Erie County (Buffalo) were more populous. It is also one of the densest counties in New York, with over 2,000 persons per square mile.

The population of the study area communities totaled 79,354 in 2000. In contrast to Westchester County, the area is not densely populated; all of the communities except Mt. Kisco had densities of 226 to 569 persons per square mile in 2000. Mt. Kisco's population density in 2000 was 3,189 persons per square mile. Between 2000 and 2008, it is estimated that the total population in the project area grew 5.4 percent, from 79,534 persons to 83,794 persons.

Overview of Target Populations

In the year 2000, there were 167,334 persons 60 years of age and older living in Westchester County, making up 18.1 percent of the County population. Countywide, there were 335 older adults per square mile, while the density of older adults in the project area was 76 per square mile, making up 16.9 percent of the total population in the project area.

The density of persons five years of age and older with a disability in Westchester County was 294 persons per square mile and the percentage of the overall population that had a disability was 15.9 percent. In our project area, less than 12 percent of the total population had a disability and the number of persons with disabilities per square mile was lower than the county level, at 52 persons five years of age and older with a disability, per square mile.

There were over two million households earning less than $25,000 per year in the state of New York in the year 2000. In Westchester County, there were 66,664 low income households, making up close to 20 percent of total households, and 133 per square mile. In contrast, low income households make up both a smaller share, and are less densely settled in our project area, as compared to the County. In the project area, households earning less than $25,000 per year made up less than ten percent of overall households, and there were only 16 per square mile.

Somers is the most populous town in the project area, with close to 20,000 residents in the year 2008. Bedford, with 18,585 persons, is the second most populous, followed by Lewisboro, North Castle, and Mount Kisco, each with more than 10,000 residents, and then North Salem and Pound Ridge, with around 5,000 residents each. Because of its very small area and relatively large population, Mount Kisco is, by far, the most dense community within the project area, with more than 3,000 persons per square mile; Somers is the next densest, with 569 persons per square mile. There were fewer than 500 persons per square mile in each of the other towns within the project area.

Within the project area, older adults made up the largest share of the population in Somers, 24.3 percent, or 4,452 total persons. In all other towns (or village) in the project area, adults 60 years of age and older made up between ten and 19 percent of the total population. Like overall population density, density of older adults was highest in Mount Kisco, at 483 older adults per square mile. Once again, Somers was closest to Mount Kisco, with 138 older adults per square mile. Other areas had fewer than 75 older adults per square mile; the lowest was Pound Ridge, with 36 older adults per square mile.

There were fewer than 2,500 persons with disabilities in each town or village within the study area in the year 2000. Population share of persons with disabilities was between 7.6 percent in Lewisboro and 17.5 percent in Mount Kisco. There were 558 persons with disabilities per square mile in Mount Kisco, 64 per square mile in Somers, 61 in Bedford, and less than 40 in the other towns.

Mount Kisco was also the only village in the project area where households earning less than $25,000 made up more than 20 percent of total households. In Bedford and Somers, low-income households made up close to ten percent of all households, 6.9 percent in North Salem, and less than five percent of households in other areas were low income. Mount Kisco was the densest with low-income households, with 263 per square mile.

Data from the 2000 Census was obtained to create the series of demographic maps described below. Age data was available from Summary File 1 at the census block level, while disability and household income data was available from Summary File 3, at the census block group level. Block groups are generally larger geographic areas than census blocks.

Older Adults

Figure 1 shows the percentage of the total population that was 60 years of age or older by census block in the year 2000. Nearly all census blocks in Pound Ridge and the southeastern corner of Bedford were made up of 10 percent or more older adults. Areas in Bedford, Somers, and North Castle include census blocks in which 50 percent or more of the residents within each census block were older. Of note, the area in Somers just north of Somers Road where there is a high percentage of older adults encompasses the planned community of Heritage Hills. When first developed, Heritage Hills was designed as an age-restricted community, allowing only those over a certain age to purchase homes there. While the minimum age requirement has since been removed, a large number of older adults still reside within the Heritage Hills development.

As illustrated by the map, percentage share can vary from census block to census block. Large sections of Pound Ridge and Salem are made up of between 25 and 50 percent older adults, while the older population of most census blocks in Lewisboro, North Castle, and Mount Kisco is 25 percent or less. Other than the areas of Somers surrounding Heritage Hills and central Somers, there were no significant concentrations with either very high or very low percentages of older adults.

Figure 2 shows the number of adults 60 years of age and older per square mile by census block, for the year 2000. As shown, areas in north Somers, central Somers, north Bedford, and Mount Kisco had more than 250 older adults per square mile, and, with the exception of North Castle where large areas contain between 100 and 250 older adults per square mile, each town or village had smaller pockets of areas where there are more than 100 older adults per square mile. In general, the areas with the most older adults per square mile were in Somers, between the Croton River and Lovell Street and along the Saw Mill River Parkway, from Mount Kisco into Bedford. North Castle, southern Bedford, southern Pound Ridge, and southern Salem all had clusters of census blocks that are moderately dense with older adults.

Figure 3 shows the density of older adults in the study area, along with key destinations of the target populations. Destinations included on this map were identified through Westchester County's GIS website, internet research, a survey conducted by Active Living Over Fifty (ALOFT), the Westchester County Databook 2008, and the Coordinated Public Transit-Human Services Transportation Plan for the NYMTC Area. Destinations include grocery stores, pharmacies, retail locations, major employers, big box retail stores, community centers, assisted living/ adult homes, social service or government offices, shelters/ food pantries, hospitals, post offices, libraries, and universities. It is important to note that in many cases, destinations serve dual purposes. For example, many hospitals or big box retailers are also major employers. In instances where this was the case, the destination's primary purpose, such as "hospital" was symbolized. For analytical purposes, locations outside of the study area, but within reasonable travel distance, such as White Plains and Harrison, were included. A complete list of the destinations shown in Figure 3 is provided in Appendix A.

Large concentrations of key destinations can be found in Mount Kisco, near a high concentration of older adults, and in White Plains. Outside of Mount Kisco, northern Bedford along the Saw Mill River Parkway, also an area with a high density of older adults, and Somers seem to hold the most destinations, with a mix of grocery stores, pharmacies, and government offices. Post offices, libraries, and community centers or adult homes can be found in most other towns within the project area.

Persons with Disabilities

As illustrated by Figure 4, each town or village in the study area, except Lewisboro, contained at least one census block group where at least 15 percent of the population had a disability. In Bedford and Pound Ridge, census block groups where 15 percent or more of the population had a disability made up half nearly half of the town area. Outside of Bedford and Pound Ridge, most of the project area is made of census block groups where between five and 15 percent of the population had a disability.

Figure 5 shows the density of persons five years of age and older that have a disability at the census block group level, for the year 2000. There are far fewer census block groups in the study area, 83, than there are census blocks, so areas containing persons with disabilities appear in wider swaths than do areas of older adults. The highest concentrations of persons with disabilities are found in the most southern end of North Castle, near White Plains, and in the middle of that town; Mount Kisco; Bedford, along the Saw Mill River Parkway; and in Northern Somers. Areas of lesser concentrations of this population group are generally found throughout the center of the County, north to south.

Table 1: Project Area Demographics by Municipality

Town/ Village	Bedford	Lewisboro	Mount Kisco	North Castle	North Salem	Pound Ridge	Somers	Project Area	Westchester County	New York
Population 2000	18,133	12,324	9,983	10,849	5,173	4,726	18,346	79,534	923,459	18,976,457
Population Density 2000 (persons per square mile)	461	423	3,189	410	226	201	569	450	1,847	348
Adults 60 and Over 2000	2,605	1,353	1,511	1,672	976	844	4,452	13,413	167,334	3,529,781
Adults 60 and Over per Square Mile 2000	66	46	483	63	43	36	138	76	335	65
% of Adults 60 and Over 2000	14.37%	10.98%	15.14%	15.41%	18.87%	17.86%	24.27%	16.86%	18.12%	18.60%
Persons 5 and Over w/ a Disability 2000	2,407	936	1,745	1,003	557	514	2,071	9,233	147,066	3,606,147
Persons 5 and Over w/ a Disability per Square Mile 2000	61	32	558	38	24	22	64	52	294	66
% of Pop. 5 and Over w/ a Disability 2000	13.27%	7.59%	17.48%	9.25%	10.77%	10.88%	11.29%	11.61%	15.93%	19.00%
Total Households 2000	5,763	4,224	3,995	3,588	1,780	1,703	6,808	27,861	337,142	7,060,595
Low Income Households (< $25,000) 2000	607	205	822	275	123	76	652	2,760	66,664	2,085,438
Low Income Households per Square Mile 2000	15	7	263	10	5	3	20	16	133	38
% Households that are Low Income 2000	10.53%	4.85%	20.58%	7.66%	6.91%	4.46%	9.58%	9.91%	19.77%	29.54%
2008 Estimated Population	18,585	12,513	10,396	12,148	5,219	4,939	19,994	83,794	953,943	19,490,297

Figure 1: Percentage of the Population 60 Years of Age and Older

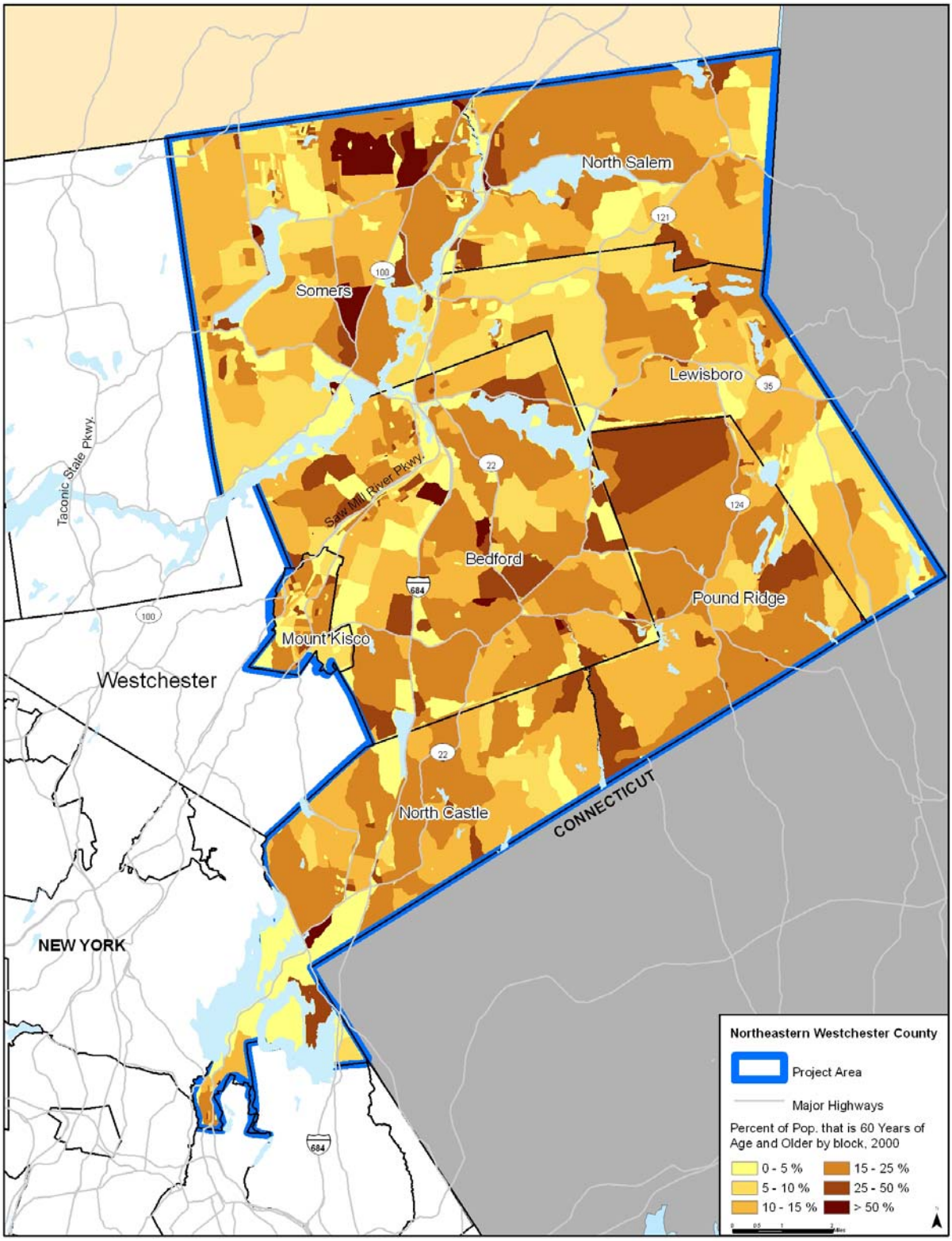


Figure 2: Density of Adults 60 Years of Age and Older

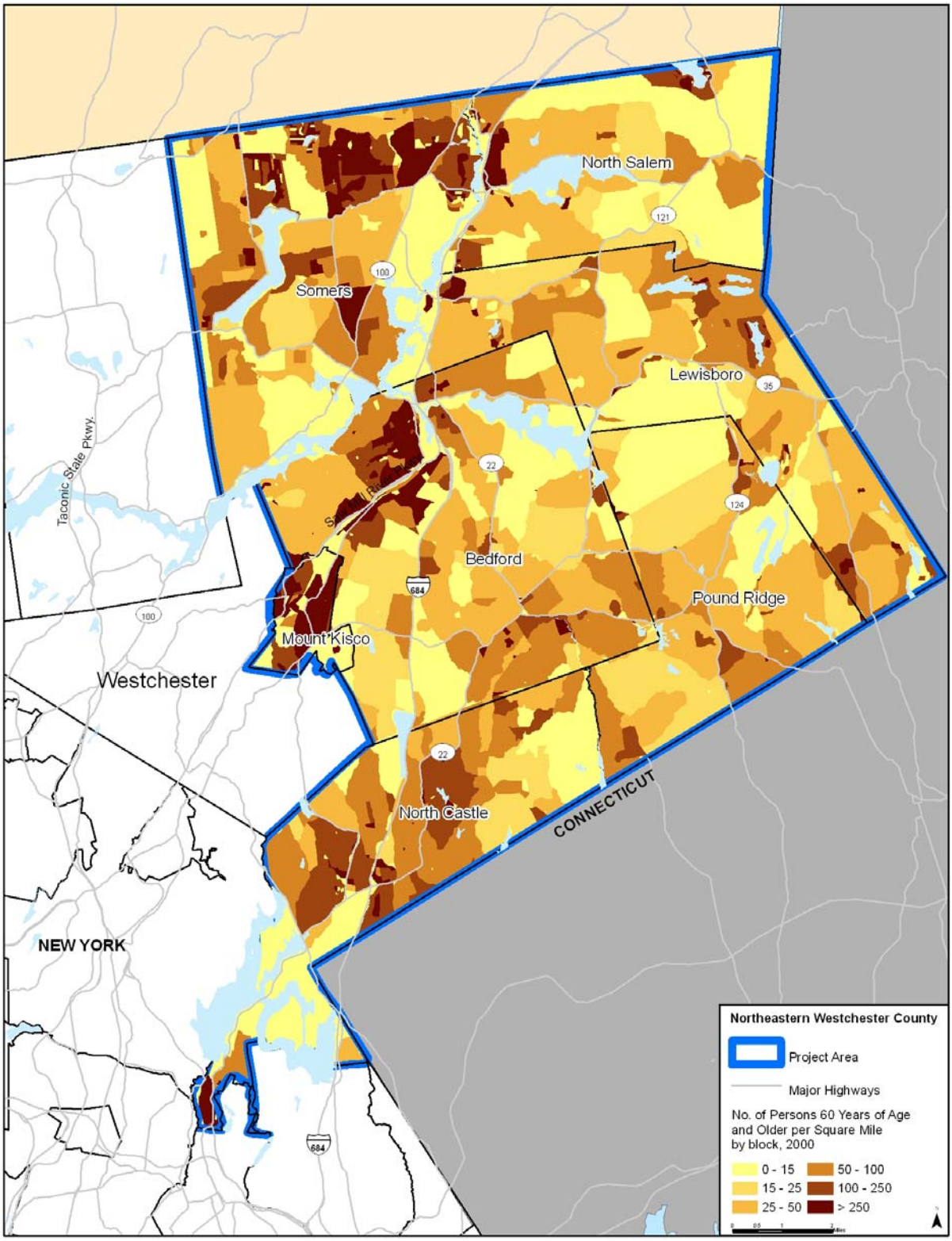


Figure 3: Density of Adults 60 Years of Age and Older and Key Destinations

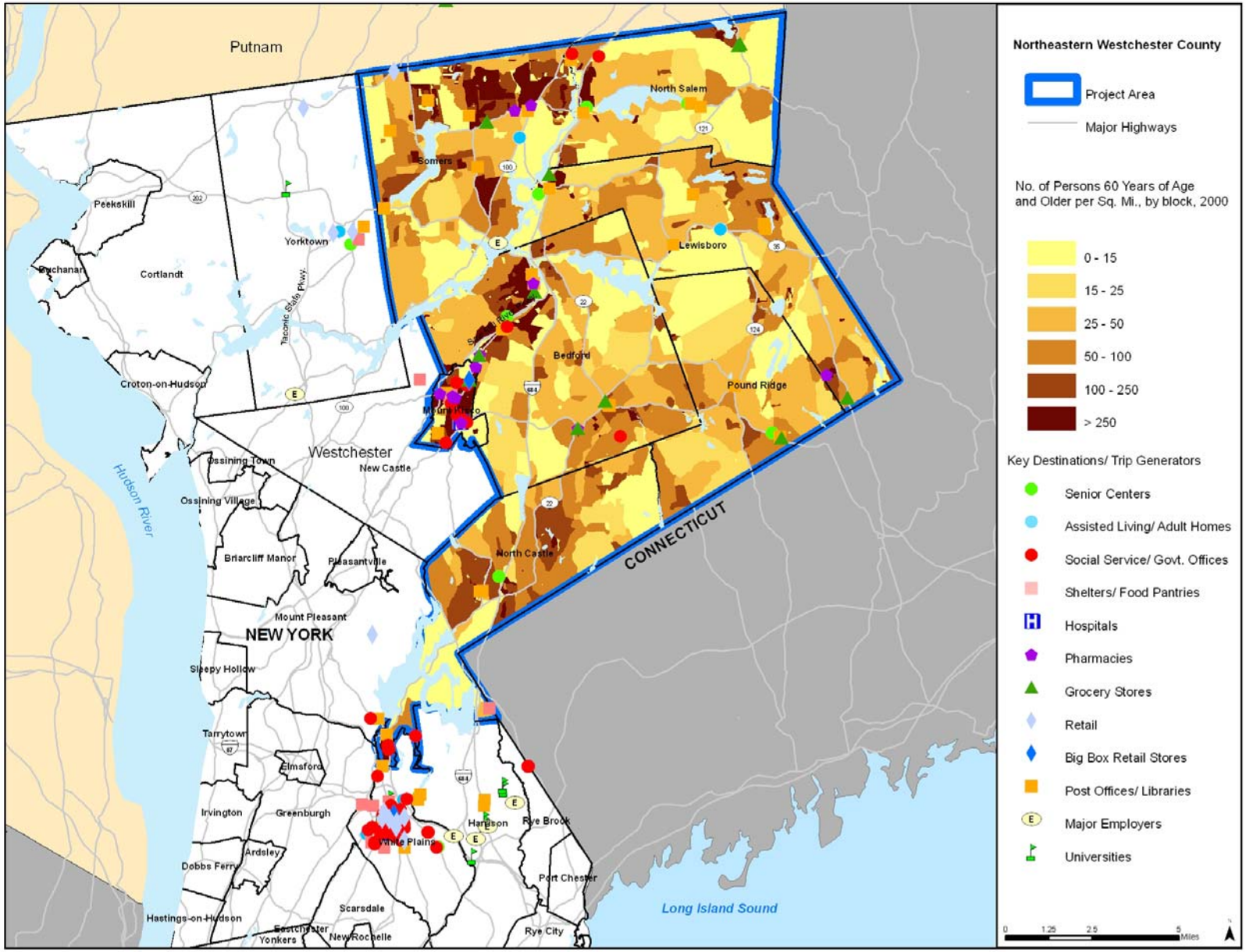


Figure 4: Percentage of the Population that is Five Years of Age and Older with a Disability

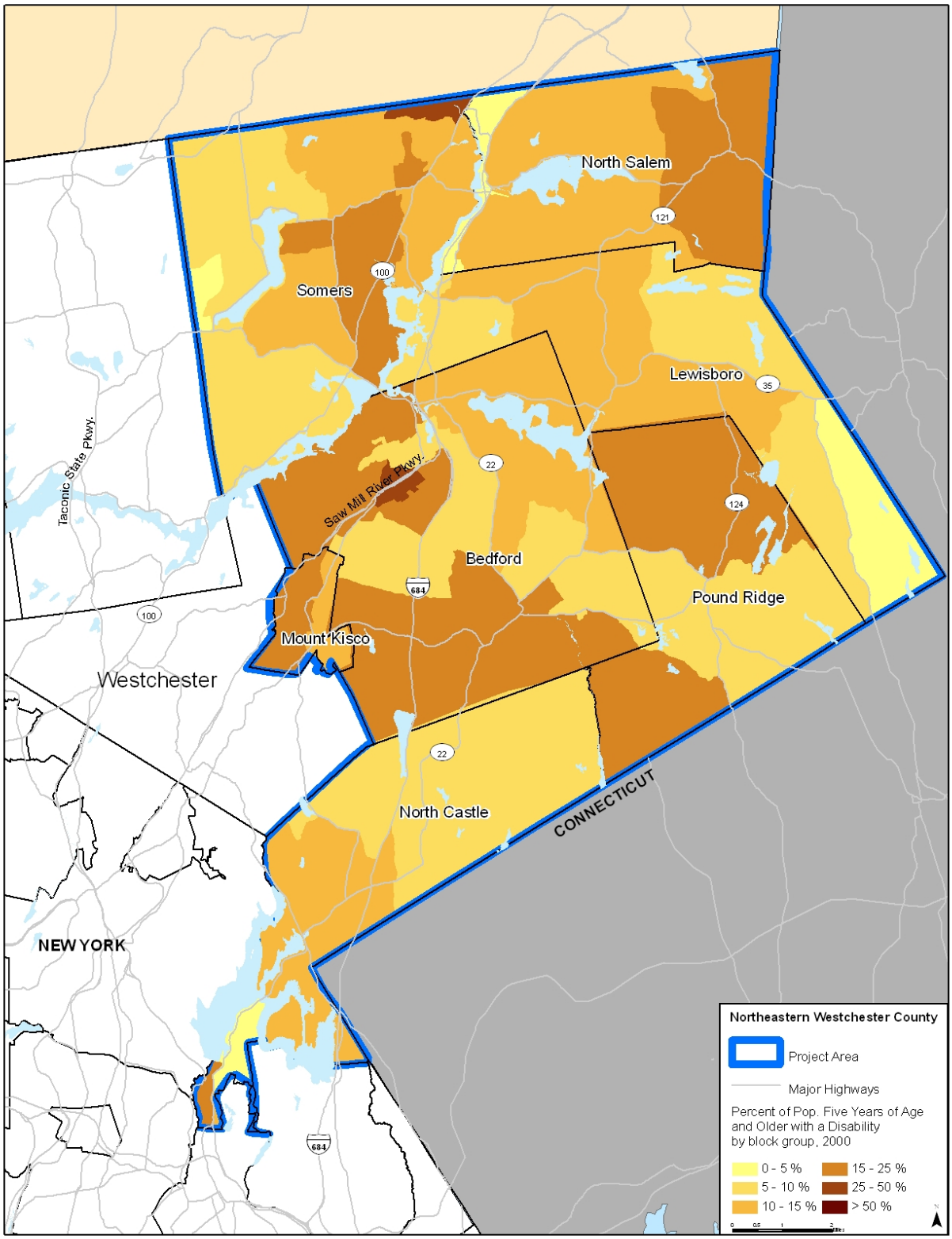
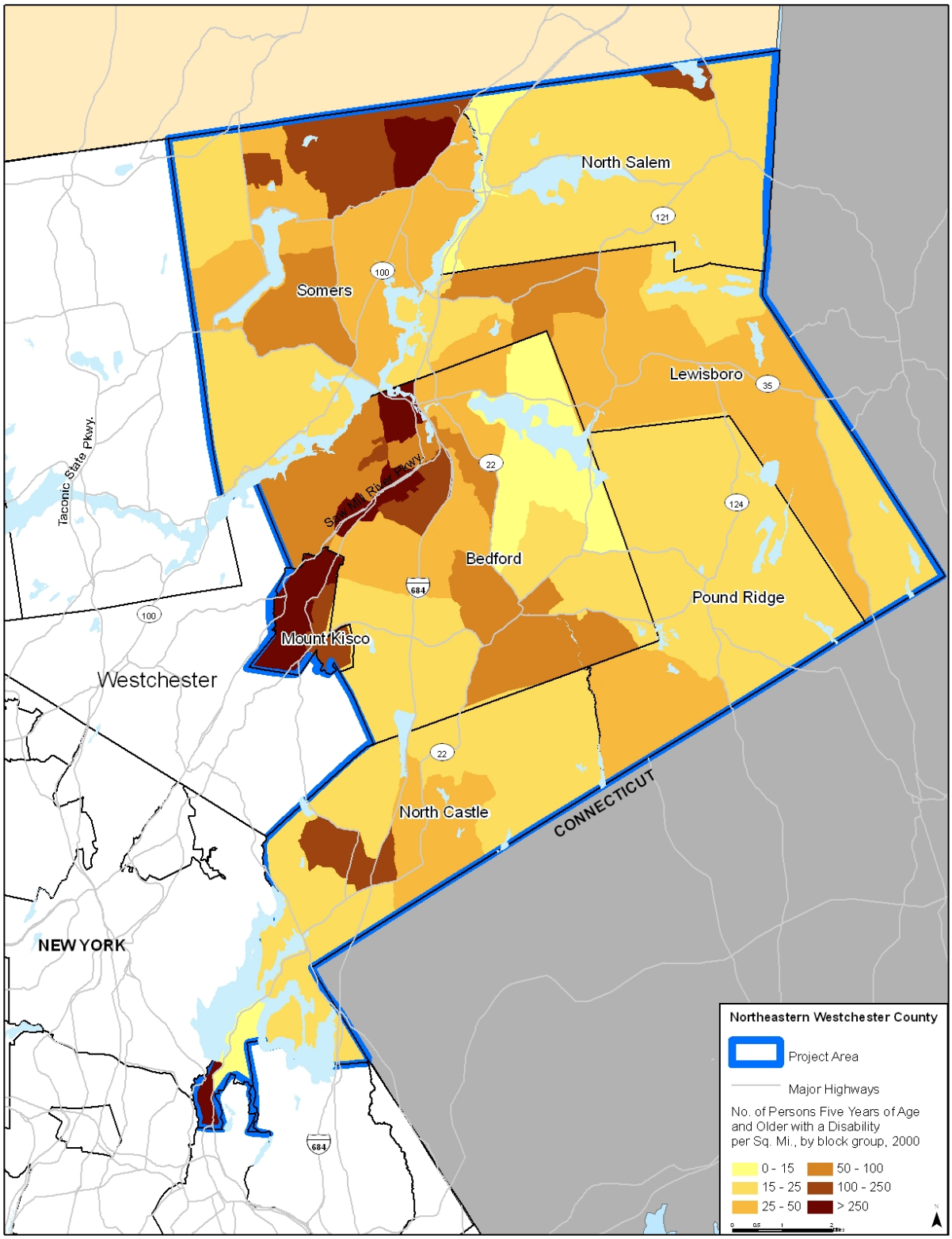


Figure 5: Density of Persons Five Years of Age and Older with a Disability



Key destinations and the density of persons five years of age and older with a disability are presented in Figure 6. This map shows that the highest concentrations of persons with disabilities in the study area were located near areas where many and various services are available.

