DCHC MPO

DURHAM - CHAPEL HILL - CARRBORO - METROPOLITAN PLANNING ORGANIZATION

Coordinated Public Transportation – Human Services Transportation Plan

March 14, 2007

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Prepared by:

Triangle Transit Authority

on behalf of the

Durham – Chapel Hill – Carrboro MPO

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I. Introduction

The Durham-Chapel Hill-Carrboro Metropolitan Planning Organization (DCHC-MPO) is the regional organization responsible for transportation planning for the western part of the Research Triangle area in North Carolina.

The DCHC urbanized area, first designated by the 1980 Census, covers all of Durham County, a portion of Orange County including the Towns of Chapel Hill, Carrboro, and Hillsborough, and Northeast Chatham County. DCHC is also one of the four urban areas in North Carolina designated as a Transportation Management Area (TMA) by the Transportation Equity Act for the 21st Century (TEA-21). TMA's are urban areas with a population of over 200,000 people.

The DCHC-MPO is an umbrella organization comprised of the Transportation Advisory Committee (TAC), the Technical Coordinating Committee (TCC), local governments, and the State. The TAC, designated by the Governor, is a policy body that coordinates and makes decision on transportation planning issues. Its major responsibility, prior to the passage of the federal transportation law in 1998 known as TEA-21, had been to fulfill the requirements of the Federal Highway Act of 1962. These regulations require those urban areas with a population of 50,000 or more conduct a Continuing, Comprehensive, and Cooperative (3-C) transportation planning process. An integral element of this 3-C process is the development of a long-range transportation plan. In North Carolina, this long-range transportation plan is carried out by the North Carolina Department of Transportation (NCDOT) for municipalities and urban areas. This is mandated by 1959 North Carolina General Statute 136-66.2, which requires all municipalities to have a long-range transportation plan which is mutually adopted by both the governing body of the respective municipalities and NCDOT.

II. Purpose

> Many of the needs identified through this planning process are common to all would-be users, and strategies to address them would improve the system for the broader community. For this reason, it is appropriate to view this plan as a guideline for future strategies to improve the transportation system in the region.

With the passage of the federal transportation law, known as SAFETEA-LU, in 2005, projects receiving funding under the Job Access/Reverse Commute program or the New Freedom program must be "derived from a locally developed, coordinated public transit - human services transportation plan." Further, the law requires that this plan be "developed through a process that includes representatives of public, private, and nonprofit transportation and human services providers and participation by the public."

As the area's regional transportation planning organization, the DCHC-MPO has taken the lead in developing a coordinated regional public transit-human services transportation plan (CPT-HSTP). DCHC-MPO has worked in collaboration with the public transportation agencies and community transportation programs in the MPO's jurisdiction, to respond to SAFETEA-LU requirements. The purpose of this plan is to help improve transportation services for persons with disabilities, older adults, and individuals with lower incomes in the Durham, Orange, and Chatham County area through a better coordinated transportation system. Many of the needs identified through this planning process are common to all would-be users, and strategies to

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address them would improve the system for the broader community. For this reason, it is appropriate to view this plan as a guideline for future strategies to improve the transportation system in the region.

The plan will provide a framework for the development of projects that will address the transportation needs of the target populations, by ensuring that this three-county area and its public transportation and human service agencies coordinate transportation resources offered through multiple Federal Transit Administration (FTA) programs. The end result of this plan will offer a new annual application and evaluation process for public transportation agencies, human service agencies, and private entities to request Job Access and Reverse Commute (JARC, Section 5316) and New Freedom (Section 5317) funding. These projects will become a part of this area's ongoing Metropolitan Transportation Improvement Program (MTIP), which includes all federally funded transportation projects being implemented.

This report documents the process and the recommendations that have been developed through this coordinated planning effort.

III. Background

The Job Access Reverse Commute grant program (Section 5316, or JARC) is intended to fund the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment (Job Access); and to transport residents of urban centers, rural and suburban areas to suburban employment opportunities (Reverse Commute). Job Access grants can be used for capital and operating costs of equipment, facilities, and capital maintenance related to providing access to jobs. Costs to promote transit for workers with nontraditional work schedules, the use of transit vouchers, and the use of employer-provided transportation are also covered. Reverse Commute grants can be used for operating, capital and other costs associated with providing reverse commute service by bus, train, carpool, vans or other transportation services. Activities that the Federal Transit Administration has determined are eligible for JARC funding are listed in the box on the right.

JARC Grant-Eligible Activities

- Late-night and weekend service
- Guaranteed ride home service
- Shuttle service
- Expanded fixed-route public transit routes
- Demand-responsive service
- Ridesharing and carpooling activities
- Transit related aspects of bicycling
- Local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides
- Marketing promotions for JARC activities
- Supporting the administration and expenses related to voucher programs
- Using Geographic Information System (GIS) tools and/or implementing Intelligent Transportation Systems (ITS)
- Integrating automated regional public transit and human service transportation information, scheduling and dispatch functions;
- Deploying vehicle position-monitoring systems
- Establishing regional mobility managers or transportation brokerage activities.

Federal funds for the program are allocated on a discretionary basis, with 60 percent going to areas with population over 200,000; the federal/local share is 50/50.

According to FTA, the purpose of the New Freedom Program is to provide improved public

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transportation services, and alternatives to public transportation, for people with disabilities, beyond those required by the Americans with Disabilities Act of 1990 (ADA). Funds will cover capital and operating costs to provide that new service. Examples of eligible activities are listed in the box below. Federal funds are allocated on a discretionary basis, with 60 percent to areas with population over 200,000. Matching share requirements are flexible.

Examples of New Freedom Grant-Eligible Activities

- Enhancing public transportation beyond the minimum requirements of the ADA
- Providing "feeder" services
- Making accessibility improvements to transit and intermodal stations
- Providing travel training
- Purchasing vehicles to support new accessible taxi, ridesharing, and/or vanpooling programs
- Covering the administration and expenses of new voucher programs for transportation services offered by human service agencies
- Supporting new volunteer driver and aide programs
- Supporting new mobility management and coordination programs among public and/or human service transportation providers.

IV. Plan Approach

North Carolina has been a leader in moving to coordinated human service transportation programs, known as community transportation programs (such as Orange Public Transportation, Durham Access, and Chatham Transit Network). Each of the three counties in the DCHC-MPO region has an existing community transportation improvement plan addressing human service and rural transportation services in each county. Furthermore, there have been initial efforts to look at a regional human services transportation system, coordinating or consolidating services between Durham, Orange, and Wake counties. This CPT-HSTP built on this history, bringing together the community transportation providers, urban and regional public transportation providers, and other stakeholders to identify opportunities to coordinate the community transportation services with the urban public transportation services for customers throughout the MPO.

The principle underlying this approach is that the stakeholders that interact with our transportation system can identify the gaps in the existing system, and collectively prioritize the needs. Rather than relying heavily on a data-intensive planning effort, the project planning team relied on the experience and expertise of a broad group of stakeholders.

The Project Planning Team included representatives from the following organizations:

- Durham Area Transit Authority (DATA)
- Chapel Hill Transit
- Durham County Community Transportation (ACCESS)
- Orange Public Transportation
- Chatham Transit Network
- Durham – Chapel Hill – Carrboro MPO Lead Planning Agency
- North Carolina Department of Transportation

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- Triangle Transit Authority (also providing staff support to this planning process)

The Project Planning Team developed a list of organizations that were invited to the two stakeholder workshops (See Table 1.) These organizations represented a broad array of interests, including elected officials, city/town/county managers, appointed transportation advisory boards, local and regional public and human service transportation providers, county social service agencies, latino advocacy organizations, private transportation providers, hospitals, chambers of commerce, and advocates for persons with disabilities.

There were thirty-one (31) participants in the first stakeholder workshop on November 1, 2006 and thirty-five (35) participants in the second stakeholder workshop on December 14, 2006. Over the course of the two workshops, representatives from the following organizations participated in the identification or prioritization of coordinated transportation needs.

Participating Stakeholder Organizations

Alliance for Disability Advocates, Center for Independent Living
A Helping Hand
Chapel Hill Transit
Chapel Hill Transportation Board
Chatham Transit Network
Durham Area Transit Authority
Durham – Chapel Hill – Carrboro MPO Lead Planning Agency
Durham Community Collaborative
Durham County ACCESS
Durham Department of Social Services – Work First
Durham Housing Authority
Durham County Transportation Advisory Board
Durham Regional Hospital
Durham System of Care
El Centro Hispano
El Centro Latino
Helping Hands of America
NCDOT – Public Transit Division
O.E. Enterprises
OPC Area Program
Orange County Department of Social Services
Orange County Transportation Advisory Board
Orange Public Transportation
Orange Unified Transportation Board
Triangle J Council of Governments
Triangle Transit Authority Accessible Services Advisory Committee
UNC Hospital
XDS, Inc. (Cross-disabilities advocates)

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Table 1. Stakeholder Workshop Invited Organizations

Local Elected Boards	**Regional / Local Transportation Agencies**
Carrboro Board of Alderman	NCDOT
Chapel Hill Town Council	DCHC-MPO Staff
Durham City Council	
Durham County Commission	**Non-Profit Organizations**
Chatham County Commission	El Centro Hispano
Orange County Commission	El Centro Latino
Hillsborough Town Council	El Futuro, Inc.
	The Community Backyard
Local Managers	The Mental Health Association in Orange County
Carrboro Town Manager	Durham Community Collaborative
Chapel Hill Town Manager	
	Private Providers of Human Services Transportation
Chatham County Manager	Senior Care Management Associates
Durham City Manager	Non-Emergency Medical Transit Authority
Durham County Manager	A Helping Hand
Orange County Manager	Helping Hands of America
TTA General Manager	
Local Advisory Boards	**Medical Facilities**
Carrboro Transportation	Duke University Medical Center
Chapel Hill Transportation Board	UNC Memorial Hospital
Chatham Transportation Advisory Board	
DATA Board	**Chambers of Commerce**
Durham Transportation Advisory Board	Durham Chamber Workforce Development
Orange Transportation Advisory Board	Chapel Hill - Carrboro Chamber of Commerce
TTA Board of Trustees	
Local Public Transportation Providers	
Chapel Hill Transit	
Chapel Hill Planning Department	
Chatham Transit Network	
DATA	
Durham County Access	
Orange Public Transporation	
Triangle Transit Authority	
Local Social Services Agencies	
Chatham Department of Social Services	
Durham Department of Social Services	
Orange Department of Social Services	

V. Inventory of Human Services Transportation and Public Transportation

As a first step in the project, we developed an inventory of the available public and private transportation options for the target populations. The information provided below is for the publicly funded and operated transportation providers. In addition to these organizations, there are a variety of private taxi operators (with and without lift-equipped vehicles) and non-profit organization that provide transportation as one of several services to elderly or handicapped individuals.

Community Transportation Providers

Durham County ACCESS, Orange Public Transportation (OPT), and Chatham Transit Network are the community transportation providers in this three-county area.

Durham County ACCESS

Durham County ACCESS is the principal county-wide human service transportation service provider in Durham County. ACCESS primarily serves the clients of Durham County community service agencies but also serves rural general public needs throughout Durham County. ACCESS also makes trips to and from the City of Durham and offers both subscription and demand response services. ACCESS connects with Durham Area Transit Authority.

Contacts – Johnny Ford, Durham County ACCESS (919) 560-0520

Service Area – Durham County, urbanized and rural areas

Service Type – Subscription and Demand Response

Customers – Contract Agency clients and rural general public

Hours of Service – Monday - Saturday, 5:30am - 12:30am, Sunday 6:30am – 7:30pm

Price/Fares – Individual rural general public trips: $2.00 each way.

Publicity/Marketing – ACCESS conducts passenger surveys, agency surveys and has developed a rider's guide. Marketing and outreach efforts are conducted by the contract agencies that DCA serves, as the agency clients are the main beneficiaries of the service.

Orange County Public Transportation (OPT)

The OPT program, a division of the Orange County Department on Aging, offers bus and van service outside the Chapel Hill/Carrboro city limits including planning and coordination for county residents with transportation needs. Trips may end in Chapel Hill and/or Carrboro but must begin outside of these jurisdictions. The Orange County Transportation Advisory Board (TAB) comprised of human service agencies and representatives of transportation systems, advises OPT on its operations and recommends policy to the Board of Commissioners. OPT connects with Chapel Hill Transit and Triangle Transit Authority.

Contacts - Jerry Passmore, Orange Public Transportation Director, (919) 245-2009;
Al Terry, Orange Public Transportation Supervisor, (919) 245-2002

Service Type - Fixed route, deviated fixed route, demand response and subscription routes.

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Hours of Service – Monday - Friday, 6:00am - 7:00pm and Saturday, 8:00am - 5:00 pm

Service Area - Orange County excluding Chapel Hill/Carrboro (trips must start outside of these jurisdictions but can end anywhere in Orange County.

Customers - Clients of contract agencies and rural Orange County residents

Price/Fares - vary depending upon the route and service provided. The fixed public route is $2.00 per trip ($1.00 if elderly or disabled). Dept of Social Services medical trips are charged back to the department (the client does not pay). General public fares (demand response) are $12.75 per trip. Senior center trips are cost sharing only. Contract agency subcription cost = $19.00 per hour and/or $.45 per mile.

Publicity/Marketing - Public forums, newspaper, website, logos on vehicles, brochures

Chatham Transit Network (CTN)

Chatham Transit Network (CTN) is the countywide transportation provider for Chatham County. CTN is not a governmental agency, but is a 501(c)(3) private non-profit consolidated transportation system operating in Chatham County, NC. CTN offers subscription route and demand/response transportation by contractual agreement with human service organizations. CTN serves all of Chatham County, both urban and rural areas and is governed by a Transportation Advisory Board.

Contact – Helen Stovall, CTN Executive Director, 919 542-5136

Service Area – Chatham County. Trip must originate in Chatham County but CTN will go anywhere within the state of NC, the only provisions is that service must be open to the public and advertised as such.

Service Type – CTN currently provides both subscription route and demand-response service.

Customers – Contract agency clients and limited general public. The general public transportation service is primarily provided for the elderly, disabled, transportation disadvantaged and economically disadvantaged riders.

Hours of Service – The office is open from 8-5 each weekday. The hours of operation of our vehicles are totally dependent on what the customer wants. CTN does not in any way limit itself to restrictive hours of operations. The only provision is that the trip must be open to the public and advertised as such. Currently, CTN operates from 5:00 AM to 10:00 PM weekdays and 8:00 to 3:00 on Saturdays. Occasionally trips are provided on Sunday night for JARC riders.

Fare/Prices – CTN current rates are $.77 per mile and $20.11 per hour. A flat rate is charged for medical trips which include wait time and deadhead miles and hours.

Publicity/Marketing - CTN distributes and stock brochures at various human service agencies. Catch phrase advertising on CTN vehicles with catch phrases like “Have a court date? Don’t be late. Take Transit.” CTN has a number of these signs provided in both English and Spanish which are posted on the outside of transit vehicles. Additionally ads are placed in local newspapers and CTN participates in community events.

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Urban Paratransit Providers

DATA ACCESS, Chapel Hill EZ Rider, and TTA Paratransit provide demand-response services to persons with disabilities who meet local eligibility criteria.

Durham Area Transit Authority (DATA) -ACCESS

DATA ACCESS is the name of the ADA paratransit service for the City of Durham. DATA ACCESS is sponsored by the Durham Area Transit Authority (DATA). Only riders who meet the criteria specified by the ADA and who have been certified as eligible can use DATA ACCESS. Persons do not qualify automatically just because they have a disability or on the basis of age. Eligibility is based on a person's functional limitations. DATA ACCESS provides curb-to-curb transportation service for eligible riders. DATA ACCESS operates service to all locations within the City of Durham and to any location outside the City that is three-quarters of a mile of any fixed-route service operated by DATA. The DATA ACCESS taxicab program provides ACCESS customers greater freedom and mobility. This program offers ACCESS customers the option of using taxicab service for their transportation needs at a cost of half the regular taxicab fare. DATA ACCESS is governed by an 8 - member Board of Trustees.

Contact – Steve Mancuso, Transit Administrator, (919) 560-1535 Ext. 209;
Tara Caldwell, Laidlaw Transit Services, Project Manager, (919) 560-1555, ext. 306

Service Area – Durham City and Chapel Hill for Medical trips

Service Type – Provide curb-to-curb trips for any purpose.

Customers – 60 percent of clients are certified ADA clients and the others are certified through Social services or Rural General Public.

Hours of operation – Monday-Saturday, 5:30am – 12:30am, Sunday 6:30am – 7:30pm

Fares/Price – $2.00 general public but costs to agencies are based on revenue hours at the end of each month.

Publicity/Marketing – Clients find out about ACCESS through clinics, social services or other clients.

Chapel Hill Transit/EZ Rider

Offered in connection with Chapel Hill Transit, EZ Rider is a special service which uses lift equipped vehicles to transport individuals with mobility limitations that prevent them from using Chapel Hill Transit's regular bus service. Riders should be ADA certified or certified by their physician in order to use the service. Demand Response and Subscription services up to 6 months at a time are available.

Contacts – Henry DePietro, Operations Manager, (919) 968-2755, Ext: 121;
Ceberettia Hinton, Assistant Operations Manager, (919) 968-2755, Ext: 122

Service Area – Town of Chapel Hill

Service Type – Provide trips to the disabled for any purpose.

Customers – ADA-eligible individuals that are certified due to a disability or health condition that prevents them from using the fixed-route system.

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Hours of operation – 6:15am to 2:00 am, Monday through Friday. 8:05 am to 6:30 PM on Saturday. Weekday evening and Sunday service is available through another Chapel Hill Transit service called Shared-Ride.

Fares/Price – Free

Publicity/Marketing – Chapel Hill Transit distributes a EZ Rider brochure that highlights the eligibility process, service parameters and scheduling. Additionally, public forums, newspapers and the www.chtransit.org website have served to promote awareness of this demand-response transit service.

Triangle Transit Authority- Paratransit Service

The Triangle Transit Authority's (TTA) paratransit system operates in accordance with the Americans with Disabilities Act and is designed to serve individuals whose disabling conditions or functional limitations prevent them from using TTA fixed route services.

Contacts – Laurie Barrett, Director of Bus Operations, (919) 485-7451; Transit Manager, (919) 485-7466

Service Area – Trips must begin and end within ¾ mile from fixed route TTA bus service on Raleigh, Durham, and Chapel Hill routes. TTA's paratransit service area includes routes 105, 107, 402, 403, 412, 413, the RTP Shuttle area, and RDU Airport.

Service Type - Provide trips to the disabled for transportation regardless of trip purpose.

Customers – ADA-certified clients that are unable to use the fixed-route system due to a disability or health condition. Most riders are commuting to work.

Hours of operation- Monday – Friday, 6am - 10:20pm, Saturday 6:30am - 6:30pm

Fares/Price – $4.00 one-way

Publicity/Marketing - TTA distributes a paratransit services brochure that highlights the eligibility and application process. Additionally, public forums, newspapers, flyers, and the www.ridetta.org website promote awareness of TTA's accessible transit services.

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Fixed-Route Urban Public Transportation Providers

Chapel Hill Transit and DATA provide local fixed-route bus service within their jurisdictions. TTA provides regional bus services between the communities and to other jurisdictions in Wake County.

Chapel Hill Transit

Chapel Hill Transit operates public transportation services within the Towns of Chapel Hill and Carrboro and on the campus of the University of North Carolina. This service area is located in the southeast corner of Orange County, North Carolina. The types of services operated include fixed route bus service, EZ Rider service (for mobility impaired) and Shared Ride Service.

Contacts – Steven Spade, Transportation Director, (919) 968-2752;
Kurt Neufang, Assistant Director. (919) 968-2775 ext. 114

Service Area – Town of Chapel Hill and Town of Carrboro

Service Type – Fixed route, Shared-ride feeder zones

Customers – general public, majority of riders are affliated with UNC-CH and UNC Hospital

Hours of Service – Mon-Fri, 4:50am - 1:00am, Sat 8:30am - 2:50am, Sun 10am - 11pm

Price/Fares – Free

Publicity/Marketing – www.chtransit.org

Durham Area Transit Authority

The City of Durham assumed the operation of the local bus system in 1991, naming it Durham Area Transit Authority (DATA). DATA contracts for the provision of its fixed route service and paratransit service every five years. The fixed route system includes 165 employees and 50 buses providing over 13,000 passenger trips daily on 19 different bus routes. The paratransit system includes 43 vans and 57 employees transporting clients to various places within the City of Durham.

Contacts – Steve Mancuso, Transit Administrator, (919) 560-1535 Ext. 209;
Pierre Osei-Owusu, Senior Transportation Planner, (919) 560-1535 Ext. 214;

Service Area – City of Durham and urbanized areas of Durham County

Service Type – Fixed Route

Customers – general public

Hours of Service – Monday - Saturday 5:30am - 12:30am, Sunday 6:30am - 7:30pm

Price/Fares – Individual: $1.00 per trip.

Publicity/Marketing – http://data.durhamnc.gov/Index_DATA.cfm

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Triangle Transit Authority

The TTA was created to plan, finance, organize, and operate a public transportation system for the Triangle area, which includes Orange, Durham and Wake Counties. TTA has three main program areas: Regional Bus, ridesharing services and regional transit planning. TTA serves the general public with the majority of users being commuters and students. TTA is governed by a thirteen member Board of Trustees. Ten members are appointed by the region's principal municipalities and counties and three members are appointed by the North Carolina Secretary of Transportation.

Contacts – David King, Interim General Manager, (919) 485-7424
Laurie Barrett, Director of Bus Operations, (919) 485-7451
John Tallmadge, Director of Commuter Resources, (919) 485-7430

Service Area – Urbanized areas of Durham, Orange and Wake Counties

Service Type – Fixed Route, demand-response shuttle in RTP area, vanpool, carpool matching

Customers – general public, primarily Triangle area commuters

Hours of Service – Monday – Friday 6am – 10:20pm, and Saturday 6:30am – 6:30pm

Price/Fares – Individual: $2.00 per trip for regional bus service, $2.50 per trip for express bus service; vanpool fares are subscription based and determined by trip length and number of van riders.

Publicity/Marketing – TTA-specific information is provided on-line at **www.ridetta.org.** TTA also manages a region-wide website at www.gotriangle.org. Beginning in March 2007, TTA will staff a regional public transportation information call center.

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VI. Needs Assessment

The Needs Assessment was conducted according to the recommendations of the Federal Interagency Coordinating Council on Access and Mobility, also known as United We Ride. They provided a tool, the "Self-Assessment Tool for Communities" (See Appendix C), as part of their Framework for Action program for developing coordinated transportation plans. The Project Planning Team supplemented this tool with another document soliciting input on service gaps (See Appendix D). These Self-Assessment documents were used during the first stakeholder workshop.

Thirty-one participants representing urban public transportation providers, community transportation systems, social service agencies, hospital patient care management, transportation advisory boards, advocates for persons with disabilities, advocates for Latino residents, and others met on November 1st to assess the current transportation system in the Durham, Orange, and Chatham county area.

Things We Do Well

While there was not unanimity among participants, these four themes recurred in the discussions at the Workshop.

1. There is positive interest and momentum among staff, elected officials, and interested stakeholders in providing well-coordinated transportation services.
2. The public transportation and human services transportation is generally offered at an affordable cost to the customers.
3. The systems are collecting data on core performance measures.
4. The transportation systems are reasonably effective job at putting customers first in the provision of services. (There were more widely varied opinions shared about this item.)