Households with Low Annual Incomes

As shown in Figure 7, the percentage of total households with low incomes is somewhat more variable than the density. About 40 percent of the project area was made up of census block groups where five percent or less of households had low incomes and another 40 percent was made up of areas where 15 percent or less of households fell into that category. Only in Mount Kisco was there a small concentration of census block groups where a higher percentage of the total households were considered low-income.

Density of households earning less than $25,000 per year at the census block group level, as of the year 2000, are shown in Figure 8. As demonstrated by the map, except for Mount Kisco, the majority of the study area is made up of census block groups where there were less than ten low-income households per square mile. In Mount Kisco, there were no fewer than 25 low-income households per square mile in any census block group, and there was one census block group with more than 250 low-income households per square mile. Somers, in the area adjacent to Putnam County, and Bedford along the Saw Mill River Parkway also contained concentrations of census block groups moderately dense with low-income households.

It's important to note that low-income households are concentrated (though in smaller clusters) in many of the same areas as older adults and persons with disabilities: southern North Castle, Mount Kisco, Bedford along the Saw Mill River Parkway, and in northern Somers.

Figure 9 highlights the density of low -income households with relation to key destinations in and around the project area. This map shows that the great majority of key destinations are located within the few areas of the County where there are 50 or more low income households per square mile. This is especially evident within Mount Kisco, and in Bedford, along the Saw Mill River Parkway, where at least 15 key destinations are located.

Figure 6: Density of Persons with Disabilities and Key Destinations

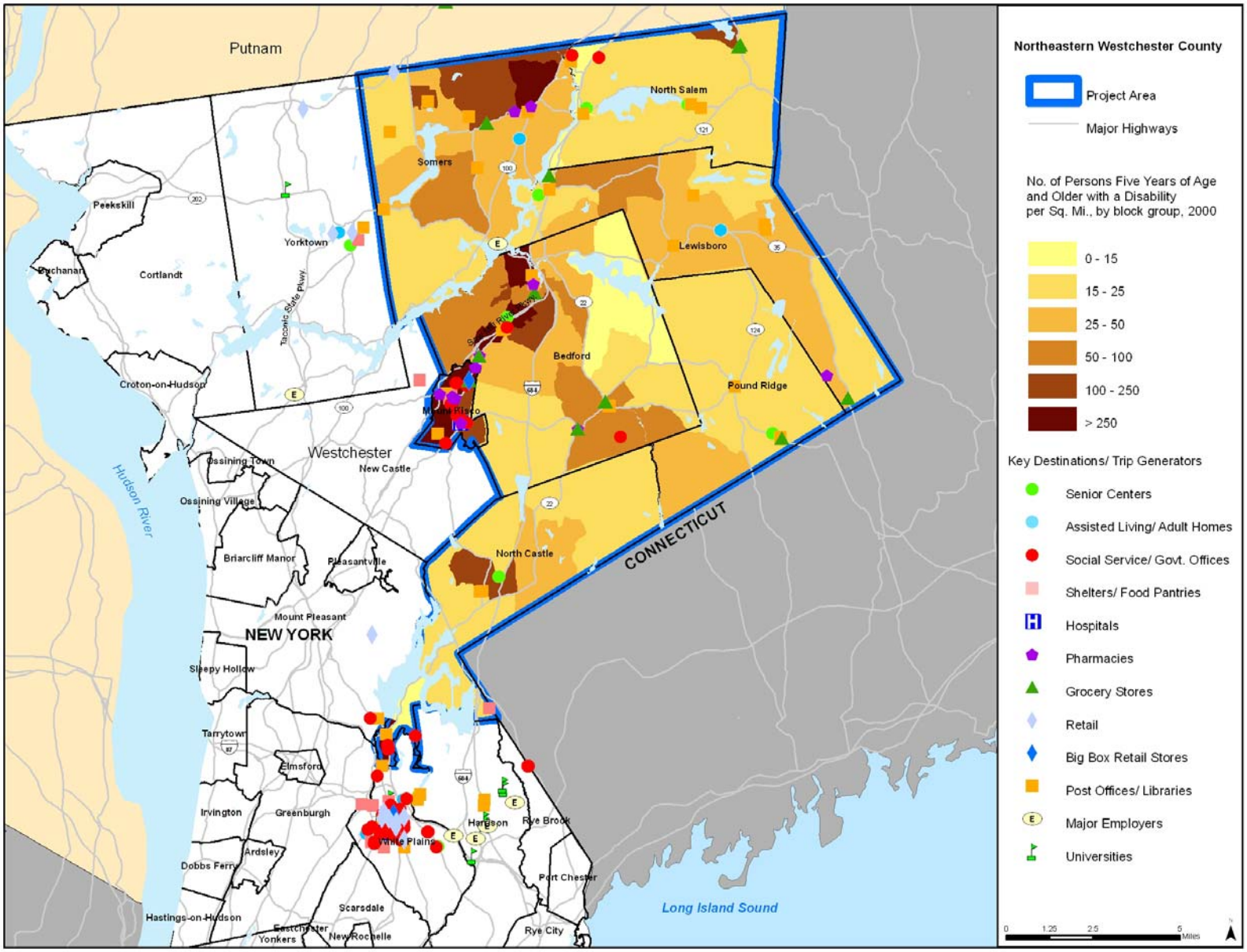


Figure 7: Percentage of Low-Income Households

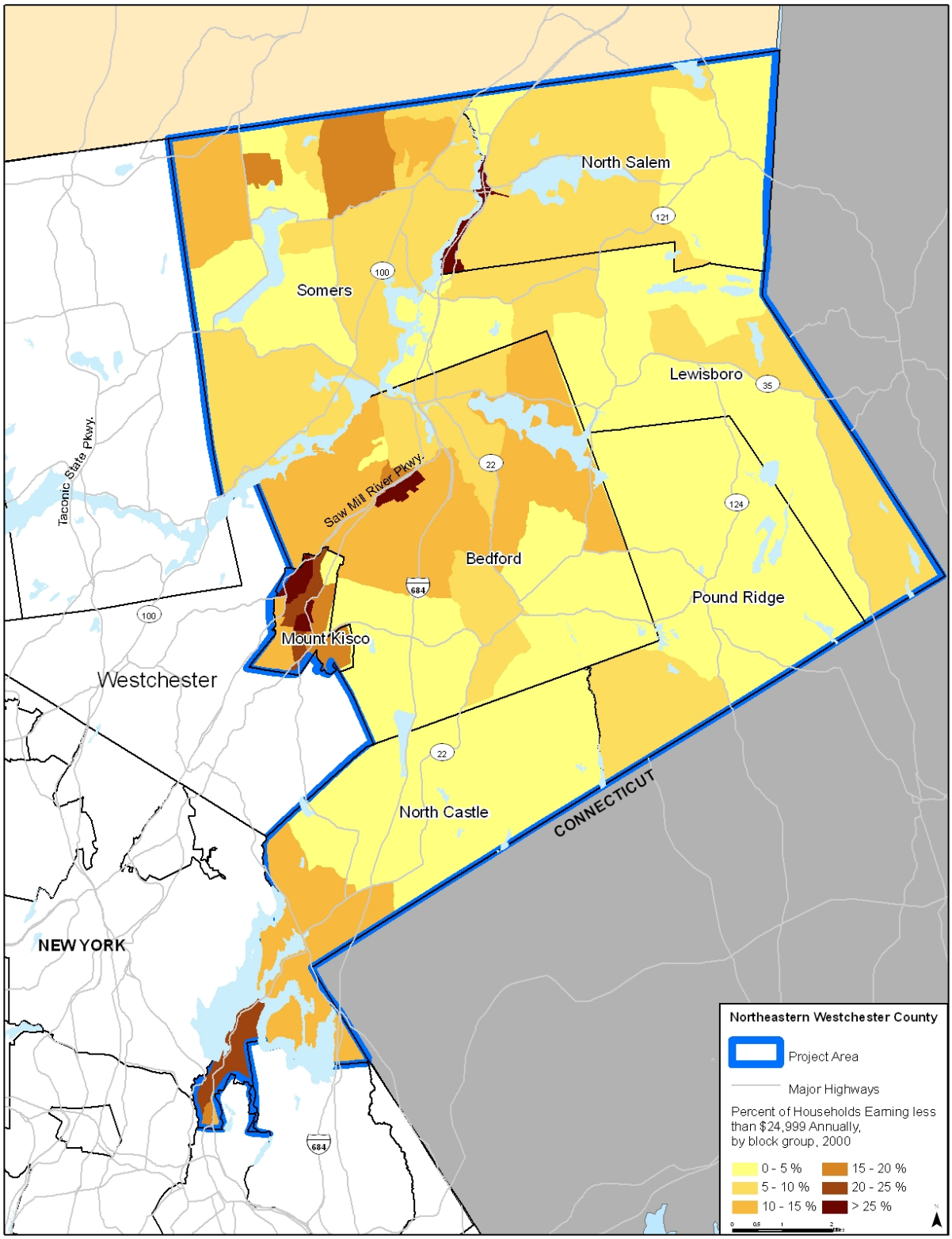


Figure 8: Density of Low-Income Households

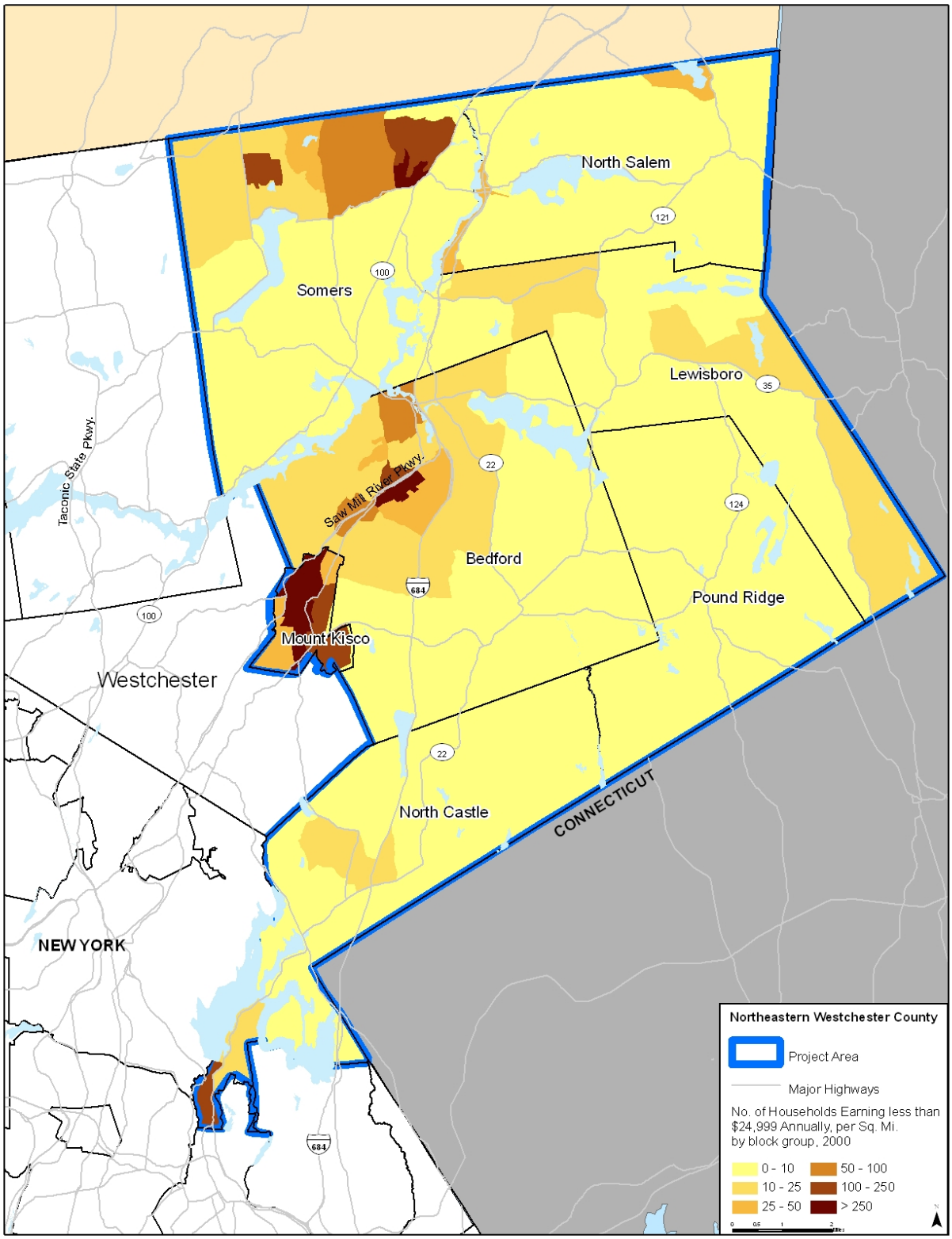
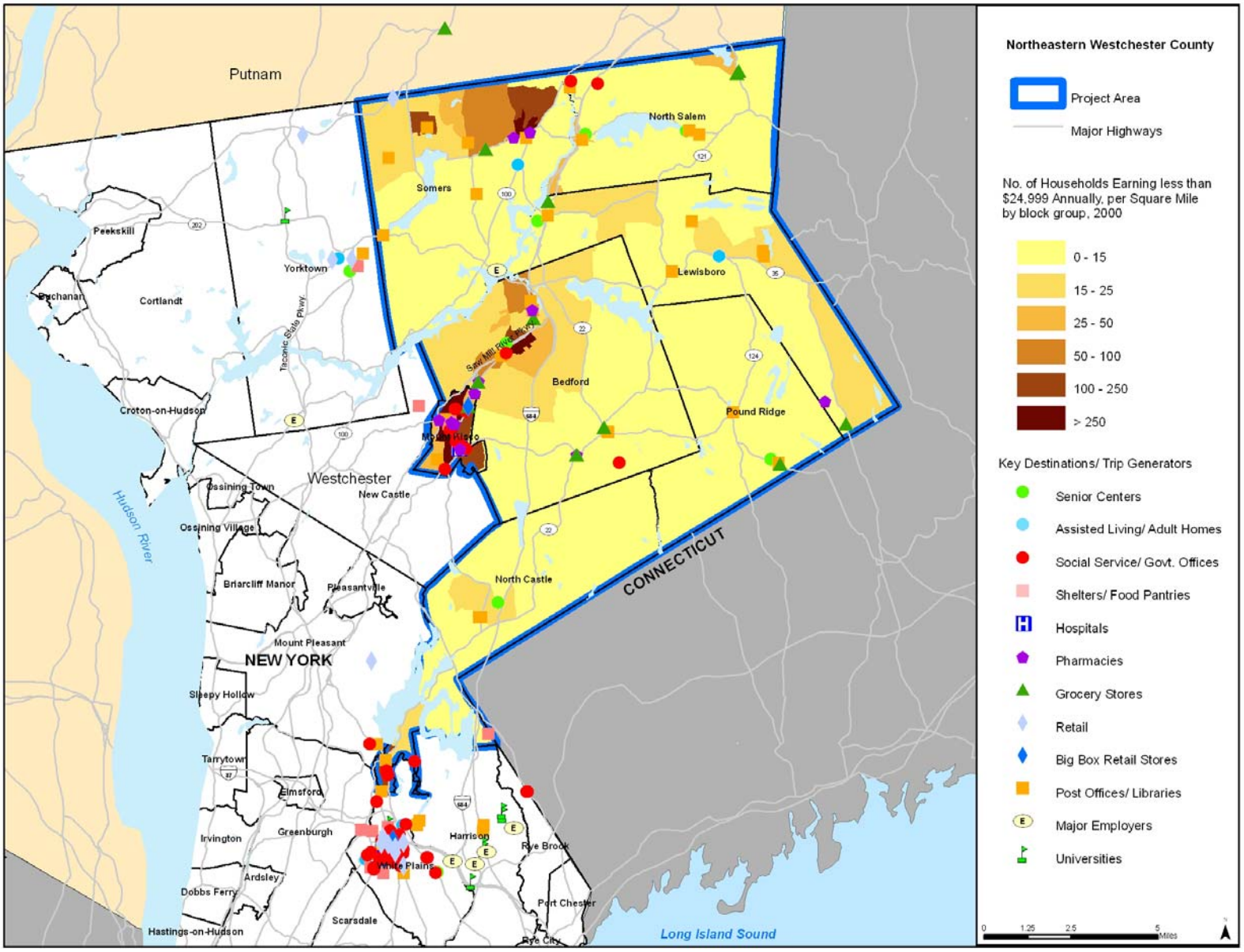


Figure 9: Density of Low-Income Households and Key Destinations



Provider Inventory

This section outlines public and private transportation service currently available in northeastern Westchester County, based on input from the Advisory Council, Steering Committee, a provider survey conducted by ALOFT, the National Transit Database, the Coordinated Public Transit-Human Services Transportation Plan for the NYMTC Area, town web sites, and online research. Where available, the inventory includes information on provider type, type of service, level of service, service area, days and house of service, eligibility, trip purpose or restrictions, and fares.

Table 2 outlines the information discussed below.

Provider Type

Westchester County Office for the Disabled is the single provider of complementary paratransit service provided in the County to meet the requirements of the Americans with Disabilities Act (ADA). The service is known as Bee-Line ParaTransit. There are three fixed route providers serving the project area: MTA Metro-North Railroad (Harlem Line), a passenger railroad service; Bee-Line fixed route bus service operated by the Westchester County Department of Transportation, and a fixed route shuttle operated by Housatonic Area Regional Transit (HART), one of Connecticut's public transit providers. The seven municipalities in the project area operate transportation programs, the majority of which are available to older adults for specific trip purposes. Private providers, whether non-profit or for-profit, generally provide transportation for a specific purpose; there were twelve such services indentified in the project area. Ten volunteer ride programs are in service within some part of the project area.

A number of taxi or livery services were also identified. Those services are included as part of the Table 2 at the end of this section, although they are not discussed in the sub-sections that follow. Taxi and livery services are generally provided during extended business hours, some 24 hours per day, in sedans, which are not lift-equipped. The taxi and livery services found in Table 2 were identified through a variety of sources, including stakeholder input and internet research, and may or may not currently be providing service within the project area. Companies that are known to be operating in northeastern Westchester and that have responded to surveys and/or participated in project meetings are noted by an asterisk.

Type of Service

Most of the private non-profit transportation providers identified provide demand response-type service of some kind, as do the volunteer programs. This was also the case for those municipal transportation providers where type of service could be determined, although Somers Adult Transportation provides both fixed route and door-to-door service. In general, service is provided on a door-to-door basis, although North Castle Seniors service is door-through-door. With the exception of a school transportation provider, all of the private providers identified operate either fixed route commuter service or van service of some kind. In addition to fixed route service, CLC provides demand response service for some trips.

Service Area

Countywide ADA ParaTransit service is provided by the Westchester County Office for the Disabled during "core" service hours, Monday through Friday, 6 AM until 7 PM and Saturday, 8 AM until 7 PM. During other times, service is provided only within ¾ mile of fixed bus routes when they are in service. Family Services of Westchester and Renaissance Community Services also provide service throughout the county. MTA's Metro-North Railroad Harlem Line runs from New York City into Putnam County, and has stops within the

service area in Mount Kisco, Bedford Hills, Katonah, Goldens Bridge, Purdy's in North Salem, and Croton Falls, and HART has two stops within the project area, at Katonah and Lewisboro.

There are two Bee-Line routes that run within the project area. Routes 12 and 19 serve parts of Mount Kisco, Bedford, and North Castle.

Each of the seven towns within the project area is served by a municipal transportation program. The Bedford, North Salem, Mt. Kisco and North Castle programs operate only within respective town limits. Somers Adult Transportation and the Lewisboro Service Outreach program make trips within town and to specific out-of-town locations, such as Mount Kisco and Putnam County Hospital, and Connecticut. Service provided by Pound Ridge operates in the local area and beyond. Most of the local volunteer services provide local rides only, although at least one service will travel farther for medical appointments.

Because many of the private providers identified operate medical or employment-related service, the majority of service is available only to and from specific destinations. For example, Northern Westchester Hospital will pick up employees from certain remote parking areas and transport them to work at the hospital.

Days and Hours of Service

Days and hours of service vary greatly depending on the type of service. The Westchester County Office for the Disabled provides countywide ADA paratransit service during "core" service hours; additional service is provided in the project area as noted in Table 2. Both the Metro-North Railroad and Bee-Line Bus operate seven days a week, from early morning until late evening. Because HART's shuttle is a commuter service, trips are only provided on weekdays, during peak hours.

Of the seven municipal services identified, four operate one to three days per week, and the remaining three provide service Monday through Friday. Service hours are generally from 9 AM or 10 AM until 3 PM.

Service times for both private providers and volunteer services range from one day a month to seven days per week.

Eligibility

Fixed route transit services such as the Harlem Line, Bee-Line Bus, and HART are available to the general public and have no eligibility restrictions. Riders on the Bee-Line ParaTransit service operated by the Westchester County Office for the Disabled must be ADA certified. Six of the seven municipal programs restrict service to older adults, though the specific age limit can vary. North Castle provides service to older adult residents.

Agency transportation is limited to participants in agency programs. Likewise, a number of the private transportation services restrict ridership to employees or patrons of the sponsoring agency.

Four out of ten volunteer programs will provide rides to "anyone in need" in their area.

Trip Purpose

There are no restrictions for trip purpose on general public fixed route services such as the Bee-Line Bus or for Bee-Line ParaTransit. Each of the seven municipal programs provides trips for specific purposes such as to and from nutrition centers, medical or shopping trips, or recreation. The same is true for most of the volunteer programs, although Fishes and Loaves and St. Patrick's Senior Neighbors Program in Bedford Village will provide trips for any reason.

Because most of the private providers identified are medical or employment-related organizations, transportation is provided for that reason: to and from medical appointments or employment sites. The exception is the Heritage Hills Bus Service, which provides service to residents for medical, shopping, or commuting purposes.

The one-way fare for service varies from a $1 suggested donation on the Mount Kisco Senior Nutrition Program, to $5 on Somers Adult Transportation (medical trips only) and North Castle Seniors. Fares on the Metro-North Railroad may be more, depending on origin and destination.

Unmet Needs and Gaps in Service

As indicated by the demographic and destination maps previously presented, key destinations are concentrated in certain areas within the project area, primarily Mount Kisco and northern Somers, and in and around Harrison and White Plains. While there are high concentrations of the target populations in Mount Kisco, residents of other towns may need to travel outside of their municipal boundaries in order to access services, such as medical care, retail centers, and employment opportunities. Lewisboro, Pound Ridge, and North Castle, in particular, seem to have few local destination options other than community centers and post offices.

Similarly, most of the municipal transportation options available limit residents to traveling within town boundaries, have some kind of age-related restriction attached, and operate during limited hours only. Though fixed route service is available during expanded hours and to anyone, coverage within the project area is extremely limited, making it difficult for many to use service to meet their needs effectively.

With the assistance of ALOFT, the Project Steering Committee, and the Project Advisory Council additional, and sometimes very similar, gaps in service were identified and are briefly discussed below.

Consumers face a general lack of transportation availability, with limited public transportation options restricting mobility for some residents. MTA Metro North Railroad's Harlem Line runs north-south with numerous stops within the project area, though there is no complementary bus service to meet the train, outside of Mount Kisco or Bedford. Fixed route bus service is available only in that same area, with north-south routes in Mount Kisco, Bedford, and North Castle, and even those areas receive limited days and hours of service, making early or late employment trips difficult. While the County does provide countywide paratransit service, individuals must be ADA-certified to utilize the service. Similarly, east -west trips or trips outside of one's immediate municipal area, such as medical trips to larger hospitals, can be challenging.

Many consumers are also unaware of the services that are available to them, such as shopper shuttles or volunteer services for trips to medical appointments. There is no central database of all of the available transportation resources to better coordinate meeting the community's needs.

Providers also face challenges in providing transportation services to the consumer. Coordination among different agencies is complicated by differing driver requirements, and sprawling development patterns within the project area have made it difficult and expensive to provide efficient service. Agencies with limited budgets are facing growing expenses, especially with relation to vehicle purchase and maintenance.

Likewise, there is no financial incentive for volunteers to provide rides to consumers, and the lack of appropriate insurance may leave them vulnerable to being sued. Taxi and Limousine Commission regulations also pose a challenge to transporting people in passenger vehicles. Finally, there are not enough willing volunteer drivers.

Table 2: Transportation Service Information

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
ADA Paratransit Service							
Westchester County Office for the Disabled	Curb-to-curb paratransit	Exceeds mandated requirements by providing service countywide during "core" service hours For fixed route bus service in operation outside of core hours, service is provided within 3/4 of a mile of route	Core service hours (countywide service): Mon - Fri, 6a - 7p, Sat, 8a - 7p Additional service in northeast Westchester County: Route 12, evening, Mon - Fri	ADA Certified	All	$4	60
Fixed Route Transit Service							
MTA Metro-North Railroad (Harlem Line)	Passenger railroad	Fixed route railroad with stops at Mt. Kisco, Bedford Hills, Katonah, Golden's Bridge, Purdys, and Croton Falls	Mon - Sun, 12a - 11p	N/A	N/A	Dependent on origin and destination	
Bee-Line	Fixed-route bus	Mt. Kisco, Bedford, and North Castle	Route 12: Mon - 6a - 7:30p; Sat, 8:30 a-6p; Sun, 8:30a - 6:30p Route 19: Mon - Fri, 6a - 7:30p, Sat 7a - 6:30p	N/A	N/A	$2.25 general public; $1.10 senior/ disabled Unlimited ride passses available	4- 40' articulated buses serve Routes 12 and 19

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
HART	Fixed-route shuttle	Katonah to Ridgefield, CT with a stop in Lewisboro (South Salem)	Mon - Fri, 5:45a - 8:30a, 5p - 9p	N/A	Limited stop bus service	$1.25 general public; $0.60 senior/ disabled	
Municipal Transportation Programs							
Town of Bedford	Town program for seniors	Within town limits to Bedford Hills Community House; shopping trips departing from Community Center	Mon, Wed, Fri, 10a - 3p	Adults 50+	Senior programs, shopping		1 vehicle
Town of North Salem		Within the Town and to senior nutrition program in Somers	Twice a week	Older adults			1 vehicle
Town of Pound Ridge		Local area and beyond	Wed 10a - 3p	Pound Ridge residents age 65+	Recreation, Shopping		1 vehicle
Mt. Kisco Senior Nutrition Program	Door-to-door	Mt. Kisco	Mon - Fri, 9a - 3p	Mt. Kisco residents 60+	To and from Fox Senior Nutrition Center, shopping	$1 suggested donation per round trip	1 vehicle
Somers Adult Transportation	Fixed-route and door-to-door (medical appointments and meals)	Hamlets of Lincolndale, Granite Springs, Shenorock, Somers, Amawalk, Purdys, and Baldwin Place; as far south as Mt. Kisco and as far north as Putnam County Hospital	Mon - Fri, 8a - 3p Shopping trips twice a week	Older adults	Medical appointments, meals (DR); shopping, library, senior meeting, recreational, social	$5 requested per medical trip; $1 for other types of trips	4 vehicles

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
Town of Lewisboro-Senior Outreach Program	Door-to-door paratransit	Shopping trips to Yorktown, CT, and other locations	Mon - Fri, 9a - 4:30p	Older adults who are residents of Lewisboro	Doctor or other medical appointments		1 sedan 1 van
North Castle Seniors	Door-through-door	North Castle	Wed, 11a - 3p	North Castle older adults	To Town Recreation Center	None	1 vehicle
Private (non-profit or for profit) Providers							
Family Services of Westchester		Westchester County	Mon - Fri, 7:30a - 5:30p (7 days/ week for home health aides)	Program participants	Agency transportation to over 50 programs, including van service between Mt. Vernon and Yorktown for home health aides		16 vehicles
My Second Home (FSW)		Westchester I-287 and north	Service to attend program 8:30 a-5p Potential vehicle/driver availability due to midday downtime	Frail elderly (trips provided to about 50 people/day)	Transportation to Social Adult Daycare Program	None	7 vehicles 8 part-time drivers
Renaissance Community Services	Demand response	Westchester, Putnam, and Rockland counties	24 hours/ 7 days	Program participants (alcohol and substance abuse)	Agency transportation		5 vehicles

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
Richmond Community Services	Demand response	Portions of Westchester and Putnam counties, including Mt. Kisco	Mon - Fri, 7a - 6p, Sat - Sun, 10am - 8p	Program participants (developmentally disabled and traumatic brain injury)	Agency transportation		10 vehicles
Heritage Hills Bus Service (private bus for residents)	Fixed route	Town of Somers, Golden's Bridge train station, A&P	Mon - Fri, 5:30a - 4:40p	Older adults that are residents of Heritage Hills	Medical, shopping, commute	None	
VNA Hudson Valley	Contract van service	Pick-up at Fordham (the Bronx) train station for transport to Heritage Hills, South Salem, Pound Ridge, and Shrub Oak		Home health aides employed by VNA Hudson Valley	Employment		2
Elder Care Connections (Home Care Agency)	Matches independent drivers with patients who pay fee to drivers	Westchester and Putnam counties	Flexible	Patients of Elder Care Connection	All types	$20	NA
People Care (Home Care Agency)	Van service	From Ossining to Peekskill and Mahopac; limited service to Mt. Kisco	5 days/ week	Home health aides employed by People Care	Employment		
Northern Westchester Hospital	Contract van service	From remote parking areas at Reader's Digest in Chappaqua and the Unitarian Church in Mt. Kisco to hospital		Employees	Employment		

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
Somers Manor Nursing Home	Van service				Employment		
Neighbors Home Care Service of Grace Church Community Center	Van service	From White Plains train station to areas in Bedford or Somers			Employment		
CLC Transportation	Fixed routes for Medicaid service; demand response for other trips	Westchester and Putnam counties	Mon - Fri, 7a - 4:30 p	Medicaid recipients Persons with disabilities	Medical Employment Shopping (as authorized by Medicaid)		14 vehicles
Chappaqua Transportation	Contracted service	Westchester County	Flexible	No requirements	All types		
Volunteer Ride Programs							
North Salem FISH		North Salem	Limited, as needed service for medical appointments	Any resident in need	Medical appointments	None	Volunteer drivers with own cars
"Neighbor to Neighbor", Town of Pound Ridge	Door-through-door volunteer driver service	Town of Pound Ridge and neighboring communities including CT	Wed before noon to shopping at Scott's Corner; as needed, medical appointments; limited service for recreation	Resident of Pound Ridge with a disability or 65+	Shopping, medical, recreation	None	Van Volunteer drivers' vehicles

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
Mt. Kisco and Bedford FISH	Door-to-door volunteer driver service	Mt. Kisco, Bedford	Mon - Fri, 9a-7p	Residents in need	Medical	None	Volunteer drivers' vehicles
FISH (Heritage Hills)	Door-to-door volunteer driver service	As needed within reason	7 days/ week	Older adults that are residents of Heritage Hills	Medical appointments	None	Volunteer drivers' vehicles
At Home in Somers Driver Volunteers	Arm-though-arm volunteer driver service	Upper Westchester County	Mon - Fri, 9a - 5p; weekends if urgent	Older Adults that are paid members of At Home in Somers	Medical appointments in Somers, Katonah, Mt. Kisco, Carmel, meal delivery, carpool to AHIS programs, social/ recreational, shopping	None	Volunteer drivers' vehicles
Pound Ridge Community Church	Arm-through-arm volunteer driver service	As needed	As needed	Anyone in need; primarily older adults connected to the Pound Ridge community	Social, recreation	None	Volunteer drivers' vehicles
First Presbyterian Church of Katonah	Arm-through-arm volunteer driver service	As needed	Mon - Fri, 9a - 10p, Sun, 7:30a - 1p	Church members	Doctor and medical, religious events	None	Volunteer drivers' vehicles
Congregation B'nai Yisrael	Door-to-door volunteer driver service	As needed	Mon - Thurs, 10a - 6p; Fri, 10a - 1p	Congregation members	Religious and cultural events at temple	None	Volunteer drivers' vehicles
St. Patrick's Parish, Bedford	Door-to-door, arm-through-arm volunteer driver service	As needed	As needed	No restrictions	No restrictions	None	Volunteer drivers' vehicles
Fishes and Loaves	Arm-through-arm volunteer driver service	Katonah, Mt. Kisco, Somers, and South Salem	Mon - Sun, 9a - 6p; other times when available	Residents in need in Katonah	Any	None	Volunteer drivers' vehicles

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
Taxi and Livery Service							
Aerotaxi Car Service	Livery	Katonah					
Aerotaxi, Inc.	Taxi	Mount Kisco					
Al's Car Service/Taxi	Taxi/ Limo	Croton Falls					
Bedford Car Service	Livery	Bedford Hills					
Bedford Express Car Service Inc.	Limo	Bedford Hills					
Bedford Hills Taxi Car Service	Taxi/ Limo	Bedford Hills					
Carmel Limousine Westchester	Limo	Mount Kisco					
Croton Taxi and Airport Service	Shuttle/ Taxi	Bedford area					
Ernie's Taxi*	Taxi	Mount Kisco					
Everetts Livery Service Pound Ridge	Livery	Pound Ridge					
Frank's Taxi	Taxi	Bedford Hills					
Jose Hidalgo	Taxi	Mt Kisco					
Juan Ayala	Taxi	Brewster					
Katonah Taxi	Taxi	Bedford and Katonah					
Katonah Taxi & Limo*	Taxi/ Limo	Mount Kisco					
Katonah-Bedford Taxi & Limo*	Taxi/ Limo	Mount Kisco					
Kisco Express Service, Inc. aka KES Taxi*	Taxi	Mount Kisco					
KiscoCab	Taxi	Mount Kisco					
Mount Kisco Taxi	Taxi	Mount Kisco and Bedford					

Provider	Type of Service/ Level of Assistance	Service Area	Days/Hours of Service	Eligibility	Trip Purposes	One-Way Fare	Fleet Size
North Salem Limousine	Limo	Brewster					
Sam's Transport & Limousine Service, Inc.	Limo	Bedford Hills					
Yorkie's Taxi and Limo, Inc.*	Limo	Mt. Kisco					

* Responsive to ALOFT provider survey and small group meetings

Sources: Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley, ALOFT survey and research, Westchester County Department of Transportation Annual Report 2009, National Transit Database, town web sites, Yahoo!Local

Appendix A: Key Destinations for Target Populations in Northeast Westchester County

Name	Address	City	State	Zip	Description	Source
(Armonk) North Castle Public Library	19 Whippoorwill Road East	Armonk	NY	10504	Libraries	Westchester County GIS
(Pound Ridge) Hiram Halle Memorial Library	271 Westchester Ave	Pound Ridge	NY	10576	Libraries	Westchester County GIS
A & P Food Market	100 Route 22	Goldens Bridge	NY	10526	grocery	web
A & P Food Market	195 N Bedford Rd	Mount Kisco	NY	10549	grocery	ALOFT survey
A & P Food Market	132 Bedford Rd	Katonah	NY	10536	grocery	web
A & P Food Market	422 Old Post Rd	Bedford	NY	10506	grocery	web
Ability Beyond Disability	120 Kisco Avenue	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Allen AME. Church	65 Fisher Avenue	White Plains	NY	10606	Food Pantries	Westchester County GIS
Amawalk P.O.	1 Mahopac Avenue	Amawalk	NY	10501	Post Offices	Westchester County GIS
Andrus Childrens Center	19 Greenridge Avenue	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Armonk P.O.	407 Main Street	Armonk	NY	10504	Post Offices	Westchester County GIS
Bedford Free Library	32 Village Green	Bedford	NY	10506	Libraries	Westchester County GIS
Bedford Hills Free Library	26 Main St	Bedford Hills	NY	10507	Libraries	Westchester County GIS
Bedford Hills P.O.	60 Adams Street	Bedford Hills	NY	10507	Post Offices	Westchester County GIS
Bedford P.O.	40 Village Green	Bedford	NY	10506	Post Offices	Westchester County GIS
Bedford Pharmacy	424 Old Post Rd	Bedford	NY	10506	pharmacy	Fidelis
Bedford Village Senior Citizen - Presbyterian Church	44 Village Green	Bedford	NY	10506	Senior Centers	Westchester County GIS
Bedford, Lewisboro, Pound Ridge Drug Abuse Prevention Council	Box 741 Village Green	Bedford	NY	10506	Family Service Resources	Westchester County GIS
Berkeley College	40 West Red Oak Lane	W Harrison	NY	10604	Universities	Westchester County GIS
Beth Israel Nursing Home	12 Tibbits Ave.	White Plains	NY	10606	Nursing Homes	Westchester County GIS
Bethel Baptist Church	37 Maple Avenue	Mount Kisco	NY	10549	Food Pantries	Westchester County GIS
Bloomingdale's	175 Bloomingdale Rd	White Plains	NY	10605	retail	Databook
Cardinal McCloskey	2 Holland Avenue	White Plains	NY	10603	Family Service Resources	Westchester County GIS
Cerebral Palsy of Westchester	1186 King Street	Rye Brook	NY	10573	Family Service Resources	Westchester County GIS
Children's Rehabilitation Center	317 North Street	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Children's Rehabilitation Center	318 North Street	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Children's Rehabilitation Center	319 North Street	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Children's Rehabilitation Center	320 North Street	White Plains	NY	10605	Family Service Resources	Westchester County GIS
City Center	19 Mamaroneck Ave	White Plains	NY	0	retail	Databook
Columbia University School of Social Work	735 Anderson Hill Road	Purchase	NY	10577	Universities	Westchester County GIS
Community Based Services, Inc.	3 Fields Lane	North Salem	NY	10560	Family Service Resources	Westchester County GIS
Community Living Corporation	105 South Bedford Road, Suite 300	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Cross River P.O.	20 North Salem Road	Cross River	NY	10518	Post Offices	Westchester County GIS
Croton Falls P.O.	5 Front Street	Croton Falls	NY	10519	Post Offices	Westchester County GIS
CVS	10 S Bedford Rd.	Mount Kisco	NY	10549	pharmacy	web
CVS	325 Route 100	Somers	NY	10589	pharmacy	web
CVS	360 N Bedford Rd.	Mount Kisco	NY	10549	pharmacy	ALOFT survey
Diversified Investment Advisor	4 Manhattanville Rd	Purchase	NY	10577	maj emp	Databook
Drug Mart of Bedford Hills	737 Beford Rd	Bedford Hills	NY	10507	pharmacy	Fidelis
Ecumenical Emergency Food Pantry	3 Carhart Avenue	White Plains	NY	10605	Food Pantries	Westchester County GIS
El Centro Hispano Inc.	346 South Lexington Avenue	White Plains	NY	10606	Food Pantries	Westchester County GIS
Family Information and Referral Service Team, Inc.	470 Mamaroneck Ave.	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Family Services of Westchester, Inc.	1 Summit Avenue	White Plains	NY	10606	Family Service Resources	Westchester County GIS
Family Services of Westchester, Inc.	344 Main Street, Room 303	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Family Ties	112 East Post Rd, 3rd Floor	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Fortunoff	1 Maple Av	White Plains	NY	10605	retail	Databook
Friends of Karen	N/A	Croton Falls	NY	10519	Family Service Resources	Westchester County GIS
Galleria Mall	100 Main St	White Plains	NY	10601	retail	Databook
Goldens Bridge P.O.	Route 22	Goldens Bridge	NY	10526	Post Offices	Westchester County GIS
Grace Church Community Center	86 East Post Road	White Plains	NY	10601	Shelters	Westchester County GIS

Sources: Westchester County's GIS website, ALOFT survey, Westchester County Databook 2008, Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley

Name	Address	City	State	Zip	Description	Source
Grace Church Community Center	33 Church Street	White Plains	NY	10601	Shelters	Westchester County GIS
Grace Church Community Center, Inc.	171 East Post Road, Room 218	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Grace Church Community Center, Inc.	52 North Broadway	White Plains	NY	10603	Family Service Resources	Westchester County GIS
Grace Church Community Center, Inc.	86 E. Post Road	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Granite Springs P.O.	139 Mahopac Avenue	Somers	NY	10527	Post Offices	Westchester County GIS
Gristede's Supermarket	102 Somers Rd	Somers	NY	10589	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
Grow	N/A	White Plains	NY	10602	Family Service Resources	Westchester County GIS
Halfway House of Wetchester Inc.	14 Longview Avenue	White Plains	NY	10605	Family Service Resources	Westchester County GIS
HCBS Waiver (Home and Community Based Waiver Services)	344 E Main St	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Health Consultants, Inc.	10 Mitchell Place	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Hebrew Institute Senior Citizens Club	20 Greenridge Avenue	White Plains	NY	10605	Senior Centers	Westchester County GIS
Home Health Services of WJCS, Inc.	845 North Broadway	White Plains	NY	10603	Family Service Resources	Westchester County GIS
IBM Watson Research Center	1101 Kitchawan Rd	Yorktown Heights	NY	10598	maj emp	Databook
Jefferson Valley Mall	650 Lee Blvd	Yorktown	NY	10598	retail	Coord Plan
JNR Pharmacy of South Salem	222 Oakridge Dr	South Salem	NY	10590	pharmacy	Fidelis
Katonah P.O.	292 Katonah Avenue	Katonah	NY	10536	Post Offices	Westchester County GIS
Katonah Pharmacy - Legend	294 Katonah Ave	Katonah	NY	10536	pharmacy	web
Katonah Village Libary	26 Bedford Road	Katonah	NY	10536	Libraries	Westchester County GIS
Kohls	777 Bedford Rd	Bedford Hills	NY	10507	retail	ALOFT survey
Leonard Park Pharmacy Inc.	360 N Bedford Rd.	Mount Kisco	NY	0	pharmacy	http://www.westchestertowns.com/htm/lnk/Link0036.html
Lewisboro Senior Citizens	65 Old Bedford Road	Goldens Bridge	NY	10526	Senior Centers	Westchester County GIS
Lexington Center for Recovery	24 Smith Avenue	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Lexington Center for Recovery	7-11 Legion Drive	Valhalla	NY	10595	Family Service Resources	Westchester County GIS
Lincolndale P.O.	152 Route 202	Somers	NY	10540	Post Offices	Westchester County GIS
Manhattanville College	2900 Purchase Street	Purchase	NY	10577	Universities	Westchester County GIS
Manufacturer's Outlet Center	195 N Bedford Rd	Mount Kisco	NY	10549	retail	Databook
Maple House	94-100 Maple Avenue	Mount Kisco	NY	10549	Shelters	Westchester County GIS
Mastercard, Inc.	2000 Purchase St	Purchase	NY	10577	maj emp	Databook
Mental Health Association of Westchester County, Inc.	29 Sterling Avenue	White Plains	NY	10606	Family Service Resources	Westchester County GIS
Mental Health Association of Westchester County, Inc.	344 Main Street	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Mercy College-White Plains	277 Martine Avenue	Dobbs Ferry	NY	10522	Universities	Westchester County GIS
Mercy College-Yorktown Campus	2651 Strang Blvd	Mohegan Lake	NY	10547	Universities	Westchester County GIS
Morgan Stanley	2000 Westchester Ave	Purchase	NY	0	maj emp	Databook
Mount Kisco Interfaith Food Pantry	35 Main Street	Mount Kisco	NY	10549	Food Pantries	Westchester County GIS
Mount Kisco Public Library	100 Main St	Mount Kisco	NY	10549	Libraries	Westchester County GIS
Mount Kisco Senior Group	351 Main Street	Mount Kisco	NY	10549	Senior Centers	Westchester County GIS
Mt. Kisco District Office	118 North Bedford Road	Mt. Kisco	NY	10549	Dept. of Health offices	Westchester County GIS
Mt. Kisco P.O.	2 Morgan Drive	Mt. Kisco	NY	10549	Post Offices	Westchester County GIS
N. Westchester Prescription Center - Legend	19 E Main St	Mount Kisco	NY	10549	pharmacy	Fidelis
New York University-Leonard N. Stern School of Bus	125 Purchase Street	Purchase	NY	10577	Universities	Westchester County GIS
North Castle Adult Club	85 Cox Avenue	Armonk	NY	10504	Senior Centers	Westchester County GIS
North Salem Free Library	276 Titicus Rd (Route 116)	North Salem	NY	10560	Libraries	Westchester County GIS
North Salem P.O.	56 June Road	North Salem	NY	10560	Post Offices	Westchester County GIS
North Salem Senior Citizens Club- Town Hall	266 Titicus Road	North Salem	NY	10560	Senior Centers	Westchester County GIS
North Salem Senior Citizens Club-Purdy's Methodist Church	106 Titicus Road	Purdys	NY	10560	Senior Centers	Westchester County GIS
North White Plains Branch Library	10 Clove Rd	North White Plains	NY	10603	Libraries	Westchester County GIS
Northern Westchester Guidance Clinic	344 Main Street	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Northern Westchester Hospital Center	400 East Main Street	Mount Kisco	NY	10549	Hospitals	Westchester County GIS
Northern Westchester Prescription Center	19 E Main St	Mount Kisco	NY	10549	pharmacy	http://www.westchestertowns.com/htm/lnk/Link0036.html
NYS Dept. of Labor Satellite Offices	120 Bloomingdale Road	White Plains	NY	10605	Employment Centers	Westchester County GIS

Sources: Westchester County's GIS website, ALOFT survey, Westchester County Databook 2008, Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley

Name	Address	City	State	Zip	Description	Source
Old Guard of White Plains YMCA	250 Mamaroneck Avenue	White Plains	NY	10605	Senior Centers	Westchester County GIS
Pace University-White Plains Graduate Center	1 Martine Avenue	White Plains	NY	10606	Universities	Westchester County GIS
Pace University-White Plains School of Law	78 North Broadway	White Plains	NY	10603	Universities	Westchester County GIS
Peach Lake Market	1 Dingle Ridge Rd	North Salem	NY	10560	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
Pepsi Co Inc.	700 Anderson Hill Rd	Purchase	NY	10528	maj emp	Databook
Pound Ridge P.O.	57 Westchester Avenue	Pound Ridge	NY	10576	Post Offices	Westchester County GIS
Pound Ridge Seniors	79 Westchester Avenue	Pound Ridge	NY	10576	Senior Centers	Westchester County GIS
Purchase Free Library	3093 Purchase Street	Purchase	NY	10577	Libraries	Westchester County GIS
Purchase P.O.	3003 Purchase Street	Purchase	NY	10577	Post Offices	Westchester County GIS
Purdys Station P.O.	3 Main Street	Purdys	NY	10578	Post Offices	Westchester County GIS
QUIP (Quality Information Processing)	95 Church Street, Suite 200	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Reader's Digest Assn., Inc.	480 Bedford Rd	Pleasantville	NY	10570	maj emp	Databook
Rite Aid	55 S Moger Ave	Mount Kisco	NY	10549	pharmacy	web
Robert Jacobsen Surgical Pharmacy	359 E Main St	Mount Kisco	NY	10549	pharmacy	Fidelis
Rockland Children's Psychiatric Cenrer (RCPC)	1606 Old Orchard Street	White Plains	NY	10604	Family Service Resources	Westchester County GIS
Rose Hill Shopping Center	660 Columbus Av	Thornwodd	NY	10594	retail	Databook
Salvation Army	16 Sterling Avenue	White Plains	NY	10606	Food Pantries	Westchester County GIS
Scott's Corner Market	55 Westchester Av	Pound Ridge	NY	10576	grocery	ALOFT survey
Search for Change	95 Church Street, Suite 20	White Plains	NY	10601	Shelters	Westchester County GIS
Shenorock P.O.	18 Shenorock Drive	Shenorock	NY	10587	Post Offices	Westchester County GIS
Shoprite Supermarket	747 Bedford Rd	Bedford Hills	NY	10507	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
Shrub Oak Seniors- Yorktown Community Center	1974 Commerce Street	Yorktown	NY	10598	Senior Centers	Westchester County GIS
Somers Commons	80 Route 6	Somers	NY	10505	retail	Databook
Somers Library	Rt. 139 & Reis Park (P.O. Box 443)	Somers	NY	10589	Libraries	Westchester County GIS
Somers Manor Nursing Home	189 Rte 100	Somers	NY	10589	Nursing Homes	Westchester County GIS
Somers P.O.	325 Route 100	Somers	NY	10589	Post Offices	Westchester County GIS
Somers Pharmacy & Surgical	336 Route 202	Somers	NY	10589	pharmacy	http://www.westchestertowns.com/htm/lnk/Link0036.html
South Salem Library	15 Main St	South Salem	NY	10590	Libraries	Westchester County GIS
South Salem P.O.	17 Main Street	South Salem	NY	10590	Post Offices	Westchester County GIS
State University of New York at Purchase	735 Anderson Hill Road	Purchase	NY	10577	Universities	Westchester County GIS
Stewarts Market	1 Court Rd	Bedford	NY	10506	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
Stop & Shop	80 Route #6	Somers	NY	10589	grocery	web
Target	195 N Bedford Rd	Mount Kisco	NY	10549	big box retail	Fidelis
Tefft Business School	4 Lyon Place	White Plains	NY	10601	Universities	Westchester County GIS
The Center for Career Freedom, Inc.	One East Post Road	White Plains	NY	10601	Family Service Resources	Westchester County GIS
The Center For Preventive Psychiatry	19 Greenridge Avenue	White Plains	NY	10605	Family Service Resources	Westchester County GIS
The Chubb Institute	190 E. Post Road	White Plains	NY	10601	Universities	Westchester County GIS
The Community Center	84 Bedford Road	Katonah	NY	10536	Food Pantries	Westchester County GIS
The Country Farmer	3 Bloomer Rd	North Salem	NY	10560	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
The Country House in Westchester	2000 Baldwin Rd.	Yorktown Hts.	NY	10598	Adult Homes	Westchester County GIS
The New York Presbyterian Hospital	21 Bloomingdale Road	White Plains	NY	10605	Family Service Resources	Westchester County GIS
The Pavillion at White Plains	60 S Broadway	White Plains	NY	0	retail	Databook
The Summer Place	21 Bloomingdale Road	White Plains	NY	10605	Food Pantries	Westchester County GIS
The Week-end Center	24 Smith Avenue	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
The Westchester	125 Westchester Av	White Plains	NY	10601	retail	Databook
Town of Bedford- R&P Senior Program	21 Park Avenue	Bedford Hills	NY	10507	Senior Centers	Westchester County GIS
Triangle	20 Triangle Center	Yorktown Heights	NY	10598	retail	Databook
Urban League of Westchester, Inc.	61 Mitchell Place	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Valhalla P.O.	10 Cleveland Street	Valhalla	NY	10595	Post Offices	Westchester County GIS
Vaughn Glanton Employment Residence	22 Tarrytown Road	White Plains	NY	10607	Shelters	Westchester County GIS

Sources: Westchester County's GIS website, ALOFT survey, Westchester County Databook 2008, Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley

Name	Address	City	State	Zip	Description	Source
Vista Market	469 Smith Ridge Rd	South Salem	NY	10590	grocery	http://www.westchestertowns.com/htm/lnk/Link0154.html
Volunteers of America- Airport Shelter	32 Loop Road	White Plains	NY	10604	Shelters	Westchester County GIS
Waccabuc P.O.	2 Post Office Road	Waccabuc	NY	10597	Post Offices	Westchester County GIS
Waccabuc River Rest Home	15 Waccabuc River Lane	Lewisboro	NY	10590	Adult Homes	Westchester County GIS
Wal-Mart	275 Main St	White Plains	NY	10601	big box retail	web
West Harrison Branch Library	2 East Madison St	West Harrison	NY	10604	Libraries	Westchester County GIS
West Harrison Senior Citizens	251 Underhill Avenue	White Plains	NY	10604	Senior Centers	Westchester County GIS
Westchester ARC	121 Westmoreland Avenue	White Plains	NY	10606	Family Service Resources	Westchester County GIS
Westchester ARC	360 Mamaroneck Avenue	White Plains	NY	10605	Family Service Resources	Westchester County GIS
Westchester ARC	39 Westmoreland Avenue	White Plains	NY	10606	Family Service Resources	Westchester County GIS
Westchester ARC	699 Main Street	Mount Kisco	NY	10549	Family Service Resources	Westchester County GIS
Westchester Arts Council	31 Mamaroneck Avenue	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Westchester Department of Community Mental Health	112 East Post Rd, 2nd Floor	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Westchester Independent Living Center (WILC)	200 Hamilton Ave, 2nd Floor	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Westchester Jewish Community Services	51 Babbitt Road	Bedford Hills	NY	10507	Family Service Resources	Westchester County GIS
Westchester Jewish Community Services (WJCS)	845 North Broadway	White Plains	NY	10603	Family Service Resources	Westchester County GIS
Westchester Jewish Community Services (WJCS)	901 North Broadway	White Plains	NY	10603	Family Service Resources	Westchester County GIS
Westchester Lighthouse	44 Church Street	White Plains	NY	10601	Senior Centers	Westchester County GIS
Westchester One Stop Employment Center	143 Grand Street	White Plains	NY	10601	Employment Centers	Westchester County GIS
WESTHAB	123 East Post Road	White Plains	NY	10601	Shelters	Westchester County GIS
Westhab Longview House	13 Longview Avenue	White Plains	NY	10605	Shelters	Westchester County GIS
White Plains - East	173 Underhill Avenue	White Plains	NY	10604	Post Offices	Westchester County GIS
White Plains CAP	70 Ferris Avenue	White Plains	NY	10603	Food Pantries	Westchester County GIS
White Plains District Office	85 Court Street	White Plains	NY	10601	Dept. of Health offices	Westchester County GIS
White Plains District Office	85 Court Street	White Plains	NY	10601	Family Service Resources	Westchester County GIS
White Plains Hospital Center	41 E Post Rd	White Plains	NY	10601	Family Service Resources	Westchester County GIS
White Plains Hospital Medical Center	Davis Avenue at East Pond Road	White Plains	NY	10601	Hospitals	Westchester County GIS
White Plains Mall	20 Barker Av	White Plains	NY	10601	retail	Databook
White Plains P.O.	620 Mamaroneck Avenue	White Plains	NY	10605	Post Offices	Westchester County GIS
White Plains P.O.	100 Fisher Avenue	White Plains	NY	10606	Post Offices	Westchester County GIS
White Plains P.O.	585 North Broadway	White Plains	NY	10603	Post Offices	Westchester County GIS
White Plains Probation Department	112 East Post Road, 3rd floor	White Plains	NY	10601	Family Service Resources	Westchester County GIS
White Plains Public Library	100 Martine Ave	White Plains	NY	10601	Libraries	Westchester County GIS
White Plains Senior Center	65 Mitchell Place	White Plains	NY	10601	Senior Centers	Westchester County GIS
White Plains Youth Bureau (City of)	11 Amherst Place	White Plains	NY	10601	Family Service Resources	Westchester County GIS
Woodcrest Home for Adults	15 Woodcrest Ave.	White Plains	NY	10604	Nursing Homes	Westchester County GIS
YAI/ National Institute for People with Disabilities	65 Lake Street	White Plains	NY	10604	Family Service Resources	Westchester County GIS
Yorktown Chapter I	1965 Allan Avenue	Yorktown Heights	NY	10598	Senior Centers	Westchester County GIS
Yorktown Chapter II- Yorktown Community Center	1974 Commerce Street	Yorktown	NY	10598	Senior Centers	Westchester County GIS
Yorktown Community Help	1974 Commerce Street	Yorktown Heights	NY	10598	Food Pantries	Westchester County GIS
Yorktown Green Shopping Center	347 Downing Dr	Yorktown	NY	10598	retail	Databook
Yorktown Heights P.O.	2020 Maple Hill	Yorktown Heights	NY	10598	Post Offices	Westchester County GIS
Yorktown Nutrition Center	1974 Commerce Street	Yorktown	NY	10598	Senior Centers	Westchester County GIS
YWCA of White Plains and Central Westchester	515 North Street	White Plains	NY	10605	Family Service Resources	Westchester County GIS
YWCA of White Plains and Central Westchester	515 North Street	White Plains	NY	10605	Senior Centers	Westchester County GIS
YWCA White Plains	69 North Broadway	White Plains	NY	10603	Food Pantries	Westchester County GIS
YWCA White Plains	69 North Broadway	White Plains	NY	10603	Shelters	Westchester County GIS

Sources: Westchester County's GIS website, ALOFT survey, Westchester County Databook 2008, Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Final Report - Appendix 2

Combined Technical Memoranda #2 & 3: Service Design Alternatives and Preferred Alternatives

Howard/Stein-Hudson Associates, Inc.
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Westchester County Department of Transportation

Westchester County Department of Senior Programs and Services

Design of a Demand Responsive Transportation Service for Northeast Westchester County

Combined Technical Memo #2 & 3

Service Design Alternatives and Preferred Alternatives

May 2010

Prepared by:

TranSystems

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1.0 Introduction

The geographic area covered by this project includes the seven communities in the northeast section of Westchester County: the towns of Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, and Somers, and the Village and Town of Mount Kisco. These communities make up the Northeast Region of the Livable Communities Connection (LCC) initiative of the Westchester County Department of Senior Programs and Services (WCDSPS), co-manager of this project together with the Westchester County Department of Transportation (WCDOT). A third Westchester County partner in the project is Active Living Over Fifty, Inc. (ALOFT), LCC Coordinator for the Northeast region.