The participants worked in five different groups, each representing a diversity of perspectives. Following time for each individual to assess the current transportation system on 26 criteria, the groups discussed what they believe we are doing well and areas where we need to do better. They recorded their discussions and shared the major points with the full workshop. In the box to the left, the major themes that emerged from these discussions are listed.

There were other areas where groups or individuals believe that the transportation system is functioning well, but there was not necessarily broader agreement. These were compiled from the 26-question Individual Assessments completed by the participants.

The results indicate that the top five areas where participants felt that the system is doing well or that there is only limited need for improvement are:

1. There is positive momentum to coordinate public transportation and human service transportation services (68% indicated that this is done well or needs only limited action).
2. Clear data is systematically gathered and analyzed on core performance issues (64% indicated that this is done well or needs only limited action).
3. Facilities have been located to promote safe, seamless, and cost-effective transportation services (61% indicated that this is done well or needs only limited action).

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4. Marketing and communications programs are used to build awareness and encourage greater use of services (57% indicated that this is done well or needs only limited action).
5. Leaders and organizations have defined the need for change and articulated a new vision for the delivery of coordinated transportation services (57% indicated that this is done well or needs only limited action).

The participants also discussed aspects of the transportation system that need improvement. There was recognition by most participants that there are a number of areas where the transportation systems can function better to meet the needs of people with limited incomes, the elderly, and persons with disabilities, as well as the general citizenry.

From the Individual Assessments, the top five areas where participants felt that the system needs to make significant improvement are:

1. There is a need for a centralized dispatch system to handle requests for transportation services from agencies and individuals (64% indicated that this needs to begin or needs significant action).
2. There needs to be an arrangement among diverse transportation providers to offer flexible services that are seamless to customers (57% indicated that this needs to begin or needs significant action).
3. Travel training and consumer education programs should be available on an ongoing basis (50% indicated that this needs to begin or needs significant action).
4. There should be an inventory of community transportation resources and programs that fund transportation services (50% indicated that this needs to begin or needs significant action).
5. The specific transportation needs of various target populations should be well documented (46% indicated that this needs to begin or needs significant action).

Areas Where We Need to Improve

The areas that repeatedly came up in group discussions are described below.

1. Transportation system coordination can be improved to make cross-county travel easier.
2. Service is very limited or unavailable on evenings, weekends, and holidays.
3. Service is very limited or unavailable in most of the rural areas of Durham, Chatham, and Orange counties.
4. The transportation systems can do a better job of providing an array of user-friendly and accessible information sources.
5. There is no centralized system to handle requests for transportation services and information from agencies and individuals.
6. There is interest in applying technology improvements to the human services transportation and ADA – paratransit systems.
7. There needs to be a better flow of information among transportation providers, human services agencies, other stakeholders, the public and funding agencies.

Areas Where Participants Had Questions

The top five questions where participants felt that they did not have enough information to provide an opinion are:

1. Is there a strategy for systematic tracking of financial data across programs? (50% indicated that they were not familiar enough to score this question)

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2. Is there an automated billing system in place that supports the seamless payment system and other contracting mechanisms? (50% indicated that they were not familiar enough to score this question)
3. Is the plan for public transportation - human services transportation coordination linked to and supported by other state and local plans such as the Regional Transportation Plan or State Transportation Improvement Plan? (39% indicated that they were not familiar enough to score this question)
4. Are transportation line items included in the annual budgets for all human service programs that provide transportation services? (39% indicated that they were not familiar enough to score this question)
5. Has the use of technology in the transportation system been assessed to determine whether investment in transportation technology may improve services and/or reduce costs? (36% indicated that they were not familiar enough to score this question)

All the information from the individual assessments, the small group reports, and the full workshop discussion was reviewed and assimilated by the Project Planning Team into the list of needs in Table 2. This list of needs was used as the starting point for discussion at the second stakeholder workshop.

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Table 2. List of Needs Identified During Workshop #1

(Italicized font indicates changes made because of discussion and consensus reached during Workshop #2.)

Service Coordination

1. Improve transfer wait times between services
2. Reduce transfer requirements between services
3. Coordinate ~~*headways*~~ *timing of service* in corridors served by multiple agencies
4. Coordinate transfers between demand-responsive services and fixed-route services
5. Centralized dispatching of community transportation and ADA paratransit services *(demand-response + flex routes)*

Service Availability

6. Early morning service (before 8am)
7. Evening service (5pm until 10 pm)
8. Late night service (10pm until 2am)
9. Saturday service
10. Sunday service
11. Holiday service
12. Services providing access to childcare facilities for low-income workers
13. Intra-county and cross-county services within rural areas
14. Intra-county and cross-county services connecting rural areas to urban areas
15. Additional wheelchair-accessible vans available at reasonable cost for unrestricted travel
16. There is a lack of public transportation to and from the airport (including Sunday service)
17. Affordable trips from hospitals for discharged patients

Information Coordination

18. Single customer information call center for all transportation options
19. Mobility manager helping customers identify transportation options to meet their needs
20. Single website expanded to include all transportation resources
21. Travel training
22. Consumer education on transportation options available
23. Joint accessible transit information materials
24. Coordinated placement of transportation information materials
25. Current inventory of community transportation resources
26. More and better information at bus stops and stations
27. More information provided to case managers
28. Spanish language information in print, website, and on telephone
29. More frequent updates on the status of regional rail project and other regional transportation projects
30. All regional partners need to work together in changing the negative perception of bus transit/bus dependent population and making transit a choice of preference for more residents

Fare Payment Coordination

31. "Capped" or free transportation for transportation-disadvantaged populations
32. Multiple payment options for the customer
33. Universal fare card that works on all services

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Service Quality

34. Demand-responsive services should use routes ~~*designated*~~ *coordinated* by dispatch, ~~*not*~~ *and* drivers' knowledge
35. Better on-time performance for fixed-route and paratransit
36. Consistent announcements, audible inside and outside of vehicles, of stop, route/destination, and direction information on all ~~*multi rider*~~ *fixed-route* services
37. Improved customer service training for phone customer service representatives and vehicle operators
38. ~~*Many*~~ *T*ransportation systems ~~*are inefficient*~~ *should be more efficient.* ~~*and uncomfortable to ride*~~

38a. Services should be more comfortable to ride

Service Eligibility

39. Many customers in need have difficulty meeting criteria for service/trip.
40. Paratransit application process needs to be streamlined, clarified, and consistent across agencies.
41. Eligible customers in need of transportation should be issued a temporary paratransit permit during application review.
42. Unified regional eligibility determination and certification for all agencies and services.

Note: During discussion, the group suggested combining #'s 40 and 42.

Community Involvement

43. More input from customers, human services agencies, and transit agencies on regional transportation needs
44. More open communication between the human service agencies, service providers and the funding organizations, (primarily DCHC MPO and NCDOT)
45. More input is needed from the community and there needs to be more awareness of opportunities to provide input for improving service
46. There is a need for a joint human service agency board to provide input on human service transportation needs

47. Regular Collection of Customer Satisfaction Ratings

48. Create Accessible Services Advisory Committees (DATA, CHT)

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VII. Prioritization of Needs

Thirty-five participants representing urban public transportation providers, community transportation systems, social service agencies, hospital patient care management, transportation advisory boards, advocates for persons with disabilities, advocates for Latino residents, and others met on December 14th to prioritize the transportation needs that had been identified during the prior workshop.

The workshop began with a presentation of information on six key topics that had been raised during the initial workshop (the overview documents are included as Appendices E-J). These topics were:

- Service availability during off-peak periods (i.e., early morning, evening, night, and weekends)
- Eligibility requirements for ADA paratransit, community transportation demand-response, and contract-based services.
- Technologies available to improve coordination of transportation
- Prices and payment options
- Public transportation information sources
- Other transportation planning activities

Following this presentation, the participants worked in five different groups, to review the list of needs identified in the prior workshop, and to suggest clarifications or additions to the list. These changes are highlighted in red font on the revised List of Needs document.

Then, individually, each participant identified five top priorities for action, and five additional priorities, placing sticky dots next to the listed item. There were ten needs that received five or more "top priority votes." These included:

- Mobility manager helping customers identify transportation options to meet their needs
- Intra-county and cross-county services connecting rural areas to urban areas
- Paratransit application process needs to be streamlined, clarified, and consistent across agencies.
- Unified regional eligibility determination and certification for all agencies and services.
- All regional partners need to work together in changing the negative perception of bus transit/bus dependent population and making transit a choice of preference for more residents
- "Capped" or free transportation for transportation-disadvantaged populations
- Universal fare card that works on all services
- Better on-time performance for fixed-route and paratransit
- Reduce transfer requirements between services
- Consistent announcements, audible inside and outside of vehicles, of stop, route/destination, and direction information on all fixed-route services

Additionally, there were three other needs that received ten or more "total votes." These were:

- Travel training
- More and better information at bus stops and stations

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- There is a need for a joint human service agency board to provide input on human service transportation needs

The last activity of the workshop was a discussion of the priorities that had been selected. During this discussion, the group was asked to evaluate whether there were some items that were surprisingly omitted or included in the top priorities. Also, the group was asked to clarify the intent of some of the top priorities. The key points of this discussion were:

- None of the items for additional service during off-peak hours rose to the top of the priority list, despite extended discussion of these needs during the first workshop. One explanation for this was that the splitting of the need into specific times and days diluted the support for it. There were suggestions for grouping the items and ranking them as grouped.
- The interest and support for travel training extends to customers, transportation provider staff, and the support network for customers (e.g., family, caregivers).
- There was also discussion about item 15 in the list of needs – "Additional wheelchair-accessible vans available at reasonable cost for unrestricted travel." There were several components to this issue, including a desire for lower costs to the end user for privately provided services, the availability of more accessible vehicles regardless of owner at all hours of the day, and the integration of private and non-profit accessible vehicles into the resources that are available.
- Finally, there was a consensus that the items "Paratransit application process needs to be streamlined, clarified, and consistent across agencies" and "Unified regional eligibility determination and certification for all agencies and services" were not distinct and should be combined.

The Project Planning Team reviewed the results of this workshop and makes the following recommendations:

- It is fair to group evening (#7) and late night (#8) service together, yet separate from the other off-peak service periods.
- Early morning service (#6) and services providing access to childcare facilities for low-income workers (#12) should be combined.
- The marketing/public relations recommendation (#30) should be indicated as a top tier recommendation, but should not be included in the list recommended for JARC/New Freedom project solicitation.
- Items related to unifying and streamlining the paratransit eligibility determinations (#40 and #42) should be combined. We will need to determine whether projects to address these needs are eligible for JARC and New Freedom funding.
- We agreed that items that had 6 or more "top tier" or "green" priority votes or at least 11 total priority votes would be considered Top Tier Priorities for project solicitation for JARC and New Freedom funds. The list includes 7 priorities - #19,14, 7/8, 40/42, 33, 35, and 21.

With these recommendations, the list of prioritized needs is organized in Table 3 with 8 top tier priorities, and groups of second and third tier priorities.

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Table 3. Prioritization Scores of Needs From Workshop #2

Needs with more than 6 top votes or 11 or more total votes

- Evening service (6pm until 10 pm) and late night service (10pm until 2am) **(7 top votes,15 total votes)**
- Intra-county and cross-county services connecting rural areas to urban areas **(10,16)**
- Mobility manager helping customers identify transportation options to meet their needs **(12,14)**
- Travel training **(4,11)**
- All regional partners should work together to change the negative perception of bus transit/bus dependent population, making transit a choice of preference for more residents (**6,15)**
- Universal fare card that works on all services **(6,12)**
- Unified regional paratransit application and eligibility and certification process needs to be streamlined, clarified, and consistent across agencies **(14, 27)**
- Better on-time performance for fixed-route and paratransit **(6,10)**

Needs with 2 or more top votes and 5 or more total votes

- Improve transfer wait times between services **(2, 6)**
- Reduce transfer requirements between services **(5,6)**
- Coordinate transfers between demand-responsive services and fixed-route services **(4,6)**
- Centralized dispatching of community transportation and ADA paratransit services (demand-response + flex routes) **(4,8)**
- Early morning service (before 8am), especially providing low-income workers access to childcare facilities **(5,9)**
- Saturday service and Sunday Service **(4,8)**
- Additional wheelchair-accessible vans available at reasonable cost for unrestricted travel **(2,9)**
- Single customer information call center for all transportation options **(4,8)**
- Consumer education on transportation options available **(2,7)**
- More and better information at bus stops and stations **(3,10)**
- Spanish language information in print, website, and on telephone **(2,6)**
- Consistent announcements, audible inside and outside of vehicles, of stop, route/destination, and direction information on all fixed-route services **(5,9)**
- Improved customer service training for phone customer service representatives and vehicle operators **(3,7)**
- "Capped" or free transportation for transportation-disadvantaged populations **(6,9)**
- Many customers in need have difficulty meeting criteria for service/trip **(3,5)**
- Eligible customers in need of transportation should be issued a temporary paratransit permit during application review **(2,6)**
- There is a need for a joint human service agency board to provide input on human service transportation needs **(3,10)**

Other Needs

- Coordinate timing of service in corridors served by multiple agencies **(2,4)**
- Holiday service **(no votes)**
- Intra-county and cross-county services within rural areas **(2,2)**
- There is a lack of public transportation to and from the airport (including Sunday service) **(3,4)**

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- Affordable trips from hospitals for discharged patients **(3,4)**
- Single website expanded to include all transportation resources **(1,4)**
- Joint accessible transit information materials **(1,2)**
- Coordinated placement of transportation information materials **(1,1)**
- Current inventory of community transportation resources **(3,4)**
- More information provided to case managers **(1,2)**
- More frequent updates on the status of regional rail project and other regional transportation projects **(0,2)**
- Multiple payment options for the customer **(1,4)**
- Demand-responsive services should use routes coordinated by dispatch, and drivers' knowledge **(1,3)**
- Transportation systems should be more efficient **(2,3)**
- Services should be more comfortable to ride **(no votes)**
- More input from customers, human services agencies, and transit agencies on regional transportation needs **(1,5)**
- More open communication between the human service agencies, service providers and the funding organizations, (primarily DCHC MPO and NCDOT) **(1,2)**
- More input is needed from the community and there needs to be more awareness of opportunities to provide input for improving service **(2,3)**
- Regular Collection of Customer Satisfaction Ratings **(0,1)**
- Create Accessible Services Advisory Committees (DATA, CHT) **(no votes)**

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VIII. Major Findings and Recommendations

Through this planning process, it became clear that there is a significant amount of enthusiasm on the part of stakeholder groups to be involved in taking steps to create a coordinated public transportation – human service transportation system. The collective wisdom of the broader group, which included public and private transportation providers, human service agencies, advocates, and representatives of public advisory bodies, identified many needs to be addressed, and priorities among them.

Experience around the nation has shown that it is important to remember that the development of a coordinated transportation system will take many years. Over that time, most, if not all of the identified needs will need to be addressed. However, in order to achieve progress, it is important to identify the top priorities for action. **The Project Planning Team assimilated the outputs of the two workshops and developed the following recommendations:**

1. The full list of prioritized needs (Table 3) should be used by the DCHC-MPO Transportation Advisory Committee as a guide for decision-making on policy and investments related to further coordination of the public transportation and human service transportation systems.

2. There are seven top priorities that should be considered for funding through the JARC and New Freedom grant solicitation process. These are:
   - Mobility manager helping customers identify transportation options to meet their needs
   - Intra-county and cross-county services connecting rural areas to urban areas
   - A unified regional paratransit application and eligibility determination and certification process needs to be created that it is streamlined, clarified, and consistent across agencies.
   - Evening service (6pm – 10pm) and late night service (10pm – midnight)
   - Universal fare card that works on all services
   - Better on-time performance for fixed-route and paratransit services
   - Travel training

3. The Community Transportation Systems in Durham, Orange, and Chatham counties should be invited to appoint representatives to the TCC Subcommittee on Transit/TDM. This subcommittee is should review and score the project applications received each year.

4. Following the initial year, the annual solicitation for applications for JARC and New Freedom Fund projects should follow the schedule below:
   - MPO issues publishes solicitation of projects — January
   - Applications due — April
   - TCC Transit/TDM Subcommittee reviews and scores proposals — May
   - TCC action on Transit Subcommittee recommendations — May meeting
   - TAC action on TCC recommendations — June meeting

5. The DCHC-MPO should convene an annual workshop with interested stakeholders to discuss progress on addressing this plan's priority needs, to solicit feedback on changes as they occur, and to gauge whether priorities are shifting.

6. The Project Planning Committee should continue to meet quarterly to continue developing action plans to address the prioritized needs identified through this plan.

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IX. Project Selection Process

The federal transportation law, SAFETEA-LU, requires that projects receiving funding under the Job Access/Reverse Commute program or the New Freedom program must be "derived from a locally developed, coordinated public transit - human services transportation plan." Rather than developing specific strategies, services, or projects for funding, this plan identifies seven top priority needs to be addressed. This allows the flexibility of applicants to propose strategies for addressing these needs, and puts the MPO in the position of evaluating competing proposals, as required under the federal guidance.

The Project Selection process should be conducted annually, as long as JARC and New Freedom grant funds are available. The solicitation of projects should be announced as early in each calendar year as is feasible, to provide applicants with ample time to develop complete proposals. During this first year, the solicitation announcement would follow the Transportation Advisory Committee's approval of this document. In subsequent years, the solicitation announcement should occur earlier.

All applicants should be required to submit a completed application (see attachment K) in April. This would allow enough time for the application evaluation and approval process to be completed by the June meeting of the Transportation Advisory Committee (TAC). Applications should be reviewed and scored by the Transit/TDM Subcommittee of the Transportation Coordinating Committee (TCC). This subcommittee would make funding recommendations to the TCC, who in turn would make final recommendations to the TAC. The criteria recommended for use in evaluation of competing applications are listed in the box at right.

The intent is that the selected projects each year will enable all the stakeholders to cooperatively move toward a coordinated transportation system. This will better serves the needs of all our customers, but particularly those who have traditionally been transportation-disadvantaged.

All applications must meet the following:

1. The proposed project must be a non-duplicative service or program.
2. Eligible matching funds must be identified and available.
3. The proposed project must be a new or expanded service or program.
4. The primary focus of the proposed service or program must serve the target populations (i.e., persons with low-income for the JARC funds, or persons with disabilities or elders for the New Freedom funds).
5. The project must benefit the Durham – Chapel Hill – Carrboro urbanized area.

Eligible applications will then be evaluated on the following criteria:

1. *Project Need/Goals & Objectives (30%)*
   - Fit with high-priority needs identified in the Coordinated Plan
2. *Quality of the implementation plan (20%)*
3. *Project Budget (15%)*
   - Efficiency (estimated cost per new customer)
   - Financial sustainability beyond grant period
4. *Partnerships and Outreach (20%)*
   - Effectiveness of proposed partnerships
   - Strength of stakeholder support
   - Quality of marketing/outreach plan
   - Geographic range of project benefits
5. *Program Effectiveness and Performance Indicators (10%)*
   - Quality of the evaluation plan
6. *Innovation (5%)*
   - Applicability of innovative ideas elsewhere in region

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APPENDIX A

Frequently Asked Questions: Job Access and Reverse Commute Program

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FREQUENTLY ASKED QUESTIONS
Job Access and Reverse Commute Program

1. What is the purpose of the Job Access and Reverse Commute (JARC) Program?

JARC supports the development and maintenance of transportation services so that welfare recipients and eligible low-income individuals can access jobs and job-related activities.

2. What level of funding is available for the program?

A total of $602.5 million is available for the program from FY2006 to FY2009, starting at $138 million in FY2006 and rising to $164.5 million in FY 2009. Funding is subject to the Congressional appropriations process.

3. How are funds allocated?

Funds are formula apportioned based on the population of welfare recipients and eligible low-income individuals. Nationally, 60 percent of the funds goes to designated recipients in urbanized areas with populations of 200,000 or more; 20 percent goes to States for urbanized areas between 50,000 and 200,000; and 20 percent goes to States for non-urbanized areas.

States have the flexibility to shift funds between funding categories for urbanized areas with less than 200,000 in population and non-urbanized areas, if the Governor certifies that all of the objectives of JARC are being met in the area from which funds are being shifted. States may fund projects anywhere in the State, if the State has established a statewide program to meet JARC objectives.

In urbanized areas with populations of 200,000 or more, the designated recipient must solicit applications and make competitive selections, in cooperation with the Metropolitan Planning Organization (MPO). In non-urbanized areas and urbanized areas with populations of less than 200,000, the State will conduct a Statewide solicitation for applications and make competitive selections. Recipients must certify that allocations to sub-recipients are distributed on a fair and equitable basis.

States may transfer funds to FTA's urbanized or non-urbanized area programs as long as funds are used for JARC purposes and for projects selected through the competitive process. These transfer provisions are intended to ease the administrative burden for grantees that may get funding under another FTA program. It allows States to submit one grant application for both programs, and provides options for States that choose not to have an oversight role for transit agencies in small urbanized areas.

States that transfer funds to Section 5307 (Urbanized Area Formula Grant Program) must certify that JARC projects have been coordinated with nonprofit providers of services.

4. How may JARC funds be used?

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Funds may be used for capital expenses with Federal funds provided for up to 80 percent of the cost of the project, or operating expenses with Federal funds provided for up to 50 percent of the cost of the project.

All projects funded must be derived from a locally developed, coordinated public transit-human services transportation plan (a "coordinated plan"). The planning process must involve representatives of public, private, and nonprofit transportation providers, human service providers, and the public.

There is no limit on the level of funds that can be used for operating expenses.

A designated recipient or State may use up to 10 percent of the funds made available under the JARC program for planning, administration and technical assistance.

Match for FTA funds can come from other non-Department of Transportation Federal sources that allow their funds to be used for transportation purposes, such as Health and Human Services.

5. What types of projects may be funded under the program?

Projects include but are not limited to:

- Developing new or expanded transportation projects or services that provide access to employment opportunities;
- Promoting public transportation by low-income workers, including the use of public transportation by workers with nontraditional work schedules;
- Promoting the use of transit vouchers for welfare recipients and eligible low-income individuals;
- Promoting the use of employer-provided transportation, including the transit pass benefit program under section 132 of the Internal Revenue Code of 1986;
- Subsidizing the costs associated with adding reverse commute bus, train, carpool, van routes, or service from urbanized areas and other than urbanized areas to suburban workplaces;
- Subsidizing the purchase or lease by a nonprofit organization or public agency of a van or bus dedicated to shuttling employees from their residences to a suburban workplace;
- Facilitating public transportation services to suburban employment opportunities.

JARC has changed from a discretionary/competitive program to a formula program, but definitions of eligible projects are unchanged from TEA-21. The Conference Report accompanying SAFETEA-LU includes the following language: "The conferees expect FTA to continue its practice of providing maximum flexibility to job access projects that are designed to meet the needs of individuals who are not effectively served by public transportation, consistent with the use of funds described in the Federal Register, Volume 67 (April 8, 2002)."

6. What Federal requirements apply to the program?

Section 5307 requirements apply. Labor protective arrangements must be certified.

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7. Will there be an opportunity for public comment while FTA is forming the program?

Yes. FTA will solicit public input as it develops guidance for the JARC program. There will also be a notice and comment period in the spring of 2006, during which individuals and organizations may comment on FTA's proposed circular.