The objective of the project is to design a demand responsive transportation system that will address the mobility needs of three target populations: older adults, persons with disabilities, and individuals with low incomes (particularly home care workers) in the project area. Based on previous work conducted by ALOFT and others, initial thoughts about potential mobility solutions for this region included a call center staffed by a Mobility Manager(s), coordination of existing services, and development of new service to bridge transportation service gaps.

This memo presents a proposed vision for Mobility Management for northeast Westchester County, and describes service design alternatives for various components of the Mobility Management system. Analysis and stakeholder input that led to the identification of specific components are summarized in Section 2. The Mobility Management vision and design alternatives are presented in Section 3. Section 4 describes discussions of Mobility Management components by the project's stakeholder Advisory Council and presents the priorities established by the group among the components. Section 5 summarizes next steps in the design process.

2.0 Summary of Service Gaps and Mobility Challenges

As mentioned above, the purpose of this project is to address mobility challenges faced by individuals living and/or working in northeast Westchester County. Gaps in the transportation network and the resulting challenges are summarized below.

2.1 Demographic Characteristics

Technical Memo #1, *Demographic Analysis and Inventory of Transportation Services*, describes the density and demographic characteristics of the project area communities, and presents maps that show the residential locations of the three target populations in relation to key destinations for work, shopping, human service program, medical, and personal business trips.

Figure 1 summarizes characteristics of the project area communities that typically indicate the need for some type of public transportation, or options for individuals who cannot, or choose not to, drive. Statistics are based on information from the 2000 U.S. Census.

Eighteen percent of adults were age 60 and older in Westchester County in 2000, as compared to 19 percent in New York State. Percentages of older adults in the project area communities ranged from 15 percent or less in most towns to 17 percent in Pound Ridge, 19 percent in North Salem, and 24 percent in Somers. The high percentage of older adults in Somers is likely due in part to the Heritage Hills planned community, which set a minimum age for residents when first constructed.

Persons with disabilities made up 16 percent of the Westchester County population in 2000, as compared to 19 percent in New York State. Most of the project area communities contained a lower percentage of

Figure 1: Demographic Characteristics in the Project Area

- **Older adults (60 and older)**
  - Westchester County, 18%; NYS 19%
  - Somers 24%, North Salem 19%, Pound Ridge 17%
  - Others about 15% or less
- **Persons with disabilities**
  - Westchester County,16%; NYS 19%
  - Mt. Kisco 17%
  - Others 13% or less
- **Households with income <$25, 000**
  - Westchester County, 20%; NYS, 30%
  - Mt. Kisco, 21%
  - Others 11% or less
- **Population density**
  - Low in most of northeast Westchester County
  - Exceptions: Mt. Kisco, parts of Somers and North Castle

this population group – 13 percent or less. The exception is Mount Kisco, in which 17 percent of the population in 2000 reported having a disability.

Households with annual incomes below $25,000 in 2000 made up 20 percent of the county's households, a much lower percentage than New York State's 30 percent. A lower percentage of households in most of the project area towns fell into this income category—generally 11 percent or less. Mt. Kisco again is the exception, with 21 percent of its households earning less than $25,000 in 2000.

The other characteristic that is important when considering transportation needs is population density, which can be used as a guideline to the effectiveness of different types of public transportation service. Ranging from a low of 201 persons per square mile in the Town of Pound Ridge to a high of 569 persons per square mile in the Town of Somers, most of the project area communities are not densely populated. The exceptions are portions of Somers and the Town of North Castle and Mount Kisco, which covers a small area and contained 3,189 persons per square mile in 2000. In contrast, population density for the county as a whole in 2000 was 1,847 persons per square mile.

To get a sense of travel patterns, the density of each of the three target populations was mapped in relation to the addresses of a variety of major destinations in the project area and just outside its borders. Destinations were identified through the Westchester County Databook 2008, the county's GIS website, Internet research, the Coordinated Public Transit-Human Services Transportation Plan for the Lower Hudson Valley and other sources. Destinations include hospitals, community centers, assisted living facilities, grocery stores and other retail locations, major employers, universities, and social service and government offices, among others. While some destinations of various types are scattered throughout the project area towns, most destinations are clustered in Mount Kisco and just south of the project area in White Plains.

Figure 2 is one example of the maps that were prepared, and illustrates the need for transportation for those living in northeast Westchester County. The map shows adults age 60 and over per square mile, at the Census block level, together with the key destinations. There are areas in which older adults are concentrated, particularly in Somers, Bedford, and North Castle that are removed from the location of these destinations.

2.2 Existing Transportation Services

Technical Memo #1 also includes an inventory of existing transportation services in northeast Westchester. The inventory was based initially on responses to the survey conducted by ALOFT in fall 2009 and providers listed in the *Coordinated Public Transit—Human Services Transportation Plan for the Lower Hudson Valley* (Coordinated Plan). The initial list was revised based on comments from stakeholders and Steering Committee members and information collected by ALOFT in small group meetings conducted in spring 2010 and questionnaires completed by participants.

The inventory is summarized in Figure 3. Limited fixed route bus and rail service is available to residents of the project area communities. These include portions of two bus routes operated by the Westchester County Department of Transportation Bee-Line; a shuttle operated by the Housatonic Area Regional Transit (HART) from Ridgefield, CT; and MTA Metro-North commuter rail service. Bee-Line ParaTransit also provides ADA complementary paratransit service to eligible individuals with disabilities. Service is available in the project area and throughout the county during core service hours: Monday-Friday, 6:00 am to 7:00 pm, and Saturday, 8:00 am – 7:00 pm. For bus routes that operate additional hours of service, ParaTransit service is available within ¾ of a mile of those routes during the hours in which they operate.

Figure 2: Key Destinations and Density of Older Adults

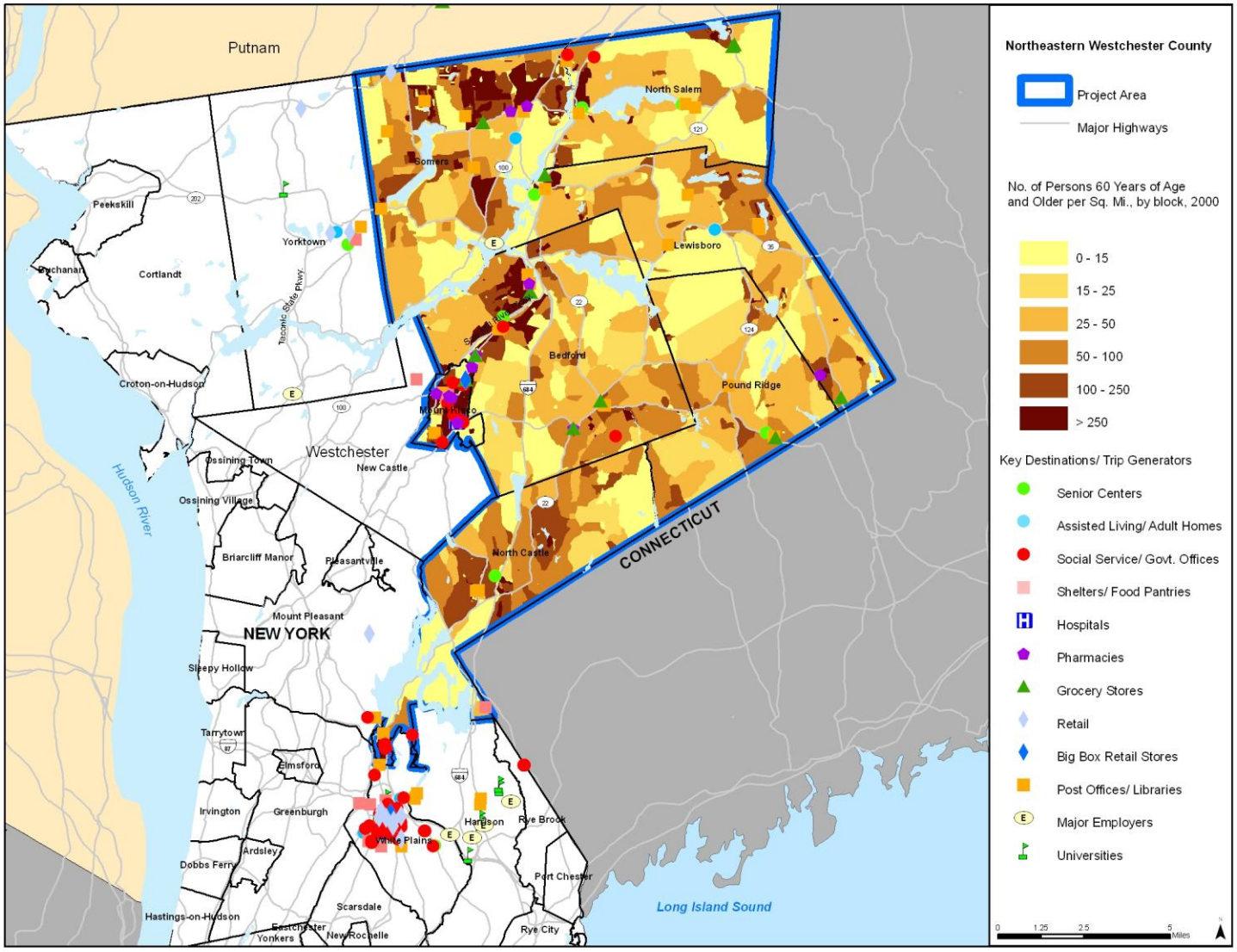

Figure 3: Transportation Services in the Project Area

- **Fixed route bus service**
  - Portions of Bee-Line Routes 12, 19
  - HART shuttle Katonah to Ridgefield, CT
  - MTA Metro-North Railroad
- **Bee-Line ADA Paratransit service**
  - Service within ¾ mile of fixed routes, same days and hours
  - Countywide during core hours
    - Mon -Fri, 6a – 7p

      Sat, 8a – 7p
- **7 municipal senior transportation programs**
  - Within town/village limits
  - Town limits and surrounding area
  - Town and specific destinations
  - Most operate 1-2 vehicles; Somers operates 4
- **12 Private providers**
  - Non-profit
  - For profit
- **10 volunteer ride programs**

In northeast Westchester, additional ParaTransit service is provided during evening hours on weekdays within ¾ of a mile of Route 12.

In addition to public fixed route and ADA paratransit service, demand responsive service is provided by a number of entities in the project area. All seven municipalities operate demand responsive services, typically for older adults, that provide access to community centers, shopping, and/or health care facilities. Services typically provide service during limited days and hours using 1-2 vehicles (the Town of Somers operates four vehicles). Services either remain within town boundaries or in the immediate vicinity, or travel to specific destinations outside of the community, such as shopping locations or medical facilities. Twelve for-profit and non-profit providers operate taxi, ambulette, or human service program transportation. Finally, 10 volunteer ride programs are in operation, some by municipalities or Friends in Service Helping (FISH), and many by churches and synagogues.

Gaps in transportation services in the northeast section of the county may be summarized as follows:

- Limited fixed route service increases reliance on demand responsive, agency, and volunteer services
- Evening, weekend service is limited
- Inter-town trips are difficult or impossible
- Eligible individuals or trip purposes are usually restricted
    - More services are open to seniors than other groups
    - Medical, shopping trips predominate

These gaps are also noted in the portion of the Coordinated Plan that pertains to Westchester County.

2.3 Comments from Stakeholders

At project kick-off meetings with the Steering Committee and stakeholder Advisory Council, held on December 18, 2009 and January 12, 2010, respectively, participants were asked about mobility challenges faced by older adults, persons with disabilities, and individuals with low income in the project area. Comments are summarized below.

- The low density of population and development in the area makes fixed route service inappropriate, other services expensive to provide.
- Aging in place is difficult without transportation options.
- Home health care workers need transportation to clients' homes in northeast Westchester. This is a significant problem.
- Commuters need access to Metro-North stations.
- Unsubsidized fares are unaffordable for some.
- East/west travel options are limited.
- There is a general lack of information about services that are available and how to use them.

Steering Committee and Advisory Council members were also asked for their thoughts about potential solutions to mobility challenges. Suggestions that were widely agreed upon include the following:

- Develop a central call center for the provision of information about transportation options

- Utilize existing transportation resources
- Make resources go farther by coordinating the use of vehicles and other resources among agencies, organizations, and municipalities
- Consider new services sponsored by municipalities and/or agencies, such as service between towns, train stations or the development of a transportation voucher program
- Strengthen existing volunteer ride programs by finding more volunteer drivers, pursuing reimbursement for volunteers, and publicizing the programs

Summaries of the December 18, 2009 Steering Committee and January 12, 2010 Advisory Council meetings that include complete lists of comments are attached in Appendix A.

3.0 Mobility Management in Northeast Westchester

This section introduces the concept of Mobility Management and describes how it can help to address the mobility challenges of the three target populations in northeast Westchester County.

3.1 Mobility Management

Mobility Management is an umbrella term that has been used in the past several years in the context of the federal transit assistance programs. It encompasses approaches and activities that have been in use for years, many related to improving coordination among different transportation services and programs. Mobility Management usually involves some or all of these elements:

- Coordination among providers
- A diversity of services that are available to meet a variety of transportation needs
- A focus on serving specific markets or meeting individuals' needs, rather than the public at large
- A focus on moving people, rather than on specific modes of transportation
- Working towards the goal of increasing the efficiency of resource utilization

Technology, such as automated reservations/scheduling/dispatching systems for paratransit services, automated vehicle location systems, onboard vehicle data collection and communication systems, and automated fare payment options, can facilitate mobility management.

Because the term covers a broad range of activities, it is used with different meanings. Mobility Management can have an internal or external focus. Internal Mobility Managers are typically housed at a transit authority or transportation organization, and provide service information, trip planning, travel training, and other services to their own customers or potential customers. External Mobility Managers can be transit authorities that provide such services to the general public and/or clients of agencies, or organizations that provide services for a variety of users. Another distinction is between a Mobility Manager that is an organization that provides information and services and works to build networks and foster coordination among transportation providers and other organizations and an individual Mobility Manager who acts as a travel agent to help customers identify transportation options and plan trips.

3.2 Mobility Management Vision for Northeast Westchester

Based on the density and demographic characteristics of the project area communities, stakeholder comments, and previous work by ALOFT and others, the vision for improving mobility in northeast Westchester County includes the following:

- One call center that connects residents with information about existing services
  - Public fixed route service (bus, train)
  - Public demand responsive service (ADA paratransit, municipal services)
  - Volunteer ride programs
  - Private providers (taxi, ambulette, other)
- Trip planning and other assistance would be provided
- Assistance with fares may be available through a voucher program
- The call center and support services would be overseen by a Mobility Manager

This vision was developed for inclusion in a grant application prepared by ALOFT and submitted to the New York Metropolitan Transportation Council (NYMTC) for Job Access and Reverse Commute (JARC) and New Freedom programs. Given its mission, previous work in Northeast Westchester County, and JARC/New Freedom grant history, ALOFT is a logical choice for an overall Mobility Manager for the region. Other entities may have the interest and qualifications to take on responsibility for specific programs or services, but ALOFT would oversee those efforts. ALOFT applied for funding in the amount of $990,000 to implement a number of Mobility Management activities in northeast Westchester over the next three years.

3.3 Mobility Management Components

As envisioned for northeast Westchester, Mobility Management incorporates a number of different components. Each component is described below.

Call Center

The Mobility Manager would staff the northeast Westchester transportation call center. One of the Mobility Manager's primary functions would be to collect current information from transportation providers and update it periodically. Information would include transportation characteristics such as service area, days and hours of service, eligible individuals and trip types, type of vehicles used, level of assistance provided, fares, and accessibility.

Information would be provided to callers over the phone. Additionally, transportation information could be provided in a printed directory and/or posted on a website for access over the Internet.

Mobility Manager staff would also help callers to identify transportation options for which they are eligible and that meet their needs for a particular trip. Alternative approaches beyond the provision of information about transportation services include the following:

- Provision of the phone number of the appropriate transportation provider to the customer
- Placement of a trip reservation with the provider on behalf of the customer by Mobility Manager staff
- Direct reservation of a trip by the Mobility Manager, who is also a centralized reservations/scheduling/dispatching agent for a number of transportation providers

These alternatives could be phased in over time by the Mobility Manager.

The centralized call center would be an obvious benefit to residents of northeast Westchester, who could obtain assistance with trip planning and possibly trip reservations with one call, and would not have to spend time researching options and navigating eligibility requirements and service characteristics to find an option that could meet their needs. The information about transportation services provided through the call center would also benefit human service agency staff members who must assist clients with access to services or programs. The call center would also facilitate increased use of existing services to meet more mobility needs. Finally, as the repository of information about transportation services and transportation needs, the Mobility Manager would have a perfect opportunity to identify opportunities for further coordination among providers.

Coordinated Home Care Worker Transportation

As mentioned in Steering Committee and Advisory Council meetings, older adults in northeast Westchester are often unable to obtain needed in-home health care or other assistance because workers who live outside of the area are not able to find transportation to clients' homes. Several agencies that hire and place home health aides with clients subsidize train or taxi fares for employees and/or operate vans or contract for transportation services that pick employees up at central points and take them to central drop-off points or clients' homes. These services are not enough to overcome transportation service gaps, however.

Coordinating efforts among home care agencies could increase transportation options for more workers and stretch the resources currently being applied by the agencies to this problem. Options for coordination include sharing of empty seats on agency vans with workers employed by other agencies, joint contracting with a private for-profit or non-profit transportation provider to transport workers from all participating agencies to northeast Westchester, and operation of transportation services for employees of all agencies by one lead agency. Workers could be picked up at central spots and transported to a central drop-off point in northeast Westchester, or to clients' homes.

The Mobility Manager could support coordinated home care worker transportation by overseeing a joint contract, coordinating functions such as driver training or vehicle maintenance services, conducting outreach to additional employers to join the coordination effort, matching workers with volunteer or taxi rides for the last leg of the work trip, and/or administering a transportation voucher program to partially offset the cost of transportation for workers.

Increased transportation options for home care workers would benefit not only workers, who would be able to take jobs with clients in northeast Westchester, but also older adults who are not able to obtain the in-home services they need because workers are unable to get to their homes. Home care agencies would also benefit from economies of scale that would result from working with other agencies, and from the placement of more employees in positions in the project area. Agencies that are currently operating van services and would prefer not to do so would be able to obtain transportation for employees in a manner that would allow them to focus more on their primary mission.

Consolidated Municipal Demand Response Services

At present, all seven communities in the project area operate some level of demand responsive service for eligible residents. Eligibility is generally restricted to older adults, and days/hours of service, trip purposes, and service areas are limited. Similar to home care agencies, municipalities could stretch their transportation resources and improve mobility for their residents by coordinating services with each other.

Instead of the individual small transportation programs that are operated by the towns, one consolidated demand response service would serve the northeast Westchester region, allowing inter-town travel. Group trips to community centers and for shopping and outings, and individual trips for appointments and other trip purposes would be provided. Either one town or a contracted private or non-profit provider could operate the service on behalf of all towns.

An alternative to full consolidation of municipal transportation programs would be the creation of specific inter-town routes or services as an addition to separate town programs. An example of inter-town coordination is the shared long-distance medical transportation service operated by the Towns of East Hampton and Southampton in Suffolk County. Each town operates the service on specific days of the week and picks up residents in both communities. Cost-sharing arrangements are informal; each town pays for the cost of service on the days on which it is responsible for operating it.

The Mobility Manager could play the same support role for municipalities as for home care agencies—contract oversight, coordination of driver training or vehicle maintenance services, customer service, and administration of a voucher program.

A coordinated transportation service would offer residents the ability to travel to destinations outside of their home community, and for some, increased days and hours of service. More efficient use would be made of the existing level of municipal transportation resources.

A coordinated municipal transportation program could also be used to provide service to and from Metro-North train stations during early morning and evening commuting hours, to address a need raised by stakeholders at the first Advisory Council meeting. Service could be provided between designated locations and the station on a schedule, or individuals could make reservations in advance and be picked up or dropped off at their homes. The program might also provide regularly scheduled shuttle service between towns.

Coordinated Volunteer Ride Programs

Volunteer rides are a cost-effective way to provide mobility in low-density areas or where public transportation services are limited. The small volunteer ride programs that are in operation in the project area have the potential to meet more mobility needs if they were stronger and expanded.

The programs would be strengthened by the central performance of the following functions on behalf of all programs by the Mobility Manager:

- Volunteer driver (and escort) recruitment, training, and recognition
- Pursuit of grant funds as a source of reimbursement for drivers
- Public information about the availability of volunteer rides
- Research into and options for resolving liability and insurance issues, which are often raised in connection with volunteer ride programs in the project area

Matching of individuals who have trip needs with a volunteer driver is another function which could be done centrally by the Mobility Manager.

In addition to the ability to meet more trip needs, centralizing volunteer ride programs functions would also reduce the duplication of effort that is currently spent by the various programs on the same activities.

New Transportation Voucher Program

A new transportation voucher program would offer a cost-effective, flexible way to expand mobility options in the project area that also maximizes the use of existing transportation resources. Voucher programs typically have municipal or agency sponsors, who determine eligible individuals and trip types and the level of subsidy they wish to provide to voucher users. For example, vouchers could be used to provide trips to clients' homes for home care workers, or for general transportation needs that cannot be accommodated by other services. Vouchers are either distributed free of charge or sold at a reduced rate to eligible individuals, who use the vouchers to purchase rides from public or private providers, such as transit providers, taxi or ambulette companies, volunteer drivers, and family members or friends.

Allowing reimbursement of volunteer drivers, even if they are family or friends of the rider, provides the maximum amount of flexibility and cost-effectiveness, and offers the greatest number of choices to riders. The inclusion of volunteers in a voucher program can help to make up for gaps in the service areas or hours of other transportation providers.

The Mobility Manager could administer the voucher program. Functions would include the identification of municipal or agency sponsors and participating providers, publicizing the program, printing vouchers, processing payments to providers for trips purchased with vouchers, and data collection and reporting. Start-up and administrative costs for voucher programs are typically low.

While funding is needed for the cost of the trips, vouchers are eligible expenses under the federal JARC and New Freedom programs. Sponsors using vouchers to provide trips for low-income workers, reverse commuters, or persons with disabilities (and meeting other JARC and New Freedom program requirements) would need to fund only 50 percent of the cost of the trips.

New Town/Train Station Shuttles

Two of the service gaps noted during stakeholder meetings were lack of inter-town travel options and access to rail stations for commuters. If municipal demand responsive services are coordinated in a larger program, that service could be used to address those gaps. The use of vehicles during commuting hours would complement the provision of medical, shopping, and community center trips during later morning, mid-day and afternoon hours. Service could be provided by means of regularly scheduled shuttles to and from designated spots or individual curb-to-curb (or door-to-door) trips arranged in advance.

This service could also be used to provide regular shuttle service to popular destinations, such as town centers or Mount Kisco.

4.0 Prioritized Mobility Management Activities

To obtain feedback on the proposed vision of Mobility Management for northeast Westchester County and to narrow down some of the optional elements, the concept was presented to the project Advisory Council at a meeting on May 6, 2010. Following a description of each of the Mobility Management components, the Advisory Council broke into small groups, each of which was charged with answering a number of questions about the component. Groups were assigned to discuss:

- Call Center
- Coordinated Home Care Worker Transportation
- Coordinated Volunteer Ride Programs

- New Transportation Voucher Program

(Consolidated municipal demand responsive services was not discussed by a small group, but is one of the Mobility Management components still under consideration.)

Questions addressed by each group and their comments are attached in Appendix B.

After each breakout group reported their comments about the Mobility Management component they discussed, the whole group ranked the components by voting with stickers. Each person had three stickers to apply to whatever Mobility Management component(s) they felt were most important to improving mobility in the project area.

The results of the ranking were:

- Call Center: 31 votes
- New Transportation Voucher Program 14 votes
- Coordinated Home Care Worker Transportation 10 votes
- Consolidated Municipal Demand Responsive Services 10 votes
- Coordinated Volunteer Ride Programs 3 votes

5.0 Next Steps

In April 2010, ALOFT conducted meetings with small groups of stakeholders to discuss their current transportation services and their needs and preferences regarding potential mobility improvements (spearheaded by a Mobility Manager) in northeast Westchester County. Small groups included:

- Public/municipal transportation providers
- Private transportation providers
- Home care agencies and other employers
- Volunteer ride programs

In advance of the meetings, questionnaires were sent to members of each group to collect information about current services and interest in alternative mobility solutions and guide the group discussions. A summary of responses to the questionnaires can be found in Appendix C, together with meeting notes prepared by ALOFT.

The next step in the design of the programs and services to be overseen by the Mobility Manager in northeast Westchester is to convene groups of entities that will be involved in a call center, coordinated home care worker transportation, consolidated municipal transportation services, coordinated volunteer ride programs, and a new transportation voucher program. Those entities will most likely be the participants in ALOFT's small group meetings and the project Advisory Council meetings (particularly the May 6, 2010 meeting). Suggested lists of participants in each meeting are provided below.