8. How are JARC-funded services required to be coordinated with other human services transportation programs?

All projects funded through the New Freedom program, JARC, and the Elderly Individuals and Individuals with Disabilities program must be derived from a coordinated plan. For more information on coordinated planning, see FTA's "Frequently Asked Questions: Coordinated Human Services Transportation Planning Provisions."

9. Will FTA be publishing New Freedom and JARC amounts in the Federal Register for all the small urbanized areas in each State as well as for the urbanized areas over 200,000 and for rural areas?

FTA will publish the amounts apportioned directly to urbanized areas over 200,000 for the New Freedom and JARC programs in the Federal Register Notice of apportionments and allocations for FY 2006. FTA will publish the total amount apportioned to each State for urbanized areas smaller than 200,000 and the total amount for rural areas. Each State will allocate funds for projects in these areas based on a competitive selection process. Solely for informational purposes, FTA posted on its website the amounts attributable to each small urbanized area based on formula factors, but in the Federal Register Notice of Apportionments FTA will publish the total amount apportioned to the State for all small urbanized areas.

10. When will FTA have JARC program guidance available?

FTA is working to develop guidance for the JARC program by the end of spring in 2006. However, interim guidance for the administration of the program in FY 2006 was published in a Federal Register notice. FTA is now seeking input from stakeholders to develop the public transit-human services transportation plans that will be required prior to receiving funds in FY 2007. The guidance will be put out for public review and comment before being finalized.

11. What happens to urban areas over 200,000 that may not use their JARC funding but do not have a roll-over provision?

Funds cannot be transferred simply to augment the urbanized or non-urbanized formula program. The purpose of this restriction is to ensure that all JARC funds are used for the intended purpose: to assist low-income individuals with access to jobs, while streamlining grant administration.

The designated recipient in a large urbanized area under Section 5307 is responsible, in cooperation with the MPO, for soliciting applications in a competitive selection process. Projects selected must be derived from a coordinated plan. The statutory provision that funds be apportioned directly to large urbanized areas assumes that there is a need for job access

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projects in every such area, but does not require that the transit authority provide all JARC services. Eligible sub-recipients include State and local governmental authorities, nonprofit organizations, and operators of public transportation services. The locally developed plan will identify service gaps and a strategy for meeting the needs. The transfer provisions in JARC allow the transfer of the funds by the State to 5307 or 5311, but only for the purpose of eligible selected JARC projects.

12. Does SAFETEA-LU make ADA vehicles under JARC and New Freedom eligible for the 83 percent Federal participation ratio?

Yes. Because JARC and New Freedom are now part of Chapter 53 of Title 49, the provisions of Section 5323(i) apply to these programs. Because JARC was established outside Chapter 53 of Title 49 under TEA-21 and not codified in Chapter 53 until SAFETEA-LU, Section 5323(i) did not previously apply to JARC. Further, in TEA-21 all JARC grants (both capital and operating) had a 50 percent Federal share.

In SAFETEA-LU, Section 5323(i) was amended to include ADA and Clean Fuel related facilities, not just equipment, as eligible for 90 percent Federal funding. The higher share applies only to the incremental costs related to ADA or to Clean Air Act (CAA) compliance, not to the entire piece of equipment or facility. For administrative convenience, FTA calculated a "blended" share of 83 percent for a bus meeting ADA or CAA requirements (counting 90 percent for the portion attributable to these requirements). FTA expects that a bus facility that has a portion devoted to meeting Clean Fuel requirements would have that portion of the facility funded at 90 percent, with the remainder funded at 80 percent. FTA does not expect to establish a blended share for ADA or Clean Fuel facilities, since those projects are likely to be so varied that a single blended share would not be appropriate.

13. Now that the JARC program is formularized, can you explain why Section 5307 small urbanized areas have to apply to the State for these funds instead of applying for them directly as they currently do?

Under SAFETEA-LU, the State is responsible for soliciting applications and selecting projects derived from locally developed, coordinated public transit-human services transportation plans ("coordinated plans"). Once projects have been selected, however, funds can be transferred to the Section 5307 program so that small urbanized areas can apply directly to FTA for the grant, rather than receiving funds as a sub-recipient of the State.

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APPENDIX B

Frequently Asked Questions: New Freedom Program

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FREQUENTLY ASKED QUESTIONS
New Freedom Program Provisions of SAFETEA-LU

1. What is the purpose of the New Freedom Program?

The purpose of the New Freedom Program is to provide improved public transportation services, and alternatives to public transportation, for people with disabilities, beyond those required by the Americans with Disabilities Act of 1990 (ADA). The program will provide additional tools to overcome barriers facing Americans with disabilities who want to participate fully in society.

2. What level of funding is available for the program?

A total of $339 million is available for the program from FY 2006 to FY 2009, starting at $78 million in FY 2006 and rising to $92.5 million in FY 2009.

3. How are funds allocated?

Funds are formula apportioned based on the population of persons with disabilities. On a national basis, 60 percent of the funds go to designated recipients in urbanized areas over 200,000 in population; 20 percent go to States for urbanized areas between 50,000 and 200,000, and 20 percent go to States for non-urbanized areas.

Fund recipients must solicit applications and make competitive selections based on requirements established by the recipient that are consistent with Federal eligibility.

States may transfer funds to FTA's urbanized or non-urbanized area programs so long as funds are used for eligible projects selected under the New Freedom Program. This transfer provision aims to ease the administrative burden for grantees that may get funding under another FTA program by allowing them to submit one grant application for both programs. The transfer provision also relieves State departments of transportation from oversight of small urbanized areas.

States that transfer funds to Section 5307 (Urbanized Area Formula Grant program) must certify that New Freedom projects have been coordinated with nonprofit providers.

4. How may funds be used?

Funds may be used for capital expenses with Federal funds provided for up to 80 percent of the cost of the project, or operating expenses with Federal funds provided for up to 50 percent of the cost of the project.

All projects funded must be derived from a locally developed, coordinated public transit-human services transportation plan (a "coordinated plan").

The coordinated plan must be developed through a process that includes representatives of public, private, and nonprofit transportation and human service providers and participation from the public.

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There is no limit on the level of funds that can be used for operating expenses.

A designated recipient or State may use up to ten percent of the funds made available under the New Freedom program for planning, administration and technical assistance.

The match for FTA funds can come from Federal sources outside of the Department of Transportation that allow their funds to be used for transportation, such as the Department of Health and Human Services.

5. What types of projects may be funded under the program?

The program funds public transportation services and alternatives, beyond those required by the ADA, that assist individuals with disabilities. Conference Report language gives examples of projects and activities that might be funded under the program. These include, but are not limited to:

- Purchasing vehicles and supporting accessible taxi, ride-sharing, and vanpooling programs.
- Providing paratransit services beyond minimum requirements (3/4 mile to either side of a fixed route), including for routes that run seasonally.
- Making accessibility improvements to transit and intermodal stations not designated as key stations.[1]
- Supporting voucher programs for transportation services offered by human service providers.
- Supporting volunteer driver and aide programs.
- Supporting mobility management and coordination programs among public transportation providers and other human service agencies that provide transportation.

6. What Federal requirements apply to the program?

The requirements of Section 5310 (Formula Grants for Special Needs of Elderly Individuals and Individuals with Disabilities) apply, to the extent that the Secretary of Transportation deems appropriate.

7. How does FTA define "beyond the ADA"?

The ADA and the U.S. Department of Transportation implementing regulations (49 CFR Parts 27, 37 & 38) contain specific requirements for making transportation systems and services accessible to persons with disabilities. The New Freedom program is intended to fund transportation services that are outside of those already required for individuals with disabilities under the ADA. FTA is interested in public comment on how best to provide guidance while maintaining flexibility.

[1] NOTE: The ADA requires that any alterations or renovations to an existing facility must be accessible, whether it is a key station or not. See 49 CFR 37.43. FTA seeks comment on how to define accessibility improvements that would be beyond the scope of the ADA for purposes of the New Freedom Program.

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8. How are New Freedom-funded services required to be coordinated with other human services transportation programs?

All projects funded through the New Freedom program, the Job Access and Reverse Commute program, and the Elderly Individuals and Individuals with Disabilities program must be derived from a coordinated plan. For more information on coordinated plans, see FTA's "Frequently Asked Questions: Coordinated Human Services Transportation Planning Provisions of SAFETEA-LU."

9. Will FTA be publishing amounts in the Federal Register for specific small urbanized areas?

When FTA issues the Federal Register Notice of apportionments and allocations for FY 2006, it will publish the total amounts apportioned to each state for urbanized areas smaller than 200,000 and for rural areas. These funds are not entitlements to individual localities. Each State will allocate the funds for projects in these areas based on a competitive selection process using criteria established by the State that are consistent with program objectives and Federal requirements. For information purposes only, the SAFETEA-LU tables posted on FTA's website include amounts attributable to each small urbanized area based on the formula factors. In the Federal Register Notice of apportionments, however, FTA will publish only the total amount apportioned to the State for all small urbanized and rural areas.

10. When will FTA issue guidance regarding the New Freedom program?

FTA is currently soliciting input and comments from the public on implementation strategies for the New Freedom Program. Once this process is complete a circular will be developed that outlines the guidelines for the program. The proposed circular will be open for public comment before it is finalized.

In addition, FTA published a Federal Register Notice on November 30, 2005 that includes interim guidance for implementing the program in FY 2006. FTA is soliciting public comment on this notice.

11. Will the public have opportunities for comment during the development of the New Freedom program?

FTA is conducting several listening sessions with stakeholders to gather input. In addition, FTA is collecting public comment on the Federal Register Notice published November 30, 2005. Finally, FTA will release a draft circular for public comment, and review all comments before issuing a final circular.

12. Is the formula used to apportion New Freedom funds strictly based on the population of persons with disabilities, or will it also consider the elderly population, which has many of the same mobility needs?

The New Freedom formula is based on the ratio of individuals with disabilities in an area to the total population of individuals with disabilities in the corresponding category (non urbanized, urbanized area less than 200,000 in population and urbanized area greater than 200,000 in

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population.) The census data used for individuals with disabilities includes elderly individuals with disabilities.

13. What level of matching funds will be required under the New Freedom program?

New Freedom funds can fund 80 percent of capital expenses, 50 percent of operating expenses, and 100 percent of the up to 10 percent of the apportionment available for administration, planning, and technical assistance. The remainder of the net project costs can come from other non-Department of Transportation Federal funds eligible for transportation projects, as well as local contributions and contract revenue.

14. Will projects funded by the New Freedom program be required to comply with the Americans with Disabilities Act?

Yes, projects funded must be in compliance with the ADA.

15. Will the ADA definition of "disability" apply to the New Freedom program?

The ADA uses a functional definition of "disability;" it refers to any physical or mental impairment that substantially limits one or more of an individual's major life activities, such as performing manual tasks, seeing, hearing, speaking, breathing, learning, and working. It is not based on specific medical diagnoses; any condition that meets these criteria is a disability.

FTA is interested in public comment, however, on whether New Freedom Program funding may be used to fund activities such as paratransit service provided to individuals with disabilities who do not meet the eligibility criteria found in 49 CFR 37.123.

16. Is the New Freedom program primarily a work related program?

According to the Conference Report, the New Freedom program is intended to address barriers facing Americans with disabilities, who seek integration into the workforce and full participation in society. Hence, the New Freedom program includes but is not limited to work-related transportation.

17. How will FTA ensure consistency in the interpretation of ADA requirements?

FTA will ensure consistent interpretation of and compliance with ADA requirements just as it does with all Federal requirements. FTA's two major oversight mechanisms are: the Triennial Reviews of grantees receiving Section 5307 Urbanized Area Formula Grants; and State Management Reviews of grantees receiving FTA funds for State-managed programs. In addition to these oversight reviews, FTA conducts oversight reviews in specific areas when the grantee is either participating in a special program or is at-risk or out of compliance in a specific area (including civil rights).

FTA is also represented on the Department's Disability Law Coordinating Council (DLCC), a mechanism established by the Secretary to ensure consistency throughout the Department in interpretations and guidance involving the ADA and other disability-related statutes and regulations.

FINAL DRAFT

18. Suppose an area wants to work with a local cab company to get accessible cabs (i.e., "beyond" ADA). Can these vehicles then also be used as part of the basic complementary paratransit service, or are they restricted to "beyond"?

As long as the primary purpose of the New Freedom program grant is to develop more accessible taxicab service within a locality to meet a variety of transportation needs for persons with disabilities, vehicles may be used incidentally to integrate ADA-complementary paratransit trips within conventional taxi services. However, vehicles may not be used primarily to meet ADA-complementary paratransit needs.

19. Can New Freedom money be used to update or renovate the transit system's or a contractor's facilities to make them more accessible for current or potential employees with disabilities?

No. The New Freedom Program is intended (49 U.S.C. 5317(b)(1)) to provide "new public transportation services and public transportation alternatives" that assist persons with disabilities with transportation. Improvements to agency facilities for the benefit of agency employees do not meet this definition.

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APPENDIX C

Self-Assessment Tool for Communities

FINAL DRAFT

A FRAMEWORK FOR ACTION

BUILDING THE FULLY COORDINATED TRANSPORTATION SYSTEM

A Self Assessment Tool for Communities

A SELF ASSESSMENT TOOL FOR COMMUNITIES

Section 1: Making Things Happen by Working Together

Driving Factor Individuals and organizations are catalysts for envisioning, organizing, and sustaining a coordinated system that provides mobility and access to transportation for all.

1 Have leaders and organizations defined the need for change and articulated a new vision for the delivery of coordinated transportation services?

Decision Helpers

- Leaders in human services agencies and public transportation have acknowledged that the existing network of transportation services is not yet sufficiently efficient, cost effective, or flexible enough to meet the mobility needs of people in the community or region.
- A clear and inspiring vision statement for improved service and resource management through coordination is supported by all partners and is regularly revisited to ensure its vitality.
- The vision drives planning and action.

> **Using Decision Helpers**
> Circle statements that apply to your situation to help determine your progress. The more positive statements that you can identify describing your system will indicate that a higher rating is appropriate.

Progress Rating

Circle one rating that best describes your program

2 Is a governing framework in place that brings together providers, agencies, and consumers? Are there clear guidelines that all embrace?

Decision Helpers

- A shared decision-making body such as a coalition, lead agency, advisory board, and/or working group is taking a leadership role.
- The shared decision-making body includes public and private transportation providers, non-profit human services agencies, health providers, employment providers, and consumers.
- Those at the table are clear about and comfortable with the decision-making process, whether it is based on consensus or majority rule.
- Roles and responsibilities are outlined in a formal, written agreement.
- The shared decision-making group communicates effectively with those not at the table.
- The group meets regularly, establishes strategic and measurable goals and objectives, follows a work plan, and regularly evaluates its progress and performance.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

3 Does the governing framework cover the entire community and maintain strong relationships with neighboring communities and state agencies?

Decision Helpers

- The shared decision-making body covers an appropriate area, such as a region, and maintains collaborative working relationships with neighboring areas and with human service and state transportation agencies.
- The relationships are used to address service issues such as ensuring transportation services can cross jurisdictional boundaries, customers have access to easy transfer points, and that service is provided to individuals where transportation gaps exist or when people are too frail to use public transportation.
- The relationships are also used to work on policy and financial issues to create a framework that enhances coordination.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

4 Is there sustained support for coordinated transportation planning among elected officials, agency administrators, and other community leaders?

Decision Helpers

- The shared decision-making body has sustained support for coordination by calculating and communicating the specific benefits to community stakeholders.
- Elected officials, agency administrators, and community leaders have been active in coordinated transportation services planning.
- It is widely recognized and accepted that transportation must be integrated into community initiatives related to aging, disability, job training, health care, and services to low-income persons.
- Community leaders provide sufficient staff and budget and provide leadership on policy initiatives to support coordination efforts.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

5 Is there positive momentum? Is there growing interest and commitment to coordinating human service transportation trips and maximizing resources?

Decision Helpers

- Participation in and budget support for coordination initiatives are regularly increasing.
- Agencies are actively working together to ensure that service information, routes, and vehicles are coordinated; funding deployment is coordinated; and policies allow for better resource management and increased ridership.
- Momentum has been maintained even through difficult events such as budget crises and changes in leadership.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

EVALUATION

Section 1

Evaluation: After reviewing each of the questions and assessing our progress, my overall evaluation of how well we are doing in the area of *Making Things Happen by Working Together* is:

Needs to Begin Needs Significant Action Needs Action Done Well

Notes: _____

A SELF ASSESSMENT TOOL FOR COMMUNITIES

Section 2: Taking Stock of Community Needs and Moving Forward

Driving Factor

A completed and regularly updated community transportation assessment process identifies assets, expenditures, services provided, duplication of services, specific mobility needs of the various target populations, and opportunities for improvement. It assesses the capacity of human service agencies to coordinate transportation services. The assessment process is used for planning and action.

6 Is there an inventory of community transportation resources and programs that fund transportation services?

Decision Helpers

- All entities in the region that buy, sell, or use transportation services have been identified.
- The inventory encompasses public transit systems, community non-profits, churches, schools, and private providers such as taxis.
- Transportation services provided by different federally funded programs such as Meals on Wheels, Medicaid, Head Start, Vocational Rehab Services, Independent Living Programs, employment services, and other programs have been identified and their scope of services catalogued.

Progress Rating

Circle one rating that best describes your program

Needs to Begin

Needs Significant Action

Needs Action

Done Well

7 Is there a process for identifying duplication of services, underused assets, and service gaps?

Decision Helpers

- All entities providing transportation service in the region have been surveyed and information has been collected on geographic areas serviced, spending for transportation, types and number of trips provided, hours of operation, cost per trip, sources of funds, number and types of vehicles, number of trips per day/hour, and type of maintenance.
- Agencies providing travel training and eligibility assessments have been identified.
- The data has been analyzed to assess service duplication, underutilized assets, and inefficient service delivery.
- The data and the analysis have been shared with the decision–making body, community leaders, and others to drive and enhance coordination efforts.
- The data is regularly updated to ensure its ongoing value.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

8 Are the specific transportation needs of various target populations well documented?

Decision Helpers

- Information and data that outlines the needs and expectations of individuals with disabilities, older adults, youth, job seekers and persons with low-incomes has been collected.
- Non-users of transit have been asked through surveys, focus groups, or similar means to identify what characteristics would make transit an attractive choice.
- Major health and human service agencies have been asked through surveys, focus groups, or similar means to articulate what would motivate their clients to ride public transit.
- The data has been analyzed and used by the shared decision-making body to drive the coordination planning process.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

9 Has the use of technology in the transportation system been assessed to determine whether investment in transportation technology may improve services and/or reduce costs?

Decision Helpers

- The current use of transportation technology by transportation providers, service agencies, and advocacy groups for scheduling, dispatching, reservations, billing, and reporting has been assessed.
- Research has been conducted on ways in which investments in transportation technology can improve services and/or reduce costs.
- The survey and research data has guided decision making about adopting new technologies.
- The local provider is investigating ways, such as pooled acquisition, to help transportation providers, service agencies, and advocacy groups acquire transportation services technology.
- Ongoing discussions about using technology for coordinated transportation are conducted among providers and client agencies through list serves, face-to-face forums, and other means.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

10 Are transportation line items included in the annual budgets for all human service programs that provide transportation services?

Decision Helpers

- Each human services agency participating in transportation coordination has listed transportation costs as a separate item in its budget to facilitate a strategic planning process for transportation services.
- These agencies have completed an analysis of how improved coordination can extend their current transportation resources and/or reduce the amount of funds spent on transportation.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

11 Have transportation users and other stakeholders participated in the community transportation assessment process?

Decision Helpers

- Stakeholder groups throughout the community have been systematically included in the assessment process through meetings, surveys, focus groups, and other means.
- Customers representing people with disabilities, older adults, and low-income populations serve on work groups and are actively engaged in the assessment and planning process.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

12 Is there a strategic plan with a clear mission and goals? Are the assessment results used to develop a set of realistic actions that improve coordination?

Decision Helpers

- A regularly updated strategic plan or similar document has tangible goals and objectives, timelines, and methods for measuring performance and evaluating benefits.
- The mission and program goals are sufficiently long-range, comprehensive, and compelling to transcend changes in leadership or circumstances, conflicts over power and control of resources, and competing goals or personalities.
- Priorities for coordinating transportation services and a strategic action plan for achieving them were developed through open and informed discussions among all stakeholders.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

13 Is clear data systematically gathered on core performance issues such as cost per delivered trip, rider ship, and on-time performance? Is the data systematically analyzed to determine how costs can be lowered and performance improved?

Decision Helpers

- Operations planning and service planning are priorities in our system.
- Data in core performance areas is collected, disseminated, and analyzed.
- In addition to typical reviews, there are efforts to lower costs and improve performance through exploring new and creative means to provide services.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

14 Is the plan for human services transportation coordination linked to and supported by other state and local plans such as the Regional Transportation Plan or State Transportation Improvement Plan?

Decision Helpers

- Human service agency representatives participate in transportation planning together with metropolitan or rural planning organizations, taking full advantage of their resources and coordination expertise.
- The cross-participation has created a set of mutually supportive and linked plans that actively strengthen coordination efforts.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

15 Is data being collected on the benefits of coordination? Are the results communicated strategically?

Decision Helpers

- To maintain support for transportation coordination, the benefits of coordination are routinely documented and communicated to community leaders and the public.
- The number of individuals that receive transportation services, the types of services they receive, and the costs associated with those services are all tracked.
- There is also a focus on collecting information on the economic and quality of life benefits of connecting people to jobs, health care, education, training, and social support networks.
- The results are regularly published and disseminated for community members, elected officials, and agency leadership.
- Presentations are made throughout the year at local committee meetings to help agencies and organizations recognize the needs and the opportunities for coordinated transportation services.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

EVALUATION

Section 2

Evaluation: After reviewing each of the questions and assessing our progress, my overall evaluation of how well we are doing in the area of *Taking Stock of Community Needs and Moving Forward* is:

Needs to Begin Needs Significant Action Needs Action Done Well

Notes: _____

Section 3: Putting Customers First

Driving Factor Customers, including people with disabilities, older adults, and low-income riders, have a convenient and accessible means of accessing information about transportation services. They are regularly engaged in the evaluation of services and identification of needs.

16 Does the transportation system have an array of user-friendly and accessible information sources?

Decision Helpers

- Information about transportation services and options is easy to obtain in the community.
- There is a "one-stop" resource such as a toll-free number or a Web site where consumers can obtain information about service and schedules and make reservations regardless of provider.
- There are "mobility managers" within human service agencies who advise their clients about transportation options.
- Information is accessible and can be obtained in electronic, Braille, or large-print formats.
- Customer representatives are available to assist first time users or people needing extra help.
- The system is designed for the general public as well as for people with special needs and clients of human service agencies.
- Technology is used effectively to enable and support information systems.

Progress Rating

Circle one rating that best describes your program

17 Are travel training and consumer education programs available on an ongoing basis?

Decision Helpers

- Persons with disabilities and others can avail themselves of travel training programs to learn how to safely ride public transportation.
- There are transitional programs for older adults and others that help individuals recognize and feel comfortable with alternative transportation options if and when they are not able to drive a car.
- Consumer education programs are available to help new or potential riders learn how to use the system, including learning how to read a schedule, how to identify the bus number, how to pay the fare, where to wait for the bus, and other key skills.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

18 Is there a seamless payment system that supports user-friendly services and promotes customer choice of the most cost-effective service?