Call Center

Private providers, such as:

- CLC Transportation
- Chappaqua Transportation

- Katonah Taxi & Livery
- Ernie's Taxi
- KES Taxi
- Yorkie's Taxi & Limo

Others, such as:

- Westchester Library System
- WCDSPS
- AARP
- ALOFT representatives

Municipal transportation programs:

- Town of Bedford
- Somers Adult Transportation
- Town of North Salem
- Town of Pound Ridge
- Mt. Kisco Senior Nutrition Program
- Town of Lewisboro
- North Castle Seniors

Home Care Worker Transportation

Home care agencies and other employers, such as:

- Family Services of Westchester
- Visiting Nurse Services in Westchester
- Visiting Nurse Association of Hudson Valley
- Elder Care Connections
- Crickett Care
- Somers Manor Nursing Home and Rehabilitation Center
- Waterview Hills Nursing Center of Salem Hills
- Northern Westchester Hospital
- Dominican Sisters Family Health Services

Others:

- WCDSPS
- AARP

Consolidated Municipal Demand Response Services

Municipal transportation programs

- Town of Bedford
- Somers Adult Transportation
- Town of North Salem
- Town of Pound Ridge
- Mt. Kisco Senior Nutrition Program
- Town of Lewisboro
- North Castle Seniors

Others:

ALOFT representatives

Coordinated Volunteer Ride Programs

Volunteer groups or ride programs, such as:

- The Volunteer Center
- At Home in Somers
- RSVP
- AARP
- FISH Mt. Kisco/Bedford
- FISH North Salem
- FISH Heritage Hills
- Neighbor to Neighbor Pound Ridge
- Elder Care Connections
- Fishes and Loaves (St. Mary's)
- St. Patrick's Senior Neighbors Program (Bedford Village)
- Neighbors Homecare Service of Grace Community Church Center
- Other churches and synagogues
- ALOFT representatives

Voucher Program

Interested human service agencies, senior or disability advocacy groups, or municipalities, such as:

- Westchester County Office for the Disabled
- AARP

- WCDSPS
- Other organizations that provide programs and services for older adults and/or persons with disabilities
- Municipalities
- ALOFT representatives

The meetings with these groups will be led by a facilitator to ensure that the following items are addressed:

- All questions included in the small group discussion guides from the May 6 Advisory Council meeting
- Information requested in small group meeting questionnaires
- Next steps pertaining to each Mobility Management component that were identified by the breakout groups in the May 6 Advisory Council meeting
- Elaboration on comments of the May 6 breakout groups that discussed each Mobility Management component—for example, home care agencies commented that the pooling of funds for employee transportation services among agencies would be more feasible than the purchase of empty seats on each other's vehicles

Specific items to be covered in each meeting include the following:

5.1 Call Center

- What providers will supply the Mobility Manager with information about their services, so that it can be distributed through the call center?
- What is the best way to collect transportation provider information? How often should information be updated, and how?
- If access to transportation information on the Internet is important, should that capability be as soon as the call center is operational, or phased in later?
- Should the Mobility Manager take the lead in developing a printed or online directory of services, or is another entity interested in taking the lead?
- Further discussion of the role of the Mobility Manager in actual trip reservations and scheduling is needed
- Brainstorm ideas for publicizing and promoting the services of the call center

5.2 Coordinated Home Care Worker Transportation

- Which agencies are interested?
- How do those agencies currently provide, arrange for, or subsidize, services for employees (for those who have not completed the questionnaire sent prior to the ALOFT meetings)?
- What is the level of interest in various coordination options (for those who have not completed that portion of the questionnaire)?
- Current annual budgets for employee transportation services
- Number of employees transported annually

- Employee work hours
- Employee origins and destinations
- Are employee work schedules and origins and destinations stable or dynamic? Will frequent development of routes and schedules, or arrangements for individual rides, be necessary?
- What is a realistic timetable for developing and implementing coordinated transportation options for employees?
- What are the next steps?

5.3 Consolidated Municipal Demand Responsive Services

- Which towns are interested?
- Which coordination options are most feasible or desirable (for those who have not completed the questionnaire)?
    - Consolidated program operating in all seven towns?
    - Specific shared services between towns, such as an out-of-town medical service?
    - Coordinating activities such as driver training or vehicle procurement?
    - Acquiring reservations and scheduling software?
    - Centralizing trip reservations, scheduling and dispatching for all municipal programs?
    - Coordinating with neighboring towns to facilitate transfers for customers?
- Current annual transportation program budgets
- Current transportation staffs
- Current annual ridership
- Information about vehicles currently used –number, size, condition, accessibility
- What is a realistic timetable for developing and implementing coordinated municipal transportation services?
- What are the next steps?

5.4 Coordinated Volunteer Ride Programs

- Which programs are interested?
- How do programs currently operate (for those who have not completed the questionnaire)?
- What is a realistic timetable for centralizing volunteer ride program functions such as driver recruitment, driver training, public information, etc. through a Mobility Manager?
- What are the next steps?

5.5 New Transportation Voucher Program

- A new transportation voucher program is not scheduled to be designed until year 3 of the Mobility Management grant requested from NYMTC by ALOFT. Assuming that the grant application is approved, should this activity occur sooner than year 3?
- If so, what are some specific agencies or organizations that might be interested in sponsoring a voucher program by providing funds to subsidize the cost of vouchers for eligible individuals and/or types of trips?
- Could existing voucher programs (such as the one managed by Visiting Nurse Services of Westchester) be expanded to include other agency or organization sponsors?
- What is a realistic timetable for the development of a voucher program?
- What are the next steps?

Information generated at these facilitated meetings will be documented in Technical Memo #4, which will describe each Mobility Management component.

Appendix A: Steering Committee and Advisory Council Meeting Summaries

Design of a Demand Responsive Transportation System for Westchester County

Project Steering Committee Kick-Off Meeting

Westchester County Department of Transportation
100 East First Street, 9th Floor, Mount Vernon, NY 10550

December 18, 2009 - 10 AM to 12 PM

Meeting Attendees

Lawrence Salley	Commissioner, Westchester County Department of Transportation (WCDOT)
Mae Carpenter	Commissioner, Westchester County Department of Senior Programs and Services (WCDSPS)
Harry Stanton	Deputy Commissioner, WCDOT
Virginia Johnson	WCDOT, Project Co-Manager
Caryl Weinstein	WCDSPS, Project Co-Manager
Patricia Chemka	WCDOT
Catherine Wynkoop	Active Living Over Fifty, Inc. (ALOFT)
Richard Streicher	Westchester County Transportation Board
Evan Latainer	Westchester County Office for the Disabled (WCOFD)
Chris D. Andritsopoulos	WCOFD
Stephen Riordan	Family Services of Westchester

Consultant Project Team

Patti Monahan	TranSystems
Scott Giering	Howard/Stein-Hudson
Chelsea Gleis	Howard/Stein-Hudson

Meeting Summary

Commissioner Salley began the meeting by discussing the disconnect between older adults living in North East Westchester County and their transportation needs, and noted that people rank the issue of mobility as a concern above Medicare and Social Security. Because mass transit is not the most effective way to meet mobility needs in the seven suburban and rural communities in the study area, a demand-response transportation system is needed to further the goals of the Livable Communities initiative.

Commissioner Carpenter noted that Westchester County has some of the highest longevity in the region but also high rates of out migration. The Commissioner explained that most seniors wish to stay in their homes, but in order for that to happen, they must be able to travel for their needs, and caregivers need to be able to reach them. Furthermore, the County is concerned about those who choose to stay in their homes becoming isolated and disconnected from the community. This can lead to depression and therefore higher healthcare costs which could otherwise be avoided. This is a universal problem as "aging is everybody's business." Commissioner Carpenter described the Livable Communities Connection (LCC) initiative that WCDSPS launched in 2007 with the goal of making it easier for county residents to remaining in their communities and homes as they grow older. In order for people to "age in place" in the study area of northeastern Westchester County, people must have affordable housing, recreation, lifelong learning, health and wellness, safety, and the mobility toaccess those resources.

Patti Monahan and Scott Giering, project managers from the consultant team of TranSystems and Howard/Stein-Hudson, respectively, then gave an overview of the project team as well as the project goals, scope and schedule. A copy of the presentation is attached to this summary.

A number of items were then discussed by the group. Comments on each topic are summarized below.

Advisory Council membership

A suggested advisory council invitation list was presented; it included:

- Representatives from Municipal Transportation Programs
- County Legislators in the study area
- Livable Communities Connection (LCC) Councils
- Private Taxi and Bus Operators
- Organizations Serving Older Adults
- Faith-Based Organizations
- Volunteer Rides

The following comments were made on the list:

- AARP - David Olender and Will Stoner should be included
- Include representation from Westchester County Department of Planning
- Director of the Retired Senior Volunteer Program (RSVP) was suggested

- There is no trade organization for private taxi and bus operators and this presents a challenge
- Remove "Supportive of the Project" from County Legislators listings
- Consider adding Chambers of Commerce and grocery stores

Current transportation services

A prepared overview of existing transportation services, summarizing information obtained from the "Coordinated Public Transit – Human Services Transportation Plan for the Lower Hudson Valley", a survey recently conducted by ALOFT, and Internet searches, was circulated. Transportation programs and services included:

- Bee-Line bus service
- Bee-Line ADA Paratransit service
- Municipal transportation programs
- Human service agency transportation
- Private providers
- Volunteer ride programs

Comments included the following:

- There will be no Bee-Line service on Route 12 north of Armonk beginning in February 2010.
- Bee-Line ADA Paratransit provides about 212,000 trips per year; Bee-Line has tried to enlist other operators in the provision of service, but found they wanted a guaranteed level of work.
- American Red Cross used to provide transportation service, but discontinued its program because it was too costly.
- CLC Transportation in Mt. Kisco discontinued passenger service because of a burdensome taxi/limousine regulation.
- Add American Cancer Society's Road to Recovery program to the list of services.
- Some taxi companies on the list provided are no longer in business.
- Aging in Place programs in other areas, such as New Canaan, CT, include a transportation component.
- Only two churches –St. Patrick's in Bedford and St. Mary's in Katonah—substantially provide transportation service; two other faith-based organizations indicated a willingness to work with ALOFT on transportation issues.

Service gaps and challenges

The following comments were offered during the meeting:

- ALOFT is working with community organizations to identify the extent of the barriers to providing transportation and opportunities for potential collaboration. The organization is trying to give new life to volunteerism but faces key challenges:
    - Liability issues for drivers
    - Laws and regulations that prohibit the use of passenger vehicles to transport people (Taxi and Limousine Commission regulations)
    - Misinformation
    - Getting organizations to work together
    - A lot of these barriers can be addressed through better public education.
- Caregivers cannot get to people in the community easily.
- Taxis are not accessible for individuals who use wheelchairs.
- Insuring paid or volunteer drivers is a problem.
- Medically-related transportation services can be denied if someone does not have a prescription for treatment.
- There is no central database of all of the available transportation resources in order to better coordinate meeting the community's needs.

  Sometimes people may need to go places that are just outside the service area of a provider (such as FISH, for example). Can transportation be somewhat flexible in the geographic coverage area? White Plains, Yorktown, and hospitals in CT (Stamford, Danbury, and Greenwich) are some important destinations.
- Not enough organizations provided ridership data in response to the survey conducted by ALOFT. There will need to be follow up to get additional data.

Potential solutions

The following suggestions and comments were offered:

- Using volunteers or paid drivers, using Zipcars, which are already owned, maintained, and insured
- Can paratransit costs be reduced by a greater use of volunteer drivers? Can the county participate in insuring volunteers?
- Transit-Oriented Development (TOD) around train stations would help to reduce the need for transportation services;butNYC watershed constraints pose a problem.
- Private taxi and limousine services – but they want a guarantee of work.
    - Might be potential for some sort of time-share cooperative agreement
    - The black car business is hurting in this economy and now may be an opportune time to reach out to them.
- Should have a required minimum of accessible taxis in a fleet. An alternative might be to

provide incentives to taxi companies to obtain accessible vehicles by providing grant funds (such as federal New Freedom program funds) to subsidize the cost of the vehicles. However, federal grants come with strings that providers often feel are too burdensome.

- Improve communication within the community to increase the use of carpools
- AARP is conducting a series of focus groups and surveys in Westchester County. There is a possibility to work closely with them to determine questions to ask that may be helpful to this project
- Need to look into the possibility of the NYS Dormitory Authority's ability to purchase vehicles and then lease them to communities
    - Purchasing vehicles is one of the biggest challenges for organizations
    - If they had vehicles available it would be possible to match drivers with the fleets

Issues to consider

- The Federal transportation program reauthorization bill is moving along and "Livable Communities" will likely be an important focus. There may be opportunities/grants available for implementation of the service designed by this project.
    - Any information that could be used for grant applications should be gathered and readily available to submit.
    - Some concern about the 20% required local match for federal grants
    - Federal grants must go through the State, which can delay the availability of funding.
- Whether money for transportation is included in money for housing-related projects (consider this as a potential funding source when the Financial Plan for the demand responsive system is developed)
- Citizen engagement will be critical to the success of livable communities to determine what is needed to make a community livable.

Prepared by Howard/Stein-Hudson, 12/21/09

Design of a Demand Responsive Transportation System for Northeast Westchester

Project Steering Committee and Advisory Council Kick-Off Meeting

Court Room - Bedford Town House
321 Bedford Road, Bedford Hills, NY

January 12, 2010 – 2:00 PM to 4:00 PM

Meeting Attendees

Lee Roberts	Supervisor, Town of Bedford
Barry Singer	Active Living Over Fifty (ALOFT)
Bea Rieser	ALOFT
Virginia Johnson	Westchester County Department of Transportation (WCDOT)
Caryl Weinstein	Westchester County Department of Senior Programs and Services (WCDSPS)
Laura Tivoli	ALOFT, St. Mary's
Paula Desperito	ALOFT
Jeffrey Biever	CLC Transportation Inc.
Catherine Wynkoop	ALOFT
Anne-Marie Sirois	ALOFT
Robin Osborne	Westchester Library System
Susan Norwell	Dominican Sisters Family Health Service
Marco Idrovo	Ernie's Taxi
Charles Pieragostini	Village of Mt. Kisco
Brian Connolly	Westchester County Department of Planning
Joan Corwin	Chappaqua Transportation
Irene Sandford	ALOFT
Karen Gordon	The Preservation Company
Evan Latainer	Westchester County Office for the Disabled
John Schurdak	St. Patrick's Parish
Mike Kaplowitz	Westchester County Board of Legislators
Andrew Collins	Preservation Company
Steve Riordan	Family Services of Westchester (FSW)
Rae Szymanski	Visiting Nurse Association (VNA) of Hudson Valley
Richard Streicher	Westchester County Transportation Board
Wendy Wild	Representing Peter Harckham, Westchester County Board of Legislators
Diane Fulves	ALOFT
Sadie Candela	ALOFT
Liz Bailey	ALOFT
Gary Warshauer	Supervisor, Town of Pound Ridge
Joni Ehrlich	My Second Home, FSW
Miguel Duarte	KES Taxi

Barbara Taberer	Town of Somers
Linda Yurus	Town of Lewisboro
Pam Veith	Director of Lewisboro Seniors & Bedford Senior Program Coordinator
Dozene Guishard	WCDSPS
Mae Carpenter	Commissioner, WCDSPS
Alisa H. Kesten	The Volunteer Center of United Way

Consultant Project Team

Patti Monahan	TranSystems
Scott Giering	Howard/Stein-Hudson
Chelsea Gleis	Howard/Stein-Hudson

Meeting Summary

Welcome & Introductions

Lee Roberts, Supervisor of the Town of Bedford, opened the meeting by welcoming everyone and thanking them for attending.

Overview of Project Team

Patti Monahan, of TranSystems, introduced the project coordinators Virginia Johnson and Caryl Weinstein as well as the consultant team. She also explained that the study area is comprised of seven towns in Northeast Westchester County – Bedford, Lewisboro, Mount Kisco, North Castle, North Salem, Pound Ridge, and Somers—that are largely suburban or rural. As in most suburban and rural areas, low population density and dispersed locations of trip origins and destinations limit the effectiveness of traditional fixed route public transportation services and create mobility challenges for older adults, persons with disabilities, individuals with low income, others who do not or choose not to drive, and home health care workers with suburban/rural-based clientele. The purpose of this project is to identify opportunities for better coordination of existing transportation resources and the development of new services to bridge transportation service gaps for non-drivers.

Icebreaker

Scott Giering, of Howard/Stein-Hudson Associates, led the participants through an introductory activity to begin a discussion about issues the study would be addressing. Participants were given index cards and asked to write and rank the two or three biggest transportation challenges for clients/customers in the study area and for transportation providers/agencies that serve the target populations. Participants were also asked to identify two or three possible solutions or needed improvements.

Attendees then introduced themselves and stated their top transportation challenges and possible solutions, which are summarized below:

Consumer challenges

- Lack of transportation options
    - There is no formal on-call/on-demand transportation system for residents
    - General lack of mobility
    - Limited public transportation in the area
        - Not enough service
        - Commuters have a hard time getting to train stations
        - Limited pick-up and delivery locations for public transportation
        - Mass transit requires "mass" that the area does not have
        - No East-West transit service
        - Limited schedules
    - Car-oriented mentality
        - People do not want to take buses, trains, paratransit, etc.
- Communication
    - Many people do not know what services are available
- Reaching critical destinations
    - Working parents have problems getting their kids to school
    - Getting patients to medical appointments
- Isolation of residents (particularly the elderly)

Provider challenges

- Development patterns
    - Development in the area is spread out, which makes it difficult to provide efficient service
- Servicing clients
    - Difficult for home care workers to reach clients' homes
    - Lack of affordable transportation for the workforce
    - No-shows and cancellations by clients cost providers time and money
    - Clients not covered by insurance
    - Accessing individuals one-on-one is too costly
- Volunteers
    - No financial or other incentives for volunteers
    - No insurance for volunteers, which leaves them vulnerable to being sued
    - Not enough volunteers
- Vehicles
    - Wear and tear on larger vehicles
    - Vehicles are expensive
- Taxi services
    - Competition instead of collaboration
    - Taxi service is unreliable in the evening
    - Taxis do not run late enough from the train stations
- Agency coordination
    - Difficult because each has different driver and other requirements

- Limited budgets
- Outreach
    - No publicity for private, non-profit services (churches, organizations, etc.)

Solutions

- Call center needed
    - Allow people to call a day in advance to schedule rides
    - Transportation brokers providing centralized dispatch services
    - Hold clients responsible for frequent no-shows
- Utilizing existing transportation
    - School buses
    - Small vans and buses from businesses
    - Pool unused private cars and sell their service
    - Carpooling, electric vehicles
    - Improve bicycle paths
- New services
    - Shuttle/jitney services
        - Between train and bus stops – improved connectivity
        - Offer shuttle service connecting towns at central pick-up points
    - A system of vehicles managed by a voucher system to fill gaps
    - Establish a timeshare transportation cooperative
    - A cab company run by retired individuals who would like to work part-time
- Funding and financial issues
    - Have seniors sell their vehicles
        - Exchange for transportation credits
    - Secure possible federal/state funding
    - Offer transportation providers tax credits
    - Provide assistance for low-income workers to purchase vehicles
    - Reimbursement of mileage for volunteers
    - Cover rideshares and/or nonprofit volunteers under the County's insurance
- Outreach
    - Recruit more volunteer drivers
    - Publicize the programs more
- Reduce trips and trip distances
    - Recruit local staff
    - Add housing options near transit stops and amenities in established villages and town centers
    - Help people become more familiar with computers in order to promote online shopping and reduce vehicle trips
- Agency Coordination
    - Develop a mechanism for car sharing among agencies and departments
    - Shared resources among municipalities
    - Shared service plan for all municipalities

Presentation
Patti Monahan presented the project work plan and schedule followed by the preliminary data analysis, which included demographics, existing transportation services, service gaps, and unmet needs. A copy of the presentation slides (and handouts distributed at the meeting) is attached to this summary.

Comments

- Getting home health care workers to both training and client homes is a challenge.
    - Many come from the Bronx, where they meet at a central location and are then brought up in buses
    - There is a pool of potential labor in the Peekskill area, but lack of East-West transit service makes it difficult for these people to travel to client locations in NE Westchester
        - Patti Monahan noted that the Federal Transit Administration's Job Access and Reverse Commute (JARC) program is tailored for this type of transportation.
    - School buses could be hired to bring up workers en masse.
        - Westchester Family Services runs vans daily for 14-16 workers to North Central Westchester.

Discussion

Scott Giering led the participants in an additional discussion about transportation challenges and potential solutions for NE Westchester.

- The New Castle "trail to the rail" did not work because peoples' schedules were too varied and not concentrated into peak times.
- A bus ran to Manhattan in the 70s during the oil crisis, but that was the only time it worked.
- Some companies have their own vans and drivers to shuttle employees.

Origin-Destination Issues

- Hospitals are major destinations
    - White Plains
    - Mt. Kisco
- Heritage Hills is both a major origin and destination
    - Need to coordinate with their system
    - Difficult to get workers to the site
- Major origins for home healthcare workers
    - Bronx
    - Queens
    - Ridgefield
    - Staten Island

    - Stamford
    - Danbury
    - Lower Westchester (White Plains, below Route 287, Mount Vernon)
    - Peekskill
- Yorktown – Somers
- Irregular shift/travel patterns
    - Home healthcare jobs are often a few hours in multiple locations
    - Nursing homes provide buses, but generally for a single a location and for 8-12 hour shifts

Solutions

Besides having a call center and coordination of existing services, what are some other viable solutions?

- Existing resources
    - School buses
        - Use school buses to transport adults during non-school hours
        - Tap into transportation for kids and pre-school programs and use it for senior transportation as well
            - Hard to combine services for kids and adults
    - Public private partnerships with taxi and limousine services
        - They already have liability insurance and extra time in the day
    - Private bus/shuttle services
        - Nail salons in the area bus workers in from Queens. The drivers sit idle from 10am-7pm.
    - Car-sharing
        - Pool the resources of many municipalities
- Tax incentives
    - Legislation to allow tax-deductible contributions towards senior transportation
- Vouchers and incentives
    - In addition to buying rides from a transportation provider, vouchers can also be set up to reimburse friends or family members to give additional incentive.
    - Taxi companies would be willing to accept vouchers.
        - Would the voucher be valid only inside the community or outside as well?
    - Senior discounts for taxi fares
        - Taxi companies could give discounts during off-peak hours.
        - Seniors can be very loyal taxi customers
- "Wheels to Work" program
    - The problem with existing programs is that only people with children qualify, and a lot of home healthcare workers don't have children.
    - Perhaps the solution isn't creating a new program but modifying an existing one
- Education and outreach
    - Seniors are not comfortable with computers.
    - Need multiple media outlets
        - Cable, local television, radio

- Should be used to reach a broad audience of both customers and volunteers

Wrap-up and Next Steps
Patti Monahan closed the meeting by noting that the consultant team would use the input from the Advisory Committee to develop possible solutions in the coming months. The team will bring these suggestions back to the Advisory Council in April in order to get feedback.

Advisory Council Suggestions
Attendees were asked to write down any suggestions for additions to the Advisory Council:

1. MTC Limousine Bedford Hills, other limo services in the area
2. Owners of destination locations – retail centers, supermarkets, business associations
3. MTA
4. Rental car companies
5. Town Recreation Department
6. Neighbor-to-Neighbor Volunteer Group
7. Atipic Service
8. Private Bus Companies
9. Representation of low-income population
10. Community Center of Northern Westchester, Katonah
11. Westchester Disabilities Advocacy Partnership (WDAP)
12. Carola Bracco, Executive Director of Neighbors Link in Mt. Kisco

Prepared by Howard/Stein-Hudson, 1/21/10

Appendix B: Small Group Discussion Questions and Comments

Small Groups to Discuss Specific Mobility Manager Components: Questions

1. Call Center

Questions to discuss:

- What do you see as the overall benefits of a Call Center? What are some of its drawbacks?
- Would a printed or online directory of transportation services, in addition to information provided over the phone by Mobility Manager staff, be useful to individuals and agency staff members? If so, what type of information needs to be included in the directory?
- Is it enough for the Mobility Manager staff to identify the appropriate transportation provider for their customers' trips and give them the provider's phone number, or should the Mobility Manager staff be able to make reservations for the customer, either by:
  - Calling the provider on behalf of the customer or
  - Making a reservation directly in a centralized reservations/scheduling software system?
- Are there other services the Mobility Manager should provide?
- Should those levels of assistance be phased in over time?
- Is access to transportation information on the Internet important?
- Would providers be willing to supply information about their services to the Mobility Manager periodically? How often?
- Would providers be willing to accept trip referrals from the Mobility Manager?
- What problems or challenges do you see to implementing a Call Center?

2. Home Care Worker Transportation

Questions to discuss:

- What do you see as the benefits of coordinating home care worker transportation? Are there any drawbacks?
- What is the potential for the following different types of coordination among agencies:
  - Sharing empty seats on agency's vehicles with employees of other agencies
  - Centralizing trip reservations and dispatching among agencies that operate (or contract for the operation of) employee transportation services
  - Jointly contracting with other agencies for one operator of employee transportation services
  - Coordinating activities such as vehicle procurement, driver training, or vehicle maintenance
- What specific gaps in service still prevent employees from reaching clients' homes, even with the transportation services operated or contracted for by the agencies?

- Would volunteer rides to or from train stations or other pick-up points, arranged by a Mobility Manager, be helpful? Would a voucher program that the agency could use to subsidize employees' trips on taxis or other private services be helpful?
- What do you see as the most significant barriers or challenges to coordinating home care worker transportation?

3. Consolidated Municipal Demand Response Services

Questions to discuss:

- What do you see as the benefits of coordinating municipal demand response transportation program? What are the potential negative impacts?
- What is the potential for the following types collaboration among towns on an inter-town transportation program?
    - Consolidated demand-response transportation service for eligible individuals that operates in all northeast Westchester towns
    - Specific joint efforts between towns, such as shared out-of area service or regular routes between communities
    - Coordinating activities such as vehicle procurement, driver training, or vehicle maintenance
    - Acquiring paratransit reservations/scheduling/dispatching software to automate, or assist with, those functions
    - Centralizing trip reservations, scheduling and dispatching for all municipal transportation programs
    - Coordinating with neighboring towns so that customers could transfer from one service to another
- What are the most significant barriers or challenges to coordinating municipal demand response programs?

4. Coordinated Volunteer Ride Programs

Questions to discuss:

- What do you see as the primary pros and cons of coordinating volunteer ride programs?
- Would the centralization of functions for all interested volunteer programs by a Mobility Manager be beneficial? Functions that could be centralized include:
    - Driver recruitment
    - Driver training and recognition
    - Provision of information about volunteer ride programs available to residents of northeast Westchester
    - Pursuit of grant funds and/or development of a voucher program (with agency and/or municipal sponsors) to support the reimbursement of volunteer drivers
    - Matching of customers with trip needs and volunteer drivers

- Which functions should be centralized?
- What are the specific concerns related to insurance and liability that affect volunteer ride programs?
- Would research into and possible resolution of insurance and liability issues for volunteer drivers be helpful?
- Are there other potential barriers or challenges you see to coordinating volunteer ride programs?

5. Voucher Program

Questions to discuss:

- What do you see as the benefits of a voucher program? Are there drawbacks?
- Would a voucher program help to bridge service gaps for older adults and persons with disabilities?
    - Vouchers could be used to pay part or all of the cost of rides provided by taxi companies, ambulettes, and other private providers; volunteer drivers; family and friends
- Would a voucher program assist home care workers with transportation to clients' homes in northeast Westchester?
- How would eligibility for vouchers be determined and verified?
- Typical voucher program sponsors include municipal senior citizen or human services departments, centers for independent living, state councils on developmental disabilities or vocational rehabilitation agencies, United Way, ARC, Community Action Programs, and others. Voucher programs are also an eligible expense under the federal Job Access and Reverse Commute (JARC) and New Freedom programs. Is there potential for sponsorship of a voucher program in northeast Westchester? If so, by who?
- What do you see as the major barriers and challenges to implementing a voucher program?

Design of a Demand Responsive Transportation System for Northeast Westchester County

Advisory Council Meeting

South Salem Fire House
1190 Route 35, South Salem, NY 10590

May 6, 2010 – 2:00 PM to 4:00 PM

Meeting Attendees

Barry Singer	Active Living Over Fifty (ALOFT)
Bea Rieser	ALOFT
Caryl Weinstein	Westchester County Department of Senior Programs and Services (WCDSPS)
Virginia Johnson	Westchester County Department of Transportation (WCDOT)
Jeffrey Biever	CLC Transportation Inc.
Catherine Wynkoop	ALOFT
Robin Osborne	Westchester Library System
Marco Idrovo	Ernie's Taxi
Steve Riordan	Family Services of Westchester
Rae Szymanski	Visiting Nurse Association (VNA) of Hudson Valley
Charlotte Smith	Visiting Nurse Association (VNA) of Hudson Valley
Richard Streicher	WCTB
Miguel Duarte	KES Taxi
Linda Yurus	Town of Lewisboro
Pam Veith	Director of Lewisboro Seniors & Bedford Senior Program Coordinator
Diane Fulves	ALOFT
Betty Kemp	Lewisboro Seniors
Chris D. Andritsopoulos	WCOFD/ParaTransit Coordinator
Jean McGrath	Lewisboro Seniors
M. Yablonski	DSPS
Eloise Barron	RVNA Quality Living at Home
Charles Duffy	Supervisor, Town of Lewisboro
Alisa H. Kesten	The Volunteer Center of United Way
Roberta Velichko	Home Instead Senior Care
Roberto	Yorkie's Taxi & Limo
Wendy Wild	Westchester Legislator Peter Harckham

Consultant Team

Patti Monahan	TranSystems
Scott Giering	Howard/Stein-Hudson
Chelsea Gleis	Howard/Stein-Hudson

Meeting Summary

Welcome & Introductions

Patti Monahan, of TranSystems, opened the meeting by welcoming everyone and thanking them for coming.