Decision Helpers

- Regardless of the funding source for each particular trip, the customer or client uses the same payment mechanism each time.
- If there is a fixed route system, a transit pass has been implemented to encourage riders to choose lower-cost fixed route services. The billing process is transparent to the consumer.
- The seamless payment system enables customers to choose appropriate cost-effective transportation services.
- These payment systems may include universal payment cards, fare cards, and similar mechanisms.
- Up-to-date technology is being used to support and manage this system.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

19 Are customer ideas and concerns gathered at each step of the coordination process? Is customer satisfaction data collected regularly?

Decision Helpers

- Customer input was gathered during the planning and needs assessment process through town meetings, surveys, focus groups, or similar means.
- Consumer representatives are active members of advisory and other work groups. In addition, a customer service-monitoring program provides information for a yearly "report card" or similar status report.
- Customers are encouraged to submit suggestions, complaints, and compliments. Actions are taken on complaints within 24 hours of receiving them.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

20 Are marketing and communications programs used to build awareness and encourage greater use of the services?

Decision Helpers

- There are active marketing and communications programs that promote the ease and accessibility of coordinated transportation services.
- The programs use an array of media such as direct marketing, public service announcements, advertisements in local newspapers, and articles and notices in newsletters of various community organizations.
- Information is also disseminated through human service agencies, employment specialists, health care providers, and civic organizations and churches.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

EVALUATION

Section 3

Evaluation: After reviewing each of the questions and assessing our progress, my overall evaluation of how well we are doing in the area of *Putting Customers First* is:

Needs to Begin Needs Significant Action Needs Action Done Well

Notes:

A SELF ASSESSMENT TOOL FOR COMMUNITIES

Section 4: Adapting Funding for Greater Mobility

Driving Factor

Innovative accounting procedures are often employed to support transportation services by combining various state, federal, and local funds. This strategy creates customer friendly payment systems while maintaining consistent reporting and accounting procedures across programs.

21 Is there a strategy for systematic tracking of financial data across programs?

Decision Helpers

- Systems have been created to enable the tracking and sharing of financial data across programs.
- Participating agencies have agreed on common measurements and definitions to support the tracking system.
- Up-to-date technology is being used to support and manage this system.

Progress Rating

Circle one rating that best describes your program

22 Is there an automated billing system in place that supports the seamless payment system and other contracting mechanisms?

Decision Helpers

- A technology interface has been implemented that allows transportation providers to track clients from multiple agencies and funding sources and submit both the report and the bill electronically to the appropriate agency.
- The system effectively supports grant monitoring and reporting requirements.

Progress Rating

Circle one rating that best describes your program

EVALUATION

Section 4

Evaluation: After reviewing each of the questions and assessing our progress, my overall evaluation of how well we are doing in the area of *Adapting Funding for Greater Mobility* is:

Needs to Begin

Needs Significant Action

Needs Action

Done Well

Notes:

A SELF ASSESSMENT TOOL FOR COMMUNITIES

Section 5: Moving People Efficiently

Driving Factor Multimodal and multi-provider transportation networks are being created that are seamless for the customer but operationally and organizationally sound for the providers.

23 Has an arrangement among diverse transportation providers been created to offer flexible services that are seamless to customers?

Decision Helpers

- A system to coordinate numerous transportation providers, such as a brokerage, has been established.
- Providers, such as public transit agencies, taxi and other private paratransit operators, school transportation operators, nonprofit faith and community based organizations, and human service non-profit agencies, are systematically engaged and blended with informal transportation providers (recognizing that the most cost effective travel for some may be paying a neighbor for mileage) to create an array of flexible services for the customer.
- The "broker" identifies the most cost effective transportation provider appropriate to the client's needs, schedules the trip, dispatches the services, bills the appropriate funding source, and tracks the utilization and data associated with the trips.

Progress Rating

Circle one rating that best describes your program

24 Are support services coordinated to lower costs and ease management burdens?

Decision Helpers

- Systematic studies have been completed in our communities which have led to the coordination of essential support services for transportation providers.
- These may include joint purchasing and/or leasing of equipment and facilities; shared maintenance facilities; maintaining a single phone number for customers; maintaining a shared internet information system; using a single or coordinated fare mechanism; sustaining coordinated reservation, dispatching, scheduling, and payment systems; or establishing a single entity to provide human service transportation to all participating human service agencies.

Progress Rating

Circle one rating that best describes your program

25 Is there a centralized dispatch system to handle requests for transportation services from agencies and individuals?

Decision Helpers

- Agency case managers and mobility managers find it easy to schedule regular and one-time trips for their clients through a centralized dispatch system or a similar mechanism appropriate to your locale.
- Agency clients and the general public can easily schedule trips using the dispatch system.
- The dispatchers can help agencies and individuals wisely choose from available transportation alternatives.
- There are also mechanisms, such as transit passes, to reduce dependency on individualized services.
- Technology is used to enhance overall dispatch services, including communication with drivers and passengers, scheduling and mapping routes, locating vehicles, and other critical aspects.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

26 Have facilities been located to promote safe, seamless, and cost-effective transportation services?

Decision Helpers

- Location decisions for common destinations such as the offices where clients are served have taken transportation issues into account.
- Services are co-located or near to each other to reduce transportation needs.
- Pickup locations, which can be used by any transportation provider, are safe and accessible.

Progress Rating

Circle one rating that best describes your program

Needs to Begin Needs Significant Action Needs Action Done Well

EVALUATION

Section 5

Evaluation: After reviewing each of the questions and assessing our progress, my overall evaluation of how well we are doing in the area of *Moving People Efficiently* is:

Needs to Begin

Needs Significant Action

Needs Action

Done Well

Notes:

FRAMEWORK FOR ACTION:

OVERALL COMMUNITY SELF-ASSESSMENT

You have completed Step 1 of the Community Self-Assessment. The five sections highlighted in the questionnaire represent the core elements of building a fully coordinated transportation system.

This questionnaire was designed to help you see the big picture of your community's overall progress. Take a moment to review the evaluations you made at the end of each section and make a note of them on this page. By doing so, you will create an at-a-glance summary of your individual assessment that identifies areas where your system is working well and areas that can be improved.

Section 1 Making Things Happen by Working Together

Section 2 Taking Stock of Community Needs and Moving Forward

Section 3 Putting Customers First

Section 4 Adapting Funding for Greater Mobility

Section 5 Moving People Efficiently

Notes: _____

Next Steps

The next step of the assessment process is to share and discuss your evaluations with your partners. A group leader who can guide the next steps of the assessment and action planning process will facilitate the meeting. The goal of the meeting will be to clarify the results of the assessments as a group, establish priorities, and develop an action plan. The next steps will involve implementing the actions and moving you further down the road to a fully coordinated transportation system.

APPENDIX D

Community Self-Assessment Supplement

FINAL DRAFT

FRAMEWORK FOR ACTION: Supplement to Community Self-Assessment

GAPS IN MOBILITY

In addition to the issues considered in the five sections of the Community Self-Assessment, it is important to consider the specific mobility obstacles related to aging, disability, job training, health care, and services to low-income persons.

Please consider the following obstacles (listed by category) to meeting mobility needs:

Coordination

Inter-community trips_____

Inter-agency trips_____

Services

Locations under-served _____

Times of day_____

Days of week_____

Service quality_____

Special needs of the populations that would benefit from the service_____

Purpose of Trips_____

Price/Payment

Cost_____

Customers' Ease of payment_____

Information Resources

Availability of information_____

Format of information_____

Understandability of information_____

Training

For users_____

For operators_____

FINAL DRAFT

FRAMEWORK FOR ACTION: Supplement to Community Self-Assessment

OTHER THOUGHTS, IDEAS, OR COMMENTS

If you have other ideas that don't seem to fit the Community Self-Assessment, please share them in the space below.