Project Status Report & Potential Solutions to Mobility Challenges

Patti Monahan presented on the project background, issues discussed at the January 12 kick-off meeting, activities since that meeting, and the concept of Mobility Management and potential mobility solutions for northeast Westchester County. A copy of the presentation is attached.

A participant asked for an example of where mobility management is in place. Ms. Monahan provided three examples:

- In Kentucky and South Carolina, municipalities are using federal funding to acquire technology for a call center with centralized reservations and dispatching.
- Several counties in Illinois have set up a low-tech mobility manager which will eventually evolve into a call center.
- Wisconsin has mobility managers in every community; their roles vary from determining ADA eligibility to coordinating various entities in building up the transportation network.

Discussion

Scott Giering, of Howard/Stein-Hudson Associates, outlined the upcoming discussion activities, involving separating into groups to answer a series of questions on one of the potential solutions: a call center, coordinated home care worker transportation, coordinated volunteer ride programs, a voucher program, and consolidated municipal demand response services. Mr. Giering first asked if there were any questions about the potential solutions presented or the overall concept of a Mobility Manager.

Questions and comments

- A participant asked if the groups should work under the assumption that there is funding for separate call centers
    - The present solutions provide for a single centralized call center.
    - All of these potential solutions were included in a JARC/New Freedom $990,000 grant application submitted by ALOFT to NYMTC. If awarded the money would be disbursed over three years.
- A participant asked about coordination with 211 since people already call there for information
    - It is very important for a future call center to coordinate with 211, 311, & 511 (social, government, and transportation services, respectively).
- A participant asked about the funding for a voucher program
    - Voucher programs are typically sponsored by agencies or municipalities. Those entities decide eligibility requirements, what types of trips are eligible, and the level of trip subsidy. There is no immediate funding in the requested grant for vouchers, but voucher programs are eligible expenses under both the JARC and New Freedom grant programs.

- A participant asked whether the solutions would address crossing the state line because many people in NE Westchester travel to Norwalk, CT for medical services
    - This planning project covers only services in the study area.

Mr. Giering split the group into four small groups and distributed the list of questions for each proposed option (the list is attached). The groups discussed their specific questions for 30 minutes and then reported back to the entire group. A summary of each group's discussion and response is provided below.

Call Center

- Benefits
    - Centralized communication
    - Coordination of rides
    - Providing services to those in need
    - Improved accessibility of transportation
    - Cost savings
- Drawbacks
    - Liability
    - Increased need for communications
- Reservations
    - Some participants believed it is enough for the Mobility Manager staff to identify the appropriate transportation provider give them the provider's phone number.
    - Others felt the Mobility Manager should be able to make reservations, either by calling the provider on behalf of the customer or making a reservation directly in a centralized reservations/scheduling software system
- Directory of information
    - A printed or online directory of transportation services would be useful to individuals and agency staff members.
    - Days and hours of operation, types of services, destinations served, whether service is curb-to-curb or door-to-door, whether providers have accessible vehicles, and costs need to be included in the directory.
    - Providing information on the Internet is important.
- Providers
    - Providers would be willing to supply information about their services to the Mobility Manager periodically.
    - The frequency with which that information is updated should be mandated.
    - Providers would be willing to accept trip referrals from the Mobility Manager.
- Next steps
    - Identify sources of funding
    - Identify providers willing to participate

Home Care Worker Transportation

- Benefits
    - More home services available to patients

- Drawbacks
    - Pockets of service areas
    - Licensing coordination, especially across state lines
    - Different shifts
    - Shorter shifts are not worthy of subsidized fares
    - Medicaid vs. Medicare vs. state payer reimbursement for home care services
- Agency coordination
    - There is potential for sharing empty seats on agency's vehicles with employees of other agencies, but pooling funds is more feasible than agencies paying for seats on other agencies' vehicles.
    - There is potential for agencies to jointly contract with one operator of employee transportation services. However, there are not enough clients to fill vans with aids. A critical mass is needed to make it successful.
    - There is potential for coordinating activities such as vehicle procurement, driver training, and vehicle maintenance.
    - Coordination of their own employee transportation is a big job for agencies, and would be more so for a Mobility Manager.
    - A voucher program to help offset the cost of transportation to employees would be helpful; a consortium of employers might apply for JARC funding.
- Volunteer rides
    - Volunteer rides to or from train stations or other pick-up points, arranged by a Mobility Manager, would be helpful.
    - There are issues, including insurance, that need to be resolved.
    - Volunteers may not be reliable and cancel in times of inclement weather.
- Challenges
    - Building critical mass
    - Identifying clusters of care
    - Selecting central stops for vans

Coordinated Volunteer Ride Programs

- Benefits
    - Broadened scope
- Drawbacks
    - Need to minimize the barrier of riding with strangers
    - Drop in individualized socialization (traveling with same volunteer driver regularly)
- Functions
    - The centralization of functions by a Mobility Manager would be beneficial, including:
        - Driver recruitment
        - Driver training and recognition
        - Provision of information about volunteer ride programs available to residents

        - Pursuit of grant funds and/or development of a voucher program to support the reimbursement of volunteer drivers
        - Matching of customers with trip needs and volunteer drivers
    - Other functions that should be centralized include education, outreach, marketing, training, advocacy to expand reimbursements, and advocacy for driver privileges (such as priority parking).
- Users
    - The program should be marketed to people 55+, who might not be utilizing senior centers but need rides for trips after having undergone surgery and could later become volunteer drivers themselves.
- Concerns, challenges, and barriers
    - Insurance and liability for volunteer drivers:
        - Education is needed about roles, guidelines, and requirements for secondary insurance
    - What knowledge about a client is needed– i.e. medical condition
    - Communication during rides between drivers, the call center, and clients (drivers do not always have cell phones)
    - Outreach and communication
- Next steps
    - Develop a process for determining if a driver is an appropriate candidate for the program, including background checks.
    - Develop descriptive materials, for example, FAQs for potential drivers

Voucher Program

- Benefits
    - The provider discount is already known
    - Would help to bridge service gaps for older adults and persons with disabilities (vouchers could be used to pay part or all of the cost of rides provided by taxi companies, ambulettes, and other private providers; volunteer drivers; family and friends)
    - Would assist home care workers with transportation to clients' homes in northeast Westchester. An example of this already exists in Mount Kisco through Ernie's taxi, which sees 200-300 voucher trips per month.
- Drawbacks
    - Cannot go across state lines
    - Stigma attached to vouchers
- Eligibility
    - Should include seniors 60 & older
- There is potential sponsorship of a voucher program in northeast Westchester
- Challenges and barriers
    - Merchant participation
    - Assurance that funding for the program will continue
- Next Steps

    Identify who needs services

After the reports by the small groups, participants were asked to use the three dots (given out at the beginning of the meeting) to prioritize the options presented, by giving their dots for their preferred solutions. The totals were:

Call Center – 31
Home Care Worker Transportation – 10
Consolidated Municipal Demand Response – 10 (by show of hands)
Coordinated Volunteer Ride Programs – 3
Voucher Program – 14

Wrap-up and Next Steps

Patti Monahan closed the meeting by saying that the Consultant Team would sum up the comments from the session. The next step is to get together again with entities that would be involved with implementing some of the potential activities to discuss, in greater detail, policy and operational issues. After putting together a description of the various activities, the Consultant Team will come back to the Advisory Committee in September with draft marketing/implementation and financial plans for the options that will move forward.

Prepared by Howard/Stein-Hudson, 5/7/10

Appendix C: ALOFT Small Group Meeting Notes and Summary of Responses to Questionnaires

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Mobility Management
Municipal and Public Transportation
Hergenhan Center, 40 Maple Avenue, Armonk
April 22, 2010 at 9 AM

Present: Bruce Barnard (North Castle Recreation), Patty Tompkins (representing North Salem Seniors), Chris Andritsopolis (Paratransit), Linda Yurus (Lewisboro Senior Outreach), Pam Veith (Lewisboro Seniors and Bedford Seniors), Vicki Schott (Armonk resident and ALOFT Board member), Virginia Johnson (Westchester County Department of Transportation), Catherine Wynkoop (ALOFT).

Rural, unpaved roads, discourage workers and older volunteers from driving in remote areas across the region. The towns each provide some sort of transportation for older residents, mostly through the Recreation Departments.

- North Salem has a 14 passenger bus that it uses to transport older residents to recreational events, shopping, etc. and the Town Supervisor is open to collaborating with other towns to be sure the bus runs full.
- North Castle has a 14 passenger bus that runs to and from the Hergenhan Center 2 days of the week. Due to budget constraints, the town has cut shopping, recreation and trips to medical appointments. They had found that town residents who had family or who could afford to take private livery services had become dependent on the town bus.
- Pound Ridge has a 14 passenger van that takes older residents shopping and for recreation. It is setting criteria for use of volunteer and town support services for older residents and disabled.
- Lewisboro has a bus (paid driver 2 days a week) that transports older residents to and from the South Salem Fire House for the Senior program each Wednesday; provides shopping trips and lunch on Mondays; and provides shopping trips to the area malls on Fridays. In addition, Linda schedules and coordinates rides to medical appointments with families for older residents and disabled.
- Bedford's small van runs to and from the Bedford Hills community House 3 days a week and provides shopping rides from the Center. FISH volunteers provide rides to medical appointments.
- County Paratransit can enroll qualified members within 21 days of application. There are 3 types of membership: Conditional (for medical appointments), Unconditional, and Temporary (3 months – 1 year). Doctor's certification is required. They provide service

within ¾ mile of a regular bus route at all times, but do much more in core hours, which are 7 AM – 7:30 PM.

Issues affecting ability to move older residents and people with disabilities across the rural northeast region:

- What is the purpose: Mobility, safety, active engagement and quality of life, social connections, other?
- What are the qualifications: Lewisboro Seniors is open to age 50+; Meals on Wheels is open to 60+.
- Communications: How are volunteers mobilized or schedules arranged -- Pound Ridge has started to use Twitter and Facebook to find volunteers for specific projects. Who are these volunteers and what do we know about them?
- Without a full address book of friends, where else can volunteer drivers be found: North Castle has had success working with Temple Shaaray Tefila in Bedford.
- Liability issues
    - Volunteer drivers
        - Screening criteria – valid driver's license, DMV history, safety and condition of volunteer's own vehicle (regular inspections and safety inspections with local police & public safety)
        - Background checks and face to face interviews
        - Supplemental liability insurance
        - Volunteer preferences – non smoker riders; gender of rider; distance; times; purposes
        - Rider preferences – non smoker rides; gender of driver
    - Local taxi services – are they licensed?

Recommendations for regional communications and coordination:

- Use Constant Contact (or other opt-in email database system)
- Use Twitter and Facebook to coordinate with families and younger volunteers and teach older residents how to use.
- Can we improve ride access and reduce costs of mobilizing and scheduling rides by coordinating regionally? That is one of the goals of ALOFT's Mobility Management project.

Respectfully submitted,

Catherine Wynkoop
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Mobility Management
Private Taxi and Livery Services
Katonah Village Library (upstairs conference room)
April 23, 2010 at 3 PM

Present: Jeff Biever (CLC Transportation), Miguel Duarte (KES Taxi), Roberto Alarcon (Yorkies Taxi), Marco (Fabian) Idrovo (Ernie's Taxi), Virginia Johnson (Westchester County Department of Transportation), Catherine Wynkoop (ALOFT).

What are the challenges to providing service to older residents and people with disabilities in northeast Westchester? What regulatory provisions help and hinder such service?

CLC Transportation began in 1992. It provides service to people with permanent or temporary disabilities in Westchester and Putnam Counties. They no longer provide taxi service. They cannot take non-disabled people. Riders must provide a physician certification of disability. Affinity, Hudson Health Plan and Fidelis are HMOs that provide authorization for Medicaid recipients. Department of Social Services Transportation office refers clients to CLC for service. Exemptions exist to transport aides and low income workers, but CLC would have to apply for the exemption to the NYS DOT.

In order for CLC to provide taxi service, they would have to get TLC (Taxi & Livery Commission) licensure for their drivers, which would cost $5-10,000 per year. They avoided this challenge by eliminating passenger vehicles. They avoid TLC regulation if their vehicles use bus plates and are 14+ passenger vans and ambulettes.

Primary barriers to CLC expanding service: (1) TLC restrictions; (2) NYS DOT requires exemption application to transport private pay or other than Medicaid passengers; and (3) busy AM and PM rush hours limit flexibility.

Taxi Service. County TLC licenses vehicles and drivers. Towns with train stations regulate taxi plates, but each town may license in different ways. For example, Mt Kisco limits the number of cab licenses to a total of 50, regulates the rates charged, licenses drivers and vehicles. Bedford inspects cars, but does not regulate rates or license drivers. In general, drivers are regulated by the County TLC (and town of Mt Kisco); cars are regulated by the towns.

Another challenge is the green card, which is required for TLC license. If someone already has a license, he/she can get a Mt Kisco license to drive, even without a green card.

Cost of a Mt Kisco license is $300 per car and $100 per driver. TLC licensure is $400 per year for each driver.

One participant thought that it would be helpful to standardize a bit more. For example, the County might license all drivers. As it is, licensure varies by towns. For example, in Mt Kisco a locally licensed cab may pick up a passenger at a taxi stand, but if not licensed, the cab cannot pick up there. It can only provide service if reserved in advance.

Background checks. The TLC is changing its requirements for background checks. Every year it will cost $105 per driver for digital finger printing. It would be helpful if, as through the driver certification unit, such licensure would include a service that notifies the company when a driver has an accident and will report accumulated points.

Kitty asked participants to bring hand out information about their service to the May 6 Stakeholders' meeting and to begin to think about how best to describe what they can do for older residents, people with disabilities and low income riders to be included in ALOFT's online transportation directory in the fall.

The second **Mobility Management Stakeholders'** meeting (the large group that encompasses all the small work groups plus elected officials and other volunteers) will meet on **May 6, 2-4 PM**, at the South Salem Fire House. We hope that representatives from each employer group will be able to attend.

The group will meet again after the Stakeholders' meeting on May 6.

Respectfully submitted,

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Mobility Management
Employers' Workgroup Meeting
April 21, 2010, 9 AM
Mt Kisco Child Care Center
98 Radio Circle, Mt Kisco, NY 10549

Present: Suzanne Moses (VNSW), Steve Riordan (FSW), Carol Ryan (MetroPool), Mary Ann O'Grady (Ridgefield VNA), Cornelia Schimmert (VNAHV), Grace Cognetta & Karen Marousek (Elder Care Connections), Joni Ehrlich (My Second Home), Virginia Johnson (WCDOT), Catherine Wynkoop (ALOFT).

The purpose of the meeting was to discuss current methods of transporting low income workers (mostly home health aides) to work in northeast Westchester and to begin to explore other methods and opportunities for collaboration.

Family Services of Westchester: Have been running vans from south Westchester to the north for 15 years. Initial funding came from IBM. Currently they operate 2 vans from Mt Vernon to a shared aide provider cluster, Beaver Ridge apartment complex for older residents and disabled in Yorktown. They bring 12-14 aides per day and can make stops at Jefferson Village and in between. Aides come to the office in Mt Vernon to catch an 8 AM van. Transit time from home to office and from office to patient homes is unpaid time. FSW tries to keep total commute time to an hour. They are considering use of a fleet provider to manage the van system. Shifts are 4,8, 12 hours for certified home health aides working for their licensed agency (LCSA). (Aides working for a Certified Home Health Agency (CHHA) work about 1.5 hours per visit.) Long Term Home Health Agency person care workers can be paid $14 per hour. But there is enough variation among patient insurance choices that the same aide might be paid from $11.50 an hour plus $1.50 health insurance (or $13 an hour without health insurance) to $14 an hour. "Living wage" regulations further complicate what aides are paid. Aides can largely pick and choose their assignments according to their own best interests.

Visiting Nurse Services in Westchester: 16 of their 26 aides drive their own vehicles. VNSW pays workers for mileage on their private vehicles, bus pass and train reimbursement. They also assist with cost of insurance (they require $100K/300K auto liability insurance). They contract with a fleet management company to bring workers up in a van. (Suzanne agreed to share the name of their fleet management vendor.)

Visiting Nurse Association of Hudson Valley: Two vans bring aides from Fordham Road in the Bronx (probably at the Metro North Station) to the greater Yorktown area. 12-15 passengers fill each van. Their fleet subcontractor manages schedules. VNAHV's hospice employs aides and LPNs that are able to drive into Putnam County.

Elder Care Connections: A licensed agency operating out of North Salem, ECC accepts private payment only. They hire workers locally and try a variety of creative strategies to encourage aides to accept assignments.

MetroPool: A nonprofit organization that contracts with the NYS Department of Transportation, MetroPool works to reduce commuter congestion by encouraging ride sharing, van pools, and related strategies. Their van pool models have traditionally been of 2 types: (1) commuter vans (90% of their vans) in which the workers drive the van and share costs of gas, tools, insurance; and (2) corporate vans in which the employers pay for the costs, even though the employees either share driving or the employer pays a driver. Each model requires 2 approved drivers per van. The DOT sets rates based on the number of miles on a route. In addition, MetroPool has been working with NuRide, an online ride share hookup site that requires a work email address for participants. Further information will be available to the workgroup at the next meeting.

Ridgefield Visiting Nurse Association/Quality Living at Home: The state of CT supports a variety of transportation options in the town of Ridgefield, including the Sweetheart bus that provides low cost options to disabled and older residents. When there is room, caregivers can accompany eligible riders. We especially appreciate the participation of the RVNA whose service area is adjacent to North Salem and look forward to learning more about CT models in the near future.

What is the best way to hear what workers prefer and would like to see in transporting them to work in northeast Westchester? Steve suggested that we speak with the Coordinators, as he does. Kitty asked that participants consider whether it might be possible to speak with their staff, perhaps on a van trip.

The second **Mobility Management Stakeholders'** meeting (the large group that encompasses all the small work groups plus elected officials and other volunteers) will meet on **May 6, 2-4 PM**, at the South Salem Fire House. We hope that representatives from each employer group will be able to attend.

Issues for further research:

- Payment to aides who commute 1+ hours from home to patient homes.
- Living Wage regulations that leave a range of payment options for the same workers providing the same care.
- Liability issues are preventing some volunteer support to move aides from van drop off sites to patient homes. Some aides drive client's vehicle.

- Current NYS regulations prevent subcontracting with neighboring Ridgefield VNA for aides. Aides would have to be certified in NYS as well as CT. The Danbury registry does provide aides for north east Westchester.
- Safe care sometimes means transporting patients out of their homes.
- Worker priorities and preferences for traveling to northeast Westchester to work.
- Possible connections with Meals on Wheels volunteers bringing meals from Yorktown to North Salem, Somers and Lewisboro.

The next employers' workgroup meeting will be called after the May 6 Stakeholders' meeting.

Meeting ended at 10:10 AM.

Respectfully submitted,

Catherine (Kitty) Wynkoop, ALOFT

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Mobility Management
Volunteer Organizations Workgroup Meeting
April 26, 2010, 9 AM
St. Patrick's Church Conference Room
Bedford Village

Present: Paula Desperito (ALOFT Board and Bedford Village resident), Kathleen Sullivan (Coordinator, FISH North Salem), Sadie Candela (Mt Kisco), Diane Fulves (Pound Ridge), John Schurdak (St. Patrick's Church Senior Neighbors Program), Virginia Johnson (WCDOT), Catherine Wynkoop (ALOFT).

The purpose of the meeting was to learn more about the volunteer programs serving northeast Westchester, their challenges, and opportunities for coordination.

Kitty distributed a brief description of mobility management. Virginia clarified that the County Department of Transportation is currently contributing technical support to design a mobility management initiative that likely will recommend a one-call center and ways to coordinate and enhance existing transportation services in northeast Westchester; the County will not be implementing or providing transportation services. Small groups have been formed as part of this design initiative: municipal workers involved with transportation (mostly recreation department staff), private livery, and employers of low income workers (mostly home health agencies) are also meeting to explore ways to coordinate among themselves and other types of transportation options.

Programs represented:
North Salem FISH – Kathleen said that there is not much activity. Issues that would make the volunteer program more attractive to prospective drivers include supplemental liability insurance and mileage reimbursement, both of which they are considering joining RSVP to provide their drivers. Background checks may be necessary in the near future. Kathleen is able to do informal needs assessments for more than just transportation when older residents request rides.

St Patrick's Senior Neighbors – This program provides a wide variety of services (transportation, telephone reassurance calls, home visits, shopping services, in-home chore service (shovel snow, sand ice, clean, prepare meals, respite, etc.), home maintenance assistance (electrical problems, appliance problems, plumbing problems, carpentry problems). The model came into

being once the parish realized that when the spouse of an older person dies, the survivor may not know what to do or whom to ask for service. They encourage people in need to make connections and build relationships. Volunteers say that helping is their reward.

They keep administration simple, but do use a volunteer preference interview form. They have found that it is important to follow up with both the volunteer and the recipient to learn how the interaction went. It is important to ensure that a backup coordinator is always available.

Pound Ridge – Diane has used the St Patrick's program and plans to become a volunteer driver there. She described a new program in Pound Ridge, called Share Your Meal, which is a loosely structured project geared to address short term meal needs.

Priorities to consider for mobility management – needs of individuals without friends or family available to accompany to outpatient surgery; costs of trips to White Plains and NYC, especially for medical appointments. Also important will be to understand downsizing opportunities accessible to transportation connections for older residents who want to downsize.

The second **Mobility Management Stakeholders'** meeting (the large group that encompasses all the small work groups plus elected officials and other volunteers) will meet on **May 6, 2-4 PM**, at the South Salem Fire House. We hope that representatives from each employer group will be able to attend.

The next employers' workgroup meeting will be called after the May 6 Stakeholders' meeting.

Respectfully submitted,

Catherine (Kitty) Wynkoop, ALOFT

Organization	Name	Email	Staff involved in transportation program (# FT, #PT)					Describe licensing requirements for drivers
			Mgr./Coord	Sched	Disp	Drivers	Other	
Town of Somers Adult Transportation	Barbara Taberer	btaberer@somersny.com	1 PT			2 FT, 4 PT, 30 vol.		NYS drivers license. No CDL b/c there is < 14 passengers
County of Westchester Bee-Line Paratransit	Chris Andritsopoulos	cda2@westchestergov.com	1	1	14	113 FT, 10 PT	Reservationists; Mechanics and washers	19A certified

How does your organization perform the following functions?			
Prepare vehicle schedules	Train drivers	Maintain and repair vehicles	Obtain replacement vehicles
Computer generated forms for each program are recorded manually leading up to the event, and then an overview is prepared along with trip details, and discussed with driver	When a new driver is hired, procedures regarding safety and Town policy are presented and questions answered with administrator. A period of approximately 2 weeks is spent training directly with an experienced staff driver. Physicals are required	The Somers Adult Transportation program schedules maintenance and repairs for it's vehicles. When possible Somers Highway and Parks and Rec staff perform some maintenance and repairs. When they are unavailable, local garages and dealerships are hired for service.	Check with Town Supervisor to see if other departments have vehicles available or are able to share time. Grant applications are submitted to government agencies for replacement vehicles; grant opportunities with private companies.
Trapeze software	Safety, passenger securement, sensitivity training, mandatory annual refresher training	Daily	Every 3 years

# of vehicles					Advance notice time	Trip Types Allowed						
sedans	minivans	7-15 pass. vans	minibuses/ small bus	other		No restriction	Work trips	Medical appts.	Shopping	Social/ rec.	Personal business	Other
		3 (2 accessible)		1 SUV	First come, first served, up until departure			X	X	X	X	Ride to visit spouse in nursing home; Nutrition Program 5 days/ week; physical therapy
		84			Up to 7 days in advance	X						

Fare for ride?	Are donations accepted/ requested?	Policy on Level of Assistance					Busiest days/ hours of service	Room for additional riders at those times?	Least busy days/hours of service	Room for additional riders at those times?
		Curb-to-curb, no assistance	Door-to-door, help to and from vehicle	Door-to-door, to and from vehicle and into the main entrance	Door-through-door, enter front door of residence or destination	Other				
	$5 for medical appt./ $1 for shopping			X		Driver will enter destination if necessary for safety of client	Midday, M-F		Variable	
$4		X					Monday-Friday, 7:30-9 am; 3:00-5:30	Not unless cancellations occur	Saturdays, Sundays	Yes

Top five rider destinations	Most frequent request for out of service area destination	No. of annual one-way trips	Est. Annual Budget for Transportation Program	Top three challenges faced
Somers Nutrition Program, Somers Senior Club, CT and upper Westchester supermarkets and malls, MKMG (all locations), Yorktown medical offices, Putnam Hospital, Northern Westchester Hospital, physical therapy (3 in Somers)	See previous answer	8,700	Full-time van drivers earn $15-16/hour. Part-time drivers earn $13/hour.	We cover 33 square miles in a rural area. Getting to the nearest bus stop is not an option for most of our participants. All service is door to door.
Peekskill, Yonkers, Greenburgh, Mt. Kisco, White Plains	None	NA	Close to $10 million	On-time performance, no-shows and cancellations, rising budgetary cost

Indicate level of interest in possible strategies							
Expanding days/hours of service	Serving additional customer groups	Expanding eligible trip types	Coordinating activites such as vehicle procument, driver training, or vehicle	Acquiring paratransit software	Centralizing trip reservations, scheduling, dispatching	Coordinating with neighboring towns, allowing customer transfers	Merging transportation programs into one service
P	P	P	N	N	P	V	V

Public Providers

Organization	Name	Email	Indicate Type of Service Currently Provided					
			Private pay passengers	Medicaid NEMT	ADA	Student	Contract for HSA	Other
Chappaqua Transportation Inc.	Joan Corwin	buscorwin@aol.com	X			X		Mother Hens Helpers, nannies, babies, senior citizens
CLC Transportation Inc.	Jeffrey Biever	clctrans@optonline.net	X	X		X	X	
Ernies Taxi	Marco Idrovo	Idrovo4@aol.com	X					
K.E.S. Taxi	Miguel Duarte	miguelkes@aol.com	X					

How does your organization perform the following functions?				Staff involved in transportation program (# FT, #PT)				
Prepare vehicle schedules	Train drivers	Maintain and repair vehicles	Obtain replacement vehicles	Mgr/Coord	Sched	Disp	Drivers	Other
Our own program and Transfinder for school district schedules	NYS Education Dept. course of training	At our facility- inspected by DOT	As necessary					
Recurring standing orders are pre-entered. Inidividual appoitnments are added as they are received. Software: Digitech	Informal orientation given to address passenger assistance, emphasis on courtesy and on safe driving techniques.	All are NYSDOT inspected and are maintained in accordance with those rigorous standards (equivalent to school bus requirements). We utilize Stotz Garage in Valhalla to perform these services.	We buy new vehicles through Ford and Chevrolet dealers whom we have had long-standing relationships.	3 FT	3 FT	3 FT	15 FT, 5 PT	
		Periodically	yes					
On calls. 2% reservations for airport service, using Anytime Organizer software	2-3 days training about safety, rates, rules with customers, and geography	private mechanic		6am - 11pm		24/7	14 FT, 6-8 PT	

Driver licensing requirements	# of Vehicles					Indicate level of interest in possible strategies					
	Sedans	Minivans	7-15 pass. vans	Minibuses/ small bus	Other	Providing info to a MM in a centralized call center	Trip referrals	Centralizing trip reservations, scheduling, dispatch	Contracted service provider (DR)	Contracted service provider (HHA)	Voucher program
	4	5	90			P	V	N	P	P	P
All our CDL drivers are screened, hired, and tested in accordance with Article 19A of NYSDMV. We do periodic, random drug and alcohol testing.			17		9 Ambulettes	V	V	P (private pay transport to medical facilites)	V	P	P
NY Class E license, Town of Mt. Kisco Taxi Drivers License/ vehicles license, Westchester County Drivers License (optional)	12	3				P	V	P (Accommodating extra people in taxi at the same time)	V	V	V
NY Class E license, no criminal record	11	4				P	V	V (Service for disabled or special needs people)	V	V	V

Organization	Name	Email	Travel to clients' homes						
			Agency vehicles	Metro-North train	Taxi	Personal car	Rideshare (car-/vapool)	Client's car	Other (specify)
Crickett Care	Audrey Perlman	crktcare@optonline.net		X	X	X			Buses when on routes needed
Family Services of Westchester	Stephen Riordan	sriordan@fsw.org	X	X	X	X	X		Bus

Organization	Name	Email	Travel to clients' homes						
			Agency vehicles	Metro-North train	Taxi	Personal car	Rideshare (car-/vapool)	Client's car	Other (specify)
Visiting Nurse Association of Hudson Valley	Rae Szymanski	rszymanski@VNAHV.org		X	X	X	X		
Visiting Nurse Services in Westchester	Suzanne Moses	smoses@vns.org		X	X	X			Beeline Bus

Organization	Name	Email	Travel to clients' homes						
			Agency vehicles	Metro-North train	Taxi	Personal car	Rideshare (car-/vapool)	Client's car	Other (specify)
Waterview and Salem Hills Rehabilitation Centers	Joanne Hegarty	jjohnson@wvshrehab,com							

# of vehicles					Other vehicle uses (indicate)	Time of day vehicles are not in use	Who operates the vehicles			
sedans	minivans	7-15 pass. vans	minibuses/ small bus	other			paid staff dedicated to driving	paid non-trans. staff	volunteers	other
		2			Chores for clients or agency business, but employees use them only	Sometimes: one van from 10am - 2pm	X			

# of vehicles					Other vehicle uses (indicate)	Time of day vehicles are not in use	Who operates the vehicles			
sedans	minivans	7-15 pass. vans	minibuses/ small bus	other			paid staff dedicated to driving	paid non-trans. staff	volunteers	other
		2			No	Evenings?				Subcontractor

# of vehicles					Other vehicle uses (indicate)	Time of day vehicles are not in use	Who operates the vehicles			
sedans	minivans	7-15 pass. vans	minibuses/ small bus	other			paid staff dedicated to driving	paid non-trans. staff	volunteers	other
					We use Express Taxi out of Brewster to pick up our train commuters in Brewster and transport them to the door of our facilities, and then back to the train station at the end of the shift. This service is free for our employees who come to work by train.					

#FTE Staff involved in transportation						How does your organization perform the following functions?					Location of AM employee pick-up	Where are employees dropped off in AM?
Manager or Coord.	Sched	Disp	Drivers	Mechanics	Other	ID employees who need transportation	Prepare vehicle schelues (indicate software)	Train drivers	Maintain/ repair vehicles	Obtain replacement vehicles		General drop-off
1 PT			1.75			HHA as assigned to cases by coordinator	Home Care Coordinator	HR reviews and clears all drivers	Contract with Enterprise Fleet Mgmt.	Enterprise	Downtown Mt. Vernon at FSW office on Prospect Ave.	

#FTE Staff involved in transportation						How does your organization perform the following functions?					Location of AM employee pick-up	Where are employees dropped off in AM?
Manager or Coord.	Sched	Disp	Drivers	Mechanics	Other	ID employees who need transportation	Prepare vehicle schelues (indicate software)	Train drivers	Maintain/ repair vehicles	Obtain replacement vehicles		General drop-off
1						Through assignment of cases; majority are non-drivers	Subcontractor	Subcontractor	Subcontractor	Subcontractor	Fordham train station	
3						Determined on hire	Mckesson software; Coordinators perform all scheduling	Defensive driving inservice given on hire	Employee	N/A	Leave from home	

#FTE Staff involved in transportation						How does your organization perform the following functions?					Location of AM employee pick-up	Where are employees dropped off in AM?
Manager or Coord.	Sched	Disp	Drivers	Mechanics	Other	ID employees who need transportation	Prepare vehicle schelues (indicate software)	Train drivers	Maintain/ repair vehicles	Obtain replacement vehicles		General drop-off
						They are asked during orientation and given information on the free taxi at that time; during the interview					Brewster train station	

If general point, where?	Indicate typical shifts	Day/ time of transportation provided	Vehicles full?	How often do routes/ schedules change?	# annual one-way trips	Est. annual budget for employee transportation services	Top three challenges
	9am - 5pm	7 days wk./ 8am - 5pm	Y	A couple times/ month	1,350	n/a	Costs, logistics/ locations, disruption of service due to weather

If general point, where?	Indicate typical shifts	Day/ time of transportation provided	Vehicles full?	How often do routes/ schedules change?	# annual one-way trips	Est. annual budget for employee transportation services	Top three challenges
Evening- Fordham train station	8am - 4pm	M - F, 8am - 4pm	Y	daily	11,000	$85,000	Consistency, timelines, scheduling
	7 days wk./ 8:30am - 4pm			Frequently			Cost, liability

Home Health Care Agencies and Other Employers

If general point, where?	Indicate typical shifts	Day/ time of transportation provided	Vehicles full?	How often do routes/ schedules change?	# annual one-way trips	Est. annual budget for employee transportation services	Top three challenges
Facilites front doors	3pm - 11pm; 11pm - 7am	7 days wk./ 2pm, 10pm, 11pm, 7am	Y	never			We are doing well with this new set up

Level of interest for improving coordination					Notes
Offer empty seats to other agencies	Utilize empty seats from other agency	Centralized trip scheduling and dispatching	Contract with one agency to provide transportation	Coordinating activites: vehicle procurement, driver training, vehicle maintenance	
	P	N	P	N	
P	P	N	P	P	

Home Health Care Agencies and Other Employers

Level of interest for improving coordination					Notes
Offer empty seats to other agencies	Utilize empty seats from other agency	Centralized trip scheduling and dispatching	Contract with one agency to provide transportation	Coordinating activites: vehicle procurement, driver training, vehicle maintenance	
N	P	P	V	N	
P	P	N	P	P	16 of 26 aides have their own vehicles; VNSW pays for mileage and assists with cost of insurance. Contract with fleet mgmt. company to bring workers up in van.

Home Health Care Agencies and Other Employers

Level of interest for improving coordination					Notes
Offer empty seats to other agencies	Utilize empty seats from other agency	Centralized trip scheduling and dispatching	Contract with one agency to provide transportation	Coordinating activites: vehicle procurement, driver training, vehicle maintenance	

Home Health Care Agencies and Other Employers

Organization	Name	Email	How does your organization perform the following functions:					Pre-employment Checks				
			Recruit drivers	Train drivers	Match driver w/ customers	Prepare vehicle schedules	Recognize drivers/ staff for services	Driving record	Criminal background	Proof of auto liability insurance	References	Other
North Salem FISH	Kathleen D. Sullivan	kdrsul@yahoo.com	word of mouth; Town recreation dept. puts info in the newsletter about need for drivers	Verbally advise drivers that each customer is an individual and that they need to asssess how much assistance to offer. Money is not to be accepted for	Based on who is available	N/a	Customers saying thank you seems to be enough	N	N	N	N	N

Do volunteers use own vehicles?	Any current vehicles accessible?	Mileage/ other reimbursement	One-way fare	Suggested donation	# of Volunteers	# FTE involved with transportation program				Indicate paid positions			
						Mgr./ Coord.	Sched	Disp	Other	Mgr./ Coord.	Sched	Disp	Other
Y	N	N	N	Y		One person							

Policy on Level of Assistance					Advance notice requirement	No. of annual one-way trips	Est. Annual Budget	Top three challenges	Barriers encountered to recruiting/ retaining drivers related to insurance liability	Insurance coverage for volunteers provided?
Curb-to-curb, no assistance	Door-to-door, help to and from vehicle	Door-to-door, to and from vehicle and into the main entrance	Door-through-door, enter front door of residence or destination	Other						
			X		3 days	24	$0	Distance to doctors; I would like to have more drivers to take elderly individuals shopping, not just for food, but to Kohl's, Christmas Tree Shops, etc.	Not yet	N

Indicate Level of Interest			
Centralized driver recruitment, training, and recognition	Centralized public information	Assistance with research into and resolution of insurance issues	Assistance with matching ride requests with driver
V	V	P	P

Design of a Demand-Responsive Mobility Management System for Northeast Westchester County

Final Report - Appendix 3

Technical Memorandum #4: Detailed Vision for a Mobility Management System

Howard/Stein-Hudson Associates, Inc.
CREATIVE SOLUTIONS • EFFECTIVE PARTNERING ®

Technical Memo #4:
Detailed Vision for a Mobility Management System

Design of a Demand Responsive–Mobility Management System for Northeast Westchester County

Prepared for
Westchester County Department of Transportation

Prepared by
Howard/Stein-Hudson Associates, Inc.

October 2010

Howard/Stein-Hudson Associates, Inc.
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1.0 Introduction

In late 2009, the Westchester Department of Transportation (WCDOT) in coordination with the Westchester County Department of Senior Programs and Services (WCDSPS) and a project Steering Committee, and with the assistance of the consultant team, embarked on an effort to design a demand responsive mobility management system for northeast Westchester to address the mobility needs of three target populations: older adults, persons with disabilities, and individuals with low incomes (particularly home care workers).

The geographic area covered by this project includes seven communities: the towns of Bedford, Lewisboro, North Castle, North Salem, Pound Ridge, and Somers, and the Village/Town of Mount Kisco. These communities make up the Northeast Region of the Livable Communities Connection (LCC) initiative of the WCDSPS. Active Living over Fifty (ALOFT) serves as the LCC Coordinator for the northeast Westchester region.

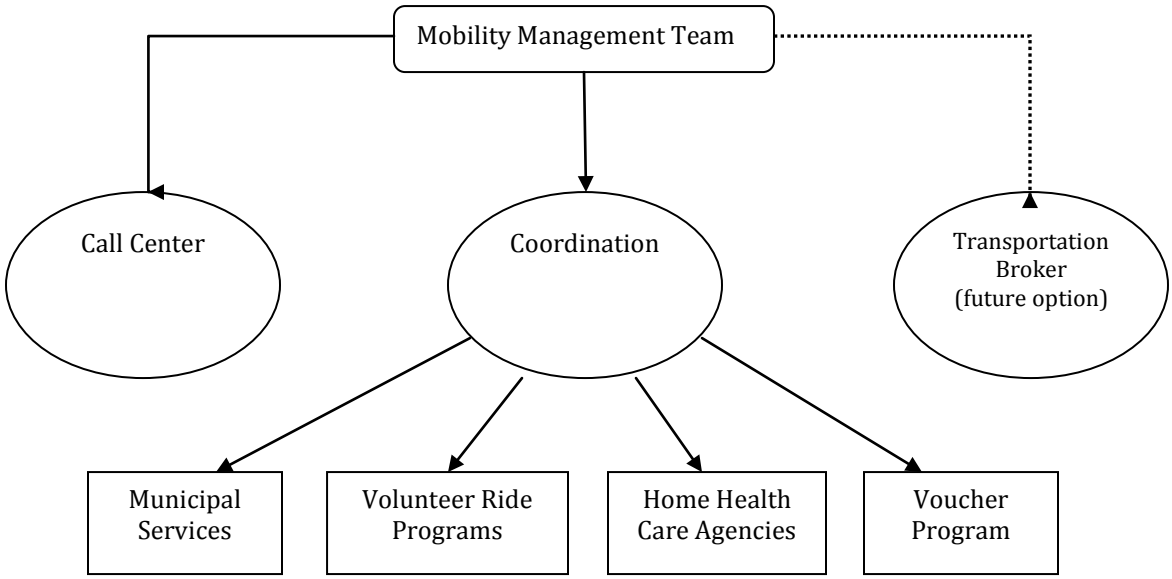
Over the past several months, the study team has met with both the project Steering Committee and Advisory Council on numerous occasions. In addition, stakeholder working group sessions were held in the spring and early summer of 2010. Based on these meetings, as well as work conducted by the project team, ALOFT and others, a vision for a mobility management system for northeast Westchester has been developed and refined.

Much of the initial work for this project was done in support of a Job Access/Reverse Commute application prepared and submitted by ALOFT to fund the initial implementation of this mobility management system. After being initially awarded the grant, ALOFT has since transferred the award to Family Services of Westchester (FSW). FSW will continue to use the approximately $990,000 in funding to implement the mobility management system.

This memorandum is the fourth and last in a series technical memoranda that have thus far presented a demographic analysis and inventory of transportation services (Technical Memorandum 1) and identified potential options for a mobility management system (Technical Memoranda 2 and 3). This document provides a detailed vision for the new Mobility Management System for northeast Westchester based on stakeholder input, best practice research, and conversations with FSW.

Central to this vision is a Mobility Management Team that will oversee the development of, and staff, a centralized Call Center as well as maintain a website that will provide transportation information and trip planning assistance to the public. The Mobility Management Team will also coordinate with stakeholder organizations including municipalities, volunteer ride programs, home health care agencies, and private transportation providers to identify potential areas of cooperation to develop and expand the provision of transportation services for the targeted populations. This overall structure is shown in Figure 1.

Figure 1: Roles and Responsibilities of the Mobility Management Team



The remainder of this document will:

- Clarify the function and supporting technologies needed for the proposed Call Center (Section 2)
- Describe the responsibilities of the Mobility Management Team (Section 3)
- Summarize the next steps in the design process (Section 4)

2.0 Northeast Westchester Call Center

One of the first tasks of the Mobility Management Team will be to establish and staff a northeast Westchester transportation Call Center. Information about non-emergency transportation services will be provided to callers over the phone, via a website, and potentially in a printed directory. Mobility Managers will also help callers to identify non-emergency transportation options for which they are eligible and that meet their needs for a particular trip.

This centralized Call Center will benefit the residents of northeast Westchester by allowing them to obtain assistance with trip planning through a single call instead of having to spend time researching options and navigating eligibility requirements and service characteristics to find an option that meets their needs. The information in the Call Center database will also benefit human service agency staff members who must assist clients with access to services or programs. The Call Center will also facilitate increased use of existing services to meet more mobility needs, and finally, as the repository of information about non-emergency transportation services and transportation needs, the Mobility Manager will have an opportunity to identify opportunities for coordination and cooperation among providers as well as opportunities to develop and expand services.

The remainder of this section explains the functioning of the Call Center, the necessary technology to support it, and the roles and responsibilities of the Mobility Management Team for managing the Call Center.

2.1 Call Center Function

The Call Center proposed here will act as a central repository for information about non-emergency transportation services available in northeast Westchester including:

- Public transit: (MTA Metro North, Bee-Line bus, Bee-Line Paratransit)
- Municipal transportation services
- Volunteer ride programs
- Private transportation services (i.e. taxis and vans)
- Ride matching (carpool/vanpool services, park and ride locations)
- Voucher programs

For each of these services, a centralized database management system (DBMS), will store information about:

- Phone numbers for reservations, schedules, customer service, general information, and special needs
- Agency or organization websites
- An overview and description of services provided
- Schedules and timetables for services (if applicable)
- Hours and days of operations
- Locations served
- Eligibility requirements (if any)
- Reservation requirements (if any)
- Vehicle types and accessibility
- Cost and any applicable discounted fares
- Types of trips provided
- Level of driver training and assistance provided for passengers with special needs

Access to the Call Center information will be achieved through three primary mechanisms:

- Direct contact with staff of the Mobility Management Team
- An automated, interactive voice response system
- A Web-based information portal

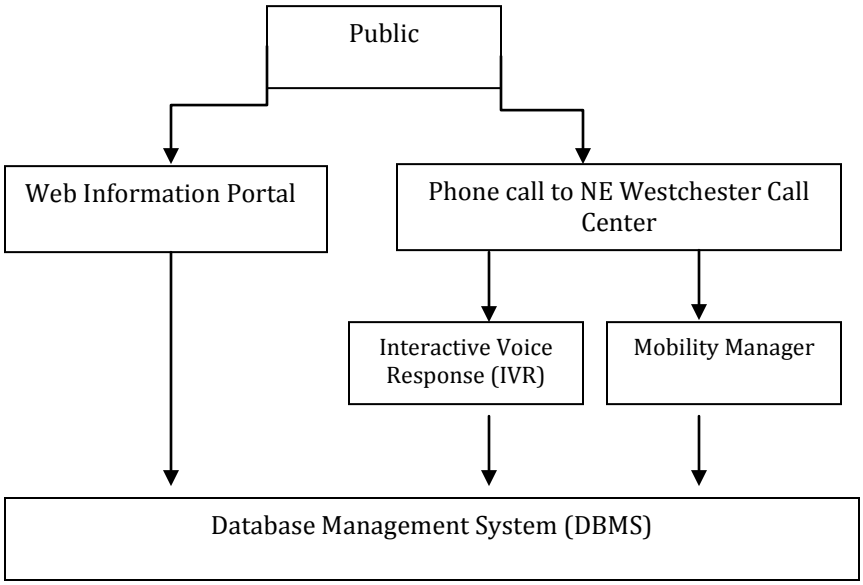
Figure 2 shows an overview of the functions of the proposed Call Center.

A user calling into the Call Center will have the initial option to speak with a member of the Mobility Management Team (during business hours TBD) or use an interactive voice response (IVR) system (required during non-business hours or when staff is unavailable). The IVR will prompt users for specifics about their transportation needs

and return a list of possible non-emergency transportation services. The users will be able to select from the list to hear detailed information about the specific service. For users who chose to speak directly with a Mobility Manager, the Mobility Manager will collect the same information about transportation needs and provide options to the caller that will best meet the caller's transportation needs.

The third mechanism for the public to retrieve transportation information from the Call Center will be through a publicly-accessible, web-based information portal. Users will access a dedicated mobility management website and respond to a series of questions and prompts. Queries sent to a backend database will return the various non-emergency transportation options available to the user.

Figure 2: Proposed Architecture of the NE Westchester Transportation Call Center



2.2 Call Center Technology

This section describes the technology that could be used for the Call Center database, interactive voice response system, and website.

2.2.1 Database Management System (DBMS)

The technology behind the DBMS will likely need to scale up over time as more information is added to the system and new functions needed. Initially a simple database solution such as Microsoft Access or MySQL will be appropriate. These systems require a fairly basic knowledge of database design and structure, can integrate with both the proposed IVR and Web-based information portal, and will meet the initial needs of the call center. In addition, the cost for acquiring these systems will be low. A copy of Microsoft Office Professional, which includes Access, can be purchased for as little as $350. MySQL Community Server is free. Both systems can run on standard

Microsoft Windows-based computers and do not require expensive server equipment or software.

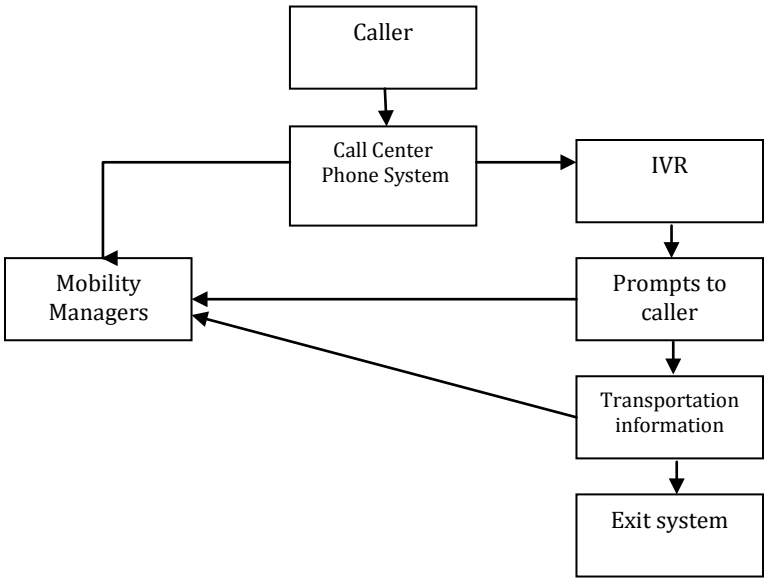
In the future it may be beneficial to upgrade the back end database technology to an enterprise-class database such as Microsoft SQL Server or Oracle. This will cost between $3,000 and $10,000 depending on desired options and licensing needs. These systems offer more robust data storage and faster data processing, but will likely require staff with knowledge of these systems or contracts with database management consultants.

2.2.2 Interactive Voice Response (IVR) System

Interactive Voice Response (IVR) systems create a computer-user interface via a telephone that is capable of detecting and understanding a caller's voice and keypad inputs. This system will allow callers to access the mobility management database via keyed or spoken response to a series of prompts. The IVR will query the DBMS based on the inputs provided, match the caller's needs with appropriate transportation options and relay that information to the caller through text-to-speech technology. The specific technology behind the IVR system at the Call Center will be determined in the Implementation Plan, though most of the current IVR vendors such as ShoreTel and Avaya offer similar functionality.

Figure 3 shows the basic function of the IVR system and notes a caller's option to leave the system to speak with a Mobility Manager (during normal business hours) at any point in the process.

Figure 3: IVR System Function



2.2.3 Website

The Web-based information portal can either be hosted internally on a dedicated Web Server or externally through a third-party Web hosting company. While internal hosting would allow for greater control and customization of the Web Server, it will also require an investment in new equipment and software as well as installation and set up costs. Initially, the Mobility Manager could contract with a third-party hosting company such as InMotion.com or GoDaddy.com. These hosting companies offer greater bandwidth, greater data security, and more robust back up and maintenance systems than could likely be achieved internally. In addition, external hosting of the website will reduce the computer infrastructure requirements as a dedicated Web-server would not be needed.

The information portal could either be coded as series of Active Server Pages (ASP) or PHP Hypertext Preprocessor (PHP) pages. Both are common website coding languages for interfacing with database systems. These languages will also allow the web designer to assign different access levels and permissions to the site for agencies, partner organizations, and the public.

3.0 Mobility Management Team Responsibilities

3.1 Call Center

The Mobility Management Team would have two primary responsibilities for the Call Center as outlined below:

3.1.1 Collecting, storing, and maintaining data

The Mobility Management Team will design and build the DBMS described above to store and retrieve non-emergency transportation information. The development of this system may either be done in-house by the team or contracted to a third party, overseen by the Mobility Management Team.

Once the DBMS is built, the Mobility Management Team will collect information on available non-emergency transportation services in NE Westchester and enter the information into the DBMS. Technical Memorandum 1 - Demographic Analysis and Inventory of Transportation Services - contained a matrix of transportation services in northeast Westchester with much of the information to be included in the database.

Maintaining the data and updating information will be of critical importance. The Mobility Management Team will be responsible for setting up a system to ensure the accuracy of non-emergency transportation information. This may include receiving automated alerts from public transit providers about temporary or permanent service changes and setting up routine procedures/coordination meetings with other services and transportation providers.

3.1.2 Ensuring public availability of data

The Mobility Management Team will ensure that non-emergency transportation information is available to the public by staffing the Call Center, developing an IVR system for the Call Center as described above, and developing a Web-based information portal. The Mobility Management Team would be responsible only for providing information; scheduling rides or making reservations will not be an initial responsibility for the team. However, through discussions and coordination with service providers this may be explored as an exceptional circumstance as the project implementation proceeds.

Three possible scenarios and responses for the Call Center are illustrated below.

- Scenario 1: Call Center receives a request for non-emergency transportation or for information
    - Mobility Manager or IVR prompts the call for information about their trips needs
    - Mobility Manager or IVR identify options available to the caller.
    - Schedule, contact, or other information is provided to the caller as appropriate
    - The Call Center will not directly connect the caller with the transportation provider
- Scenario 2: Call Center receives emergency transportation request
    - If the call is received by a Mobility Manager, the Mobility Manager will assess the situation and connect the call to 911 or refer the caller to the appropriate response agency such as police, fire, or EMS
    - If the call is received by the IVR system the caller will be told at the main greeting that the information provided is non-emergency information and to disconnect and dial 911 if emergency assistance is needed.
- Scenario 3: Call Center receives out of scope or non-transportation related request
    - Examples could include a caller looking for traffic information, answers to Medicare questions, services provided by non-transportation related social service agencies or organizations, etc.
    - Mobility Manager tries to determine the nature of the call and the needs of the caller
    - Mobility Manager refers the caller to 511, 311, or 211 if appropriate or attempts to identify the appropriate agency

3.2 Education and Marketing:

Once the Call Center has been established, the Mobility Management Team will begin the task of educating the public about available transportation options and marketing the services of the Call Center to both the public and organizations/agencies in northeast Westchester. Responsibilities will include:

- Identifying the audience for the Mobility Management System
- Assessing public and agency awareness of transportation services
- Developing marketing and branding materials
- Identifying channels to disseminate information
- Promoting and encouraging cooperation with other agencies and organizations

3.2.1 Identify audience and assess awareness of services

In order to develop an effective education and marketing program, the Mobility Management Team will need to have a firm understanding of the intended audience for the services and that audience's awareness of available transportation services in northeast Westchester. Much of this will be detailed in the Marketing Plan. However, the information will serve only as a guide and will need to be updated based on what the Mobility Management Team learns in the field through:

- Coordination with agencies and organizations
- Community meetings, discussions, and surveys
- One-on-one conversations with potential transportation users or providers

3.2.2 Develop marketing and branding materials

The Mobility Management Team will be responsible for developing clear and consistent messaging that will raise awareness of the new Mobility Management System for northeast Westchester and encourage residents to take advantage of the new system. This will require:

- Developing a logo that forms the basis of a branding effort. This logo will be incorporated into all official communication from Mobility Management Team including websites and printed communication
- Developing a series of key messages that announce the existence of the Call Center, explains its purpose and function, and provides important contact information
- Designing both electronic and print advertising material incorporating the branding and messaging. These will be tailored to specific audiences

3.2.3 Identify channels for disseminating information

In order to publicize and educate the public about the new Mobility Management System, the Mobility Management team will have to identify appropriate channels for disseminating information. This will most likely include:

- Print advertisements in local newspapers
- Public service announcements
- Direct mail and email campaigns
- Notices in local newsletters distributed by municipalities, local organizations, religious institutions, or agencies
- Flyers at senior centers, community centers, active living centers, houses of worship, supermarkets, and other locations

- Links to the Mobility Management System website on municipal and stakeholder websites
- Coordinating with local, county, and state agencies to distribute information, including possibly:
    - DMV
    - Social Security Administration
    - AARP
    - Community and local advocacy organizations
    - Municipal tax departments
    - Westchester County government

3.2.4 Speaking engagements and conference participation

Additionally, the Mobility Management Team will seek out more direct mechanisms to promote the new system such as:

- Identifying opportunities to speak at
    - Senior centers
    - Active living facilities
    - Community centers, etc
- Participating in relevant conferences and workshops.

3.3 Overall Coordination

Overall coordination between the multitude of public, private, not-for-profit, and volunteer transportation providers in northeast Westchester will be a critical function of the Mobility Management Team. In this task, Mobility Managers will act as facilitators for on-going coordination between all of the various interests and organizations involved with transportation in the region. The overall objective of the coordination effort would be to establish a mechanism for routine meetings and discussions between providers that would seek ways to:

- Increase transportation availability, particularly for seniors, the disabled, and low income workers in northeast Westchester
- Enhance the quality of existing services
- Eliminate or reduce any duplications or redundancy in services
- Improve the cost-effectiveness of transportation provision and maximize the resources used

Mobility management research identifies three key success factors for coordination that will be key challenges for the Mobility Management Team:

- Leadership of the Mobility Management Team for advocating, generating support and instituting mechanisms to achieve coordination
- Participation by stakeholders
- Continuity of the coordination effort

3.3.1 Standing Committee on Transportation in NE Westchester

The first coordination task for the Mobility Management Team will be to establish a northeast Westchester Standing Committee on Transportation. The committee will act as an advisory group and assist the Mobility Management Team in the implementation of the Cell Center and other mobility management efforts. It will be comprised of organizations that provide transportation as well as those that are users of transportation services including:

- All public transportation providers (regional, county, municipal)
- County human service agencies (DSPS, health and human services, etc)
- Private operators (taxi and van operators)
- Volunteer programs
- Private for-profit and not-for-profit organizations with transportation needs (local businesses, home health care agencies, etc.)
- Metropool
- Westchester County DOT

The current study Steering Committee and Advisory Council, combined, will form the basis for this new committee.

The Mobility Management Team, in consultation with the committee members, will determine the frequency of meetings. However, these meetings will occur on a regular basis in order to:

- Identify opportunities to coordinate, develop and enhance transportation services in Northeast Westchester
- Discuss current or impending transportation service changes and the mobility opportunities and challenges those present
- Discuss the role and function of the Mobility Management System including:
    - Assisting in the development of the Call Center by
        - Previewing and commenting on the transportation database
        - Providing feedback on the Call Center's performance and activity
    - Identifying issues, challenges, and benefits of working with the Mobility Management Team
    - Defining new responsibilities and possibilities for the Mobility Management Team
- Identify possible funding sources for additional services consistent with program funding requirements
- Assist in marketing the Call Center to committee member's constituents

3.3.2 Coordinate funding opportunities and grant applications

Beyond the Standing Committee on Transportation, the Mobility Management Team will also coordinate funding opportunities available from federal, state, county, local, or private sources. Specifically, the team will:

- Research funding opportunities for new services such as voucher programs, and provide research updates to the Standing Committee on Transportation
- Determine eligibility requirements for new funding grants
- Identify specific organizations that could apply and encourage partnerships between organizations where appropriate for specific funding sources
- Assist with preparation and submission of both individual and joint grant applications

3.4 Mobility Management

The fourth function of the Mobility Management Team will be to increase mobility options for the target populations of Northeast Westchester to be served by the Mobility Management System. This function will require coordination and facilitation with respect to volunteer driver programs, home health care agencies, developing a transportation voucher program and municipal transportation services.

3.4.1 Volunteer Driver Programs

Volunteer driver programs will also likely be reluctant to coordinate their programs through sharing drivers and/or clients. In small group discussions, representatives from volunteer programs emphasized that trust is a critical issue and necessitates that volunteer coordinators have a personal relationship with both the drivers and clients. The Mobility Management Team responsibilities will mostly entail on-going consultation and support of current programs through:

- Meetings with volunteer driver program coordinators to understand current issues, and identify areas of possible mutual assistance including:
    - Driver recruitment, training, and recognition
    - Pursuit of grant funds as a source of reimbursement for drivers
    - Public information/education about volunteer ride programs
- Coordination with the Volunteer Center to support its current efforts with ALOFT
- Promoting volunteerism in northeast Westchester
- Research on liability issues and supplemental insurance options for volunteer drivers

3.4.2 Home Health Care Worker Transportation

Home Health Care agencies offer the greatest opportunity for coordinating transportation services. Both the Steering Committee and Advisory Council noted in several meetings that older adults in northeast Westchester are often unable to obtain needed in-home health care or other assistance because workers who live outside of the area are not able to find transportation to clients' homes. Several agencies that hire and place home health aides with clients subsidize train or taxi fares for employees and/or operate vans or contract for transportation services that pick employees up at

central points and take them to central drop-off points or clients' homes. Coordinating efforts among home care agencies could increase transportation options for more workers and stretch the resources currently being applied by the agencies to this problem.

Increased transportation options for home care workers would benefit both workers, who would be able to take jobs with clients in Northeast Westchester, and older adults who are not able to obtain the in-home services they need because workers are unable to get to their homes. Home care agencies would also benefit from economies of scale that would result from working with other agencies, and from the placement of more employees in positions in the project area.

The role of the Mobility Management Team in this area will include exploring and facilitating cooperative agreements between agencies and encouraging the collaborative provision of transportation services. The Mobility Management Team will need to begin with a few specific organizations such as VNS and VNA where one has an existing contract with a transportation service provider and others may be willing to pay for single rides but cannot afford a separate service contract. The team will help agencies identify opportunities to work together and coordinate services through:

- Understanding current transportation needs of, and services provided by, home health care agencies
- Identification of:
    - Agencies with excess transportation supply (empty seats on vans)
    - Agencies with specific transportation needs (specific locations that need to be accessed)
    - Agencies with similar transportation needs (multiple agencies serving that same geographic area)
- Identification of possible partnerships between two or more agencies to utilize excess capacity or jointly contract for new transportation service
- Facilitate meetings and negotiations between agencies to develop a formal transportation relationship

3.4.3 Transportation Voucher Program

The Mobility Management Team will facilitate the development and implementation of a new transportation voucher program that will offer a cost-effective, flexible way to expand mobility options in northeast Westchester that also maximizes the use of existing transportation resources. Vouchers could be used to provide trips to clients' homes for home care workers, or for general transportation needs that cannot be accommodated by other services.

The program would be open to any entity in northeast Westchester wishing to participate. Individual agencies would be responsible for determining eligibility for

vouchers and the amount of subsidy to be paid. The Mobility Management Team would be responsible for these program elements:

- Identification of municipal or agency sponsors and participating providers
- Assisting sponsors with setting up their voucher program and associated administrative procedures and forms, including:
    - Determining the amount of subsidy to provide
    - Eligibility requirements
    - Mechanisms to distribute vouchers
- Facilitating negotiations between sponsor and providers for
    - Standard fares
    - Distance fares
    - Multiple passenger discounts
    - Peak/off-peak fares
    - Invoicing and payment systems
    - Distribution and collection of vouchers
- Coordinating applications for JARC/New Freedom or other grants for supporting voucher programs
- Publicizing the voucher program
- Printing vouchers
- Data collection and reporting on the voucher program

3.4.4 Municipal Transportation Services

At present, all seven communities in the project area operate some level of demand responsive transportation service for eligible residents. Eligibility is generally restricted to older adults, and days/hours of service, trip purposes, and service areas are limited.

Based on discussions with stakeholders in support of this study design effort, municipalities will likely be reluctant (at least initially) to coordinate or consolidate their existing transportation services. However, the Mobility Management Team will focus on consultation and education through:

- Regular meetings with municipal transportation representatives to:
    - Understand the issues and challenges each is facing
    - Promote the benefits of service coordination
    - Discuss ideas for coordination of services, driver training, and or vehicle maintenance
    - Discuss possibilities for jointly operating new routes or services that offer greater mobility for local residents at reduced costs for the municipality
- Research on municipal service consolidation efforts in New York State and its applicability to northeast Westchester
- Research on policy issues at the federal level for coordinating services that are federally funded

3.5 Transportation Brokering (future possibility)

Transportation brokering responsibilities would not be expected in the first several years of the program. Additionally, these services may not be possible within the current structure of Family Services of Westchester and may require basic institutional changes in the Mobility Management Team.

In this regard, one of the most challenging tasks the Mobility Management Team may address in the future is that of acting as a transportation broker between those entities that have available transportation and those that have clients who need transportation. As the Mobility Management System evolves the Mobility Management Team can explore the possibilities of:

- Active ride matching between transportation providers and those needing transportation by
    - Gathering information about transportation needs and availability
    - Identifying available transportation options
    - Matching riders to available options and relaying that information to the appropriate provider
    - Coordinating with Metropool for other ride matching or vanpool options
- Full administration of a transportation voucher program including:
    - Negotiating contracts
    - Establishing fares
    - Invoicing and payment
    - Distribution and collection of vouchers

4.0 Next Steps

The next step in the design of the Mobility Management System in northeast Westchester will be to reconvene both the Steering Committee and Advisory Council to get input on the current system design. Following those meetings, detailed implementation, funding and sustainability, and marketing and education plans will be developed that will act as manuals for the mobility management staff.

4.1 Implementation Plan

The implementation plan will include the following:

- Complete description of the coordinated Call Center and coordination effort including participating agencies and their roles, operational and administrative structure, and staffing requirements
- Job descriptions for Mobility Managers and other Call Center staff
- Next steps and recommended best practices, including identification of successful programs elsewhere, for developing each of the four components of the Mobility Management System: volunteer driver programs; home health care

worker transportation; transportation voucher programs (including mechanics of a voucher program); and coordinated municipal transportation.
- For preferred technology alternatives that have been identified, a description of the functionality needed and a list of potential vendors and products, and estimate of cost
- Unresolved issues, if any

4.2 Financial Plan

The financial plan will cover three years as well as funding recommendations for later years. The steps involved in the development of the financial plan include:

- Indentify contingencies for different levels of demand for the Call Center services
- Estimate operating and capital costs for
    - The call center and its technological components
    - The coordination efforts of the Mobility Management Team
    - The new transportation voucher program
- Identify potential funding sources

4.3 Marketing and Education Plan

The marketing plan will address four basic elements:

- Product – a description of the Mobility Management System services in simple, clear language that will be easily understandable by potential customers
- Audience – identification of the target audience for the mobility management services and the best methods to reach and communicate with this audience, which may include both traditional and non-traditional approaches
- Awareness – ways to assess the current awareness and understanding of demand responsive services and optimal ways to increase education about the services using the best identified methods to reach the target audience
- Delivery – clear explanation of how the services will be delivered to customers and the opportunities available to them to provide feedback about the quality and performance of the system

The draft implementation and marketing plans will be prepared and submitted to the Steering Committee for review, together with the draft financial plan.

Appendix A – Small Group Meetings and Project Meetings

Conference Call with Volunteer Center of the United Way

June 25, 2010 – 10:00 AM to 11:00 AM

Meeting Attendees

Alisa H. Kesten	Volunteer Center of the United Way
Eridania Camacho	Volunteer Center of the United Way
Shannon Cobb	Volunteer Center of the United Way
Virginia Johnson	WCDOT
Catherine Wynkoop	Active Living Over Fifty (ALOFT)
Caryl Weinstein	WCDSPS

Consultant Team

Arnold Bloch	Howard/Stein-Hudson
Scott Giering	Howard/Stein-Hudson

Meeting Summary

Welcome and Introductions
Arnold Bloch opened the meeting by welcoming everyone and thanking them for participating.

Study Background and Identified Challenges
Arnold Bloch and Scott Giering recalled the challenges identified in previous meetings.

Discussion

The Volunteer Center is very interested in helping to identify volunteers and making stronger connections in northeastern part of county.

Operation of the Volunteer Center

- As a connector organization it identifies volunteers and encourages people to volunteer
  - Connects volunteers with the appropriate organization or cause
  - Most volunteers want to volunteer in their own community
- They make sure needs of non-profits are known and can be clearly supplied and promoted
  - Conducts a lot of outreach to educate the public
  - Works with business community to support employee volunteerism

Relation to Transportation

- Not in the transportation business
- Received grant to reimburse people in the RSVP program

    - RSVP volunteer drivers s can received limited reimbursement for travel: $.31/mile, capped at $35
    - Partners with organizations like FISH to provide volunteers

Potential Call Center

- 211 call center is underutilized
    - United Way supported
    - Wonderful place to turn to for someone who could identify services, needs, hours of programs
    - Need to include 211 in planning and make sure coordinating
    - Critical to ensure that the database of information is good
- Call center could direct potential volunteers to Volunteer Center
    - In return, the Volunteer Center would direct people looking for rides to Call Center

Ideas for consideration:

- Include the Volunteer Center database in the Call Center
- Promote the Call Center through the newsletter and other mechanisms
- Volunteer Center willing to assist in any way possible

Mobility Management & Coordinated Municipal Services Meeting

Conference Call

June 28, 2010 – 10:00 AM to 11:00 AM

Meeting Attendees

Liz Dieter	Village/Town of Mount Kisco
Jean Arra	Village/Town of Mount Kisco
Louise Paolicelli	Town of Pound Ridge
Virginia Johnson	WCDOT
Catherine Wynkoop	Active Living Over Fifty (ALOFT)
Jeanne Pici	WCDSPS

Consultant Team

Arnold Bloch	Howard/Stein-Hudson
Scott Giering	Howard/Stein-Hudson

Meeting Summary

Welcome and Introductions

Arnold Bloch opened the meeting by welcoming everyone and thanking them for participating.

Study Background and Identified Challenges

Arnold Bloch and Scott Giering recalled the challenges identified in previous meetings.

Discussion

Transportation Services

- Mount Kisco
  - Senior Nutrition Program
    - 15-person bus which brings seniors to the nutrition center, the grocery store 1-3 times a week, and pharmacies 1-2 times a month.
  - Recreation program
    - Transportation only for Mt. Kisco residents
    - Paid for by village
- FISH (Friends in Service Helping) has volunteer drivers in Mt. Kisco, but does not typically operate outside of Mt. Kisco.
  - Drivers do not often accept payment for rides
  - Primarily transports seniors to medical facilities

- Currently there is no coordination between Mount Kisco Senior Nutrition program and FISH.
    - They are separate transportation issues.
- Pound Ridge
    - 1 van to grocery store on Wednesday
    - Volunteers
        - Neighbor to neighbor
        - Generally only in Pound Ridge , but will go elsewhere

Voucher Program
- Mt. Kisco does not have a voucher program

Call Center
- Could do eligibility screening
    - Each town has its own criteria for eligibility
    - Might need county-wide eligibility criteria

Eligibility
- Pound Ridge tries to reach out and find people who need help.
- Mt. Kisco nutrition program has specific federally required eligibility rules.

Challenges/issues to consolidating services
- Distances
- Transporting residents across municipal boundaries
- Funding (towns don't want to pay to transport residents from other towns)
- Cancellations
- Liability and risk management

Opportunities
- People would like to have more options.
- Anything that would save municipalities money might be possible.

Coordinated Home Health Care Worker Transportation Meeting

Administration Building – St. Patrick's Catholic Church
Bedford Road
Bedford, NY

June 28, 2010 – 2:00 PM to 4:00 PM

Meeting Attendees

Audrey Perlman	Crickett Care
Laura Rossi-Ortiz	Westchester Community Foundation
Charlotte Smith	Visiting Nurses Association of Hudson Valley
Carol Ryan	MetroPool
Suzanne Moses	Visiting Nurse Service in Westchester
Irene W. Sandford	At Home in Somers, Center for Aging in Place Support
Tuesday McDonald	the Preservation Company
Susan Norwell	Dominican Sisters Family Health Service
Catherine Wynkoop	ALOFT
Jeanne Pici	WCDSPS
Virginia Johnson	WCDOT

Consultant Team

Arnold Bloch	Howard/Stein-Hudson
Scott Giering	Howard/Stein-Hudson

Meeting Summary

Arnold Bloch and Scott Giering recalled the challenges identified in previous meetings.

Participants were asked to introduce themselves and talk about existing ride programs they are aware of.

Existing Services

- VNA
  - Provides two van services: Pick up home health care workers at Fordham M-N station and take to 1) Yorktown area and 2) towns and communities west of I-684.
  - VNA had tried to pair with Medicaid to service underserved areas, but there are not enough patients in NE Westchester to make the partnership feasible.
  - VNA also will also pay for half the M-N fare, and provide taxi vouchers.
- VNS
  - VNS and Westchester Care at Home (WCAH) are contracting with a van company.

        - There are twelve seats
        - Eight need to be filled to break even on the cost.
        - There is one pick-up location: Fordham train station.
        - Unsure whether paying for vans is cheaper than using vouchers for taxis.
    - VNS will subsidize bus passes and provide petty cash for some cab service.

Mobility Manager

- Challenges
    - Would need to handle cancellations and time/schedule changes.
    - Area agencies need to check their records to determine the demand for servicing Northeast Westchester.
- Opportunities
    - Assist patients looking beyond a particular agency to decide which is right for them - Medicare, Medicaid, etc. taking into consideration regulated time and visit mandates and guidelines.
    - Coordinate between the agencies in order to fill empty seats on vans.
        - This could help smaller providers that cannot afford to contract out transportation.
        - Could notify organizations when seats are available.
        - Could put people who need to travel for other reasons on the same vans as home healthcare workers.
    - Could also take over the coordination of getting workers into taxis.
    - Help get more home health care workers with Westchester origins.
    - Marketing
        - Target bulletins, Westchester Magazine, clergy associations, "Penny Savers", websites, Metro Pool, Care Giver, Livable Communities, Physicians, Elder law attorneys, 211/DSPS.
        - Look to the Preservation Company's intergenerational volunteer programs as a best practice model.
    - Training
        - Could be very difficult because each agency has different training requirements.

Possible Solutions

Shared Van Service

- Agencies would have to guarantee payment for a certain number of seats.
- Vans are being paid by the month or the week, not by the miles.
- Some organizations would benefit from shared van service but couldn't guarantee a number of seats each month.
    - Open seats, when available, could be marketed to organizations who can't guarantee the seat.

Agency Coordination

- For there to be a form of coordinated transportation, it will have to be a consortium of agencies – through a combination of guaranteeing seats or buying them on an ad hoc basis.
- There are 53 licensed agencies that service Westchester.
    - Many of those agencies won't have large enough numbers to participate in the program from the start

Vouchers

- Existing voucher programs were set up directly between the agency and the taxi company.
- Cab companies don't like to pick up the home health aides because they don't tip.
    - The agency would rather not build a tip into the voucher, as they're already providing the taxi companies with a lot of business.
- Area taxi companies have a limited number of vehicles, which is a challenge when trying to deal solely with one company.
- Taxis might be able to pick up multiple workers to reduce the per-rider cost.
    - A voucher program could supplement the program for the last leg of the trip, possibly putting multiple health aides into a taxi.
- Vouchers could be coordinated into a centralized system.
    - This might yield a better rate.

Next Steps

- Identify the demand for home health care workers in NE Westchester
- Ask taxi drivers if they would agree to cluster home health aids at a certain train station and give a discount.
    - If one person in a group isn't using a voucher, would they still get a reduced rate?
    - Territory issues.
- **The consensus was to start small, as a pilot with a few agencies, and then grow in an effort to develop coordinated transportation among agencies in transporting their workers.**

Volunteer Ride Program Meeting

DRAFT SUMMARY

Administration Building – St. Patrick's Catholic Church
Bedford Road
Bedford, NY

June 29, 2010 – 10:00 AM to 12:00 PM

Meeting Attendees

Diana Gennano Tully	ALOFT
Bea Rieser	ALOFT & FISH Bedford/Mt. Kisco
James Wood	FISH
John Schurdak	St. Patrick's Senior Neighbors
Louise Paolicelli	Town of Pound Ridge & Neighbor-to-Neighbor
Diane Fulves	ALOFT
Sadie Candela	ALOFT
Catherine Wynkoop	ALOFT
Jeanne Pici	Westchester Department of Senior Programs & Services
Virginia Johnson	Westchester Department of Transportation

Consultant Team

Arnold Bloch	Howard/Stein-Hudson
Scott Giering	Howard/Stein-Hudson

Meeting Summary

Study Background and Identified Challenges

Scott Giering gave a brief background on the project and recalled the challenges identified in previous meetings. Participants were asked to introduce themselves and talk about existing ride programs they are aware of.

Discussion

Examples

- Volunteer Transportation Center, Inc. of Watertown, NY is very effective. Linda Welsh is Deputy Executive Director of that program and there is a website the team should explore.

Existing Westchester Programs

- Neighbor-to-Neighbor in Pound Ridge
  - Started 15 years ago.
  - Takes people shopping on Wednesdays.

- Is available to take people to doctor's appointments.
- One person asks for five rides a month – this may be too many to offer one person.
- Most people want rides 1-4 times per year.
- Long trips to the hospital are hard to match with volunteers.
- There are no requirements for advanced reservations.
- Most volunteers want nothing in return.
- Volunteers who do not want payment are often more willing than those who do.
- Some people will run errands for people but don't want to put them in their car because of:
    - Comfort level with strangers
    - Insurance
- When someone calls in for a ride, the coordinator sends an e-mail to 200 people to find a volunteer.
    - Sometimes volunteers do not respond to an e-mail and need to make personal phone requests.
    - Sometimes a month goes by with no one calling for a ride.
    - Coordinator doesn't ask why volunteers cannot provide rides.
    - It is important for the volunteer list to continue to see the requests, even if they cannot provide the ride – it serves as a reminder of the need for volunteers.

- FISH in Mount Kisco
    - Started 45 years ago.
    - Services Mt. Kisco, Bedford, Bedford Hills, and Katonah.
    - Needs more volunteers.
    - Does not have special or supplemental insurance for drivers
        - Believes Good Samaritan laws provide enough coverage.
    - Volunteers do not request any form of payment.
    - Receives 5-10 calls a day.
    - Limited to medical trips.
    - There is a volunteer on-call every day.
        - Some volunteers are full-day, others half.
    - Most calls occur in the AM.
    - Director says: "We are in over our heads. We don't have enough volunteers."
- St. Patrick's Senior Neighbors
    - Provides transportation and other types of assistance.
    - Everything from a single ride to 2-3 rides per week for doctor's appointments.
    - Other reasons for trips include the grocery store and inclement weather.
    - Anyone can call, not just those affiliated with St. Patrick's.
    - Drivers vary depending on the time of year – less during vacation time and less during inclement weather. (Note: Inclement weather is both a reason why people want trips and a reason why hard to get drivers.)
    - Most people make arrangements a few days in advance.
    - Client perspective:
        - Found out from bulletin on Senior Citizen meeting.
        - Was not easy to ask for help because of fear of refusal.

        - Has offered to pay volunteers for gas/parking/lunch.
        - Did not know drivers at first, but trusted the program coordinator.
        - Lasting friendships have developed.
    - Senior ride program should be better advertised.

Challenges for volunteer programs

- Cancellations (driver and passenger).
- Weather.
- Vacations.
- 1-5pm is a tough time to get drivers because of school pick-ups.
- Decline in volunteerism
    - It's nice to have seniors helping seniors, but there needs to be new blood coming in.
    - People are too busy with other commitments to volunteer.
- If volunteers aren't used, they ask to be taken off the list.
- Don't always know if volunteers' licenses are valid or if they have a bad driving record.

Mobility Manager

- Challenges
    - Takes away the personal connection that people like.
    - Must be sensitive to the important needs of the person calling – whether they're going to a doctor's appointment or the store.
    - Programs are resistant to giving up trip matching control.
    - Volunteers are often specific to a certain geographic area and won't perform tasks outside of it.
    - Vouchers wouldn't make much of a difference in getting volunteers.
- Opportunities
    - Might get more people to ask for help because they won't feel like they're bothering anyone.
    - Coordinating/recruiting volunteers
        - But, volunteer coordinators want to know who the other drivers are.
        - Could be helpful in recruiting volunteers.
        - Recruit volunteers from other social communities – elementary school parents, for example.
    - Help determine if people are eligible for programs such as Paratransit to avoid filling out unnecessary paperwork.
    - Set up semi-regular meetings with various organizations
        - However, volunteers and program coordinators do not have a lot of time for additional meetings.
    - Assistance with insurance
        - Low-cost supplemental insurance is available for volunteer drivers.

Next Steps

- Have volunteer groups get together every few months to discuss issue and possible areas or coordination.

Voucher Program Meeting

Administration Building – St. Patrick's Catholic Church
Bedford Road
Bedford, NY

June 29, 2010 – 2:00 PM to 4:00 PM

Meeting Attendees

Jose Hidalgo	Katonah Taxi
Maria Martinez	Katonah Taxi
Charlotte Smith	VNA HHS
Chris D. Andritsopoulos	WCOFD/Para Transit Coordinator
Pamela Veith	Bedford Program Coordinator for Seniors
Louise Paolicelli	Town of Pound Ridge
Miguel Duarte	KES Taxi
Catherine Wynkoop	ALOFT
Jeanne Pici	WCDSPS
Virginia Johnson	WCDOT

Consultant Team

Arnold Bloch	Howard/Stein-Hudson
Scott Giering	Howard/Stein-Hudson

Meeting Summary

Study Background and Identified Challenges

Arnold Bloch and Scott Giering recalled the challenges identified in previous meetings.

Discussion

Existing Services

- Katonah Taxi
    - Provides service to Katonah, Mt. Kisco, Bedford Hills, Bedford Village, Somers, Goldens Bridge, Yorktown, Pound Ridge, and Mount Kisco. (10-15 towns)
    - Drivers go as far east as Ridgefield.
    - Customers include people going from the train to work and back.
    - Seven cars – six black Lincoln Town Cars and one SUV, one owner-operated and the rest company-owned.
        - Can fit portable wheel chairs in the trunk.
        - Drivers would require additional training for accessible vehicles.

- Busiest times of day are 7am-10am and 3pm-6pm; slowest time is 10am-2pm.
- Has a contract with Four Winds Hospital (psychiatric hospital).
  - The hospital approached the taxi company.
  - Transports discharged patients to train station or home.
  - Billed monthly, no minimum required.
- Also has a contract with Metro-North in the form of a voucher program for Guaranteed Ride Home for HART riders between Connecticut and Katonah MN station. .
  - Charges per mile, up to a 50-mile radius.
  - Billed once a month.
    - At the end of the year, if they go beyond their budget, there's a 2-3 month delay in payment.
- Other companies or employers leave their credit card on file.
- Trying to grow business through website, www.katonahtaxi.com.
- Pick up 3-4 home health care workers a day.
  - Sometimes drop one worker off and bring another to the station.
- Would offer discounts for regular service.
- Would offer a discount for multiple home health care workers going to the same area.
- Contracted clients get first priority.

- VNA HHS
  - Has county-wide voucher contracts with two taxi companies.
    - $1000/month with Ernie's Taxi.
    - $2000/month with Kisco Cab.
    - Vouchers are not discounted.
  - Not all cab companies want to do the vouchers.
  - Doesn't have a lot of clients in Northeast Westchester, partially because of the difficulty in getting people there.
    - Will pay up to around $15-20 for each voucher trip; Most places in NE Westchester would be more than that
  - VNA pays half the train and all of the cab fare.

- Kisco Express Service (KES)
  - No voucher programs in place.
  - A program such as the one in place with Katonah would be of interest.
    - Wouldn't need a minimum number of customers.
    - Busiest times of day are the 15 minutes before and after the top of each hour – e.g., 6:45am -7:15am.

- Paratransit
  - Mandated to provide service from ¾ mile of a bus route – anywhere beyond that is a courtesy.
  - No voucher system, but a ticket system where people can buy a book of 10 tickets for $40.

- All drivers become 19A certified, have commercial drivers licenses (CDL) and undergo a background check.
- Once looked into a voucher system before a possible strike. Out of 27 taxi companies contacted, 4 responded, 2 attended a meeting. The companies needed a minimum guarantee of customers.
- Current contract precludes Paratransit from participating in a voucher program – contract expires in 2012 (2-year contract, 3-year option).

Possible Solutions

- Future vouchers for Paratransit operations (after current contract) to see if there are trips that could be passed off to a taxi in the form of a voucher, which would save the County money.
- Katonah Taxi might be willing to charge as little as $10 per worker each way (based on multiple fares in the same cab).
  - $20/day for 5 days a week is still a lot for VNA.
  - VNA would prefer to be charged a discounted flat rate per week or month.
- Taxi companies, during the slow time from 10am-2pm, could help transfer workers between 4-hour shifts (8am-12pm and 1pm-5pm).
- The same company that trains Paratransit drivers could train taxi company drivers to assist passengers with disabilities.

Challenges

- Non-profits aren't willing to put up capital.
- Sponsorship.

Mobility Manager Responsibilities

- Issue vouchers.
- Coordinate with agencies for payment.
- Taxi companies would prefer to deal with one entity rather than multiple agencies.