FINAL DRAFT

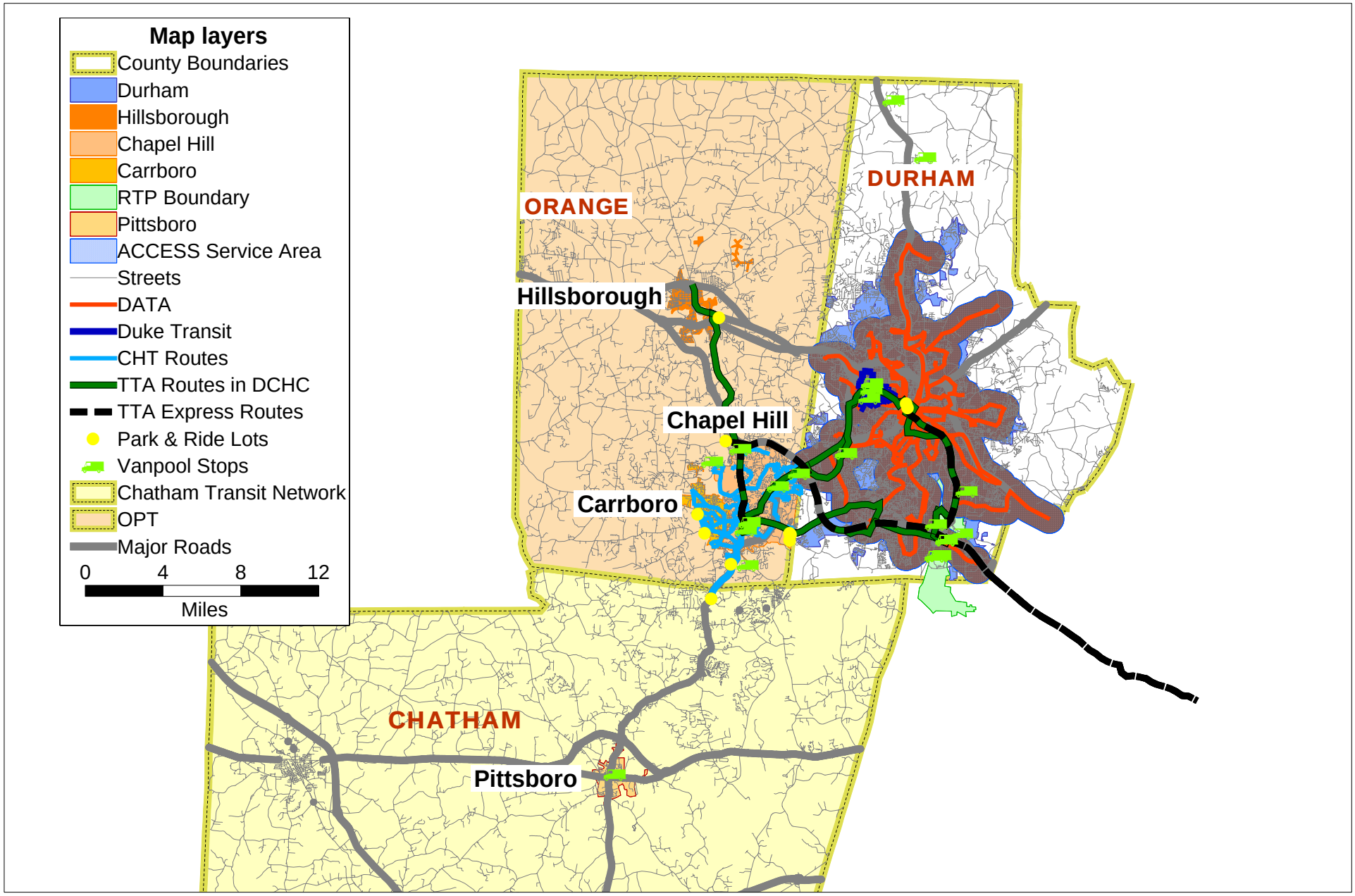
APPENDIX E

Maps of Service Availability by Day of Week and Time of Day

FINAL DRAFT

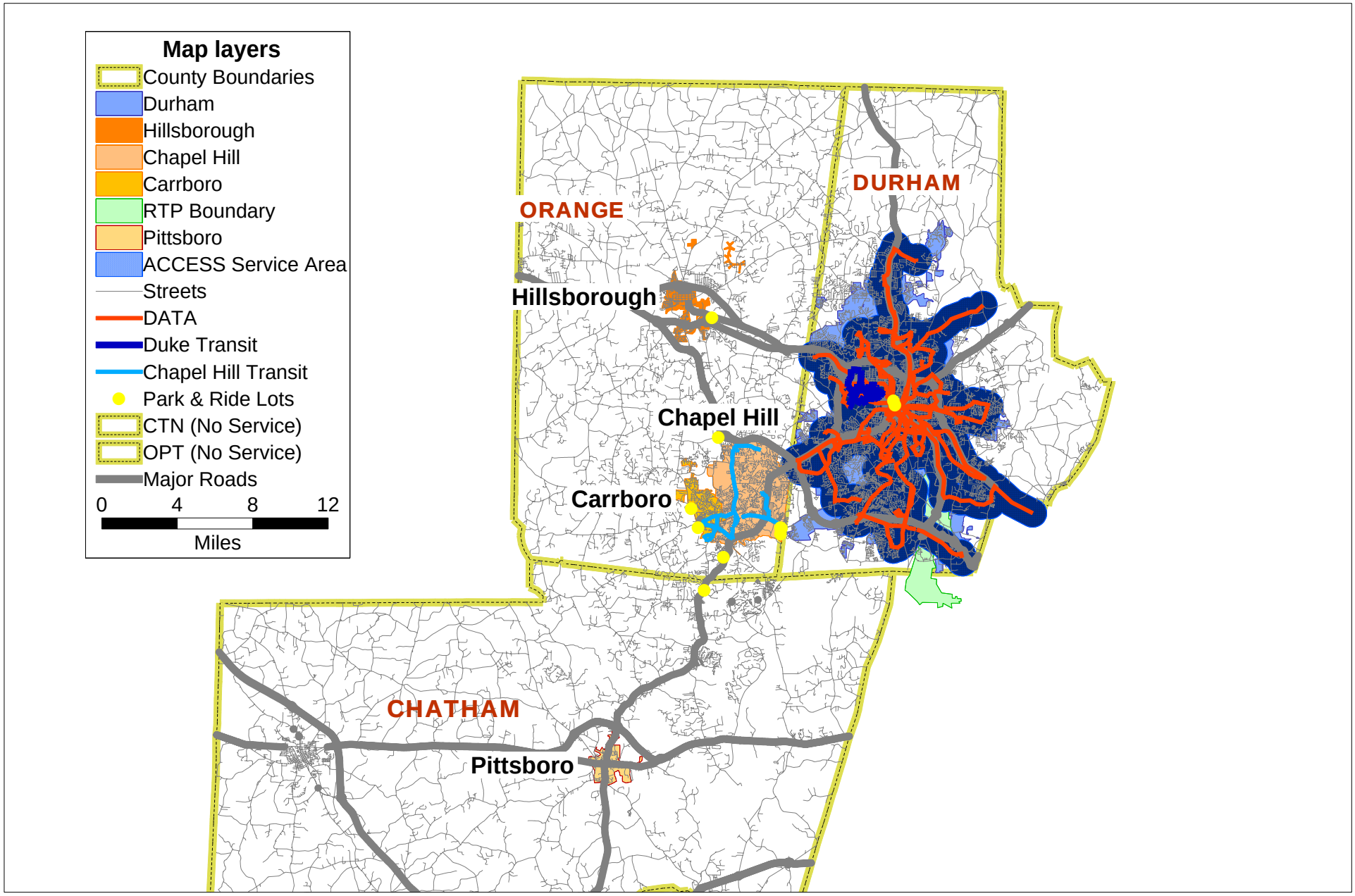
Public and Human Services Transportation

Weekdays (Daytime)



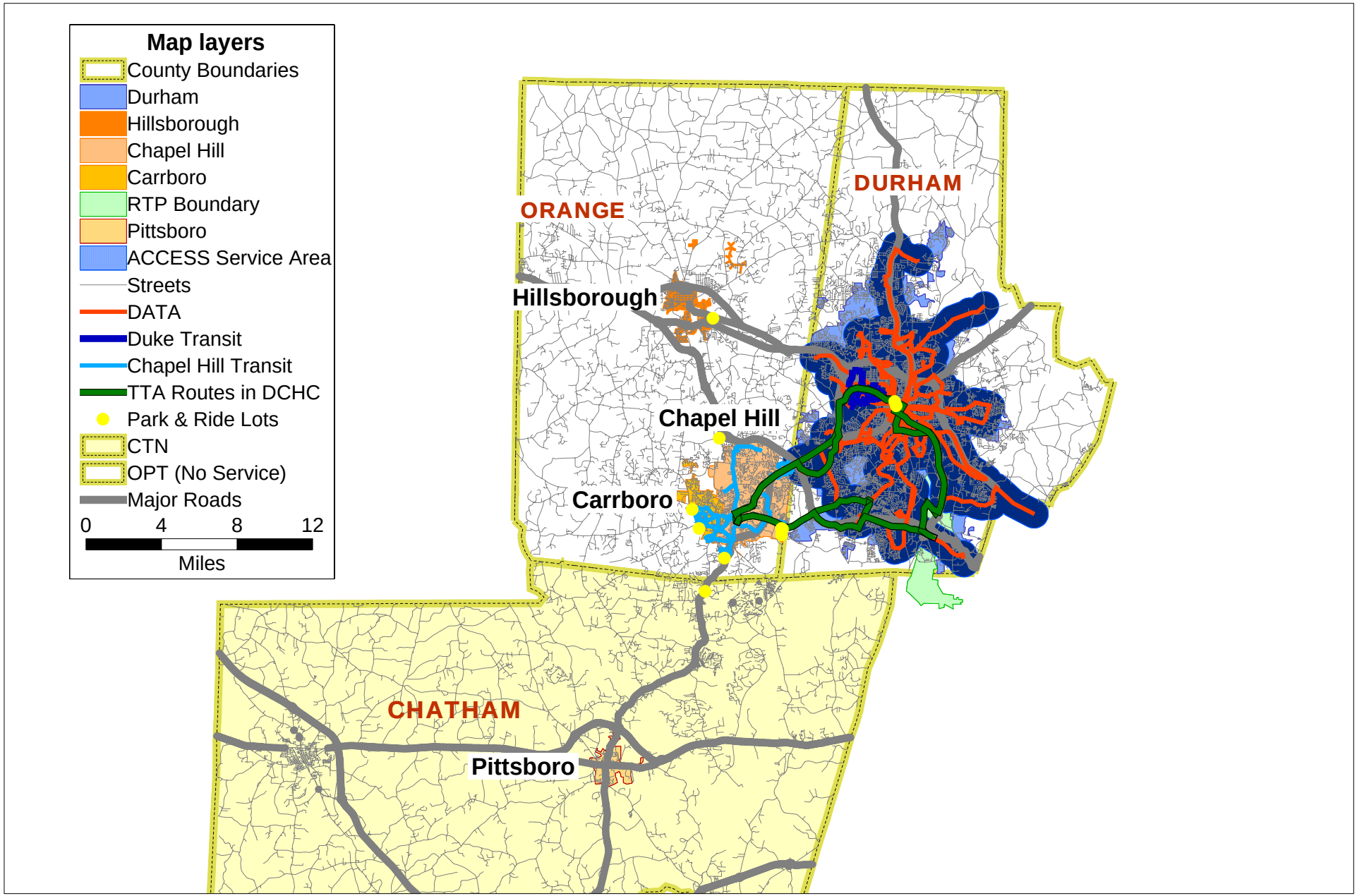
Public and Human Services Transportation

Weekdays (Night 10pm - midnight)



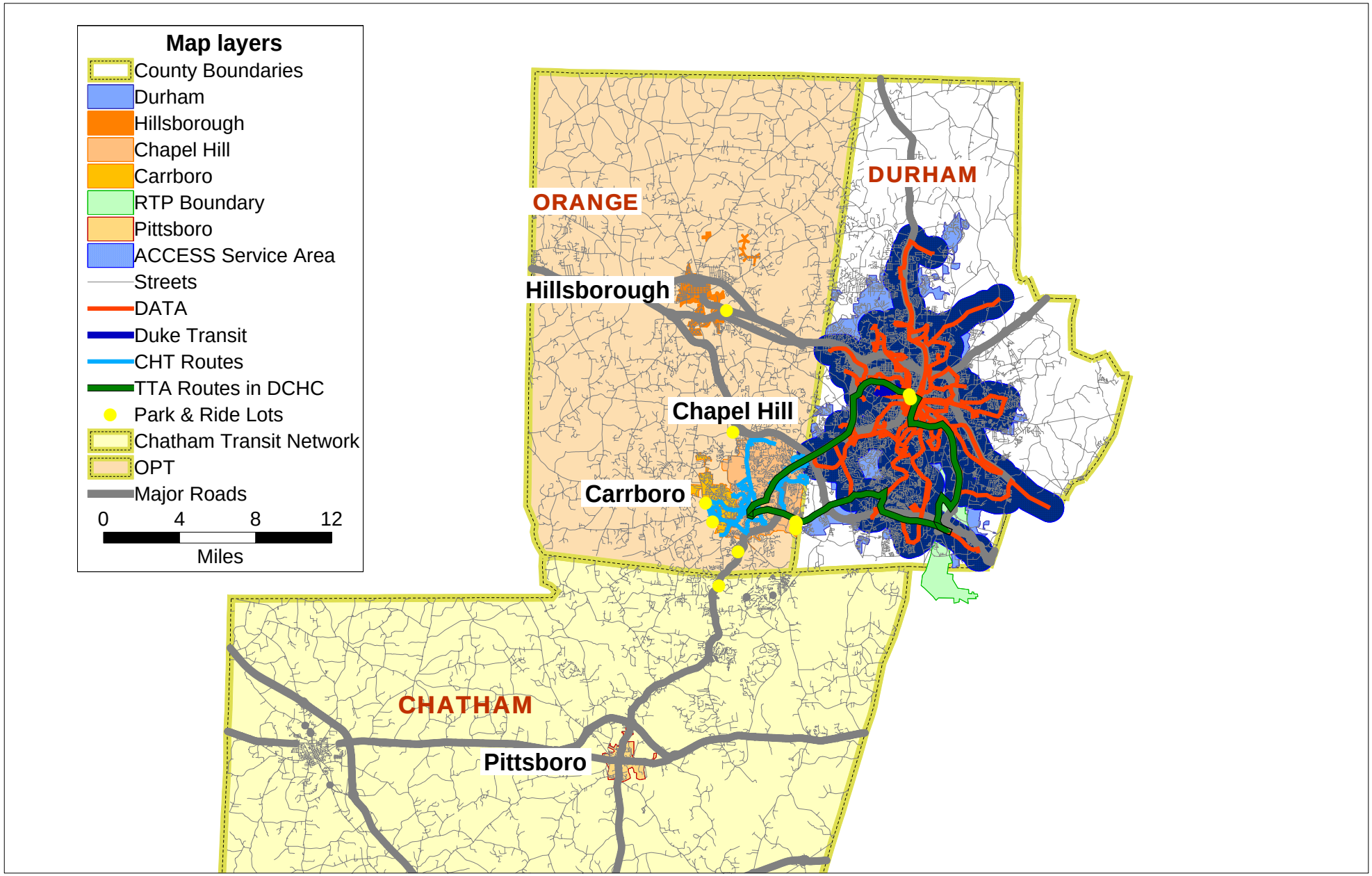
Public and Human Services Transportation

Weekdays (Evening)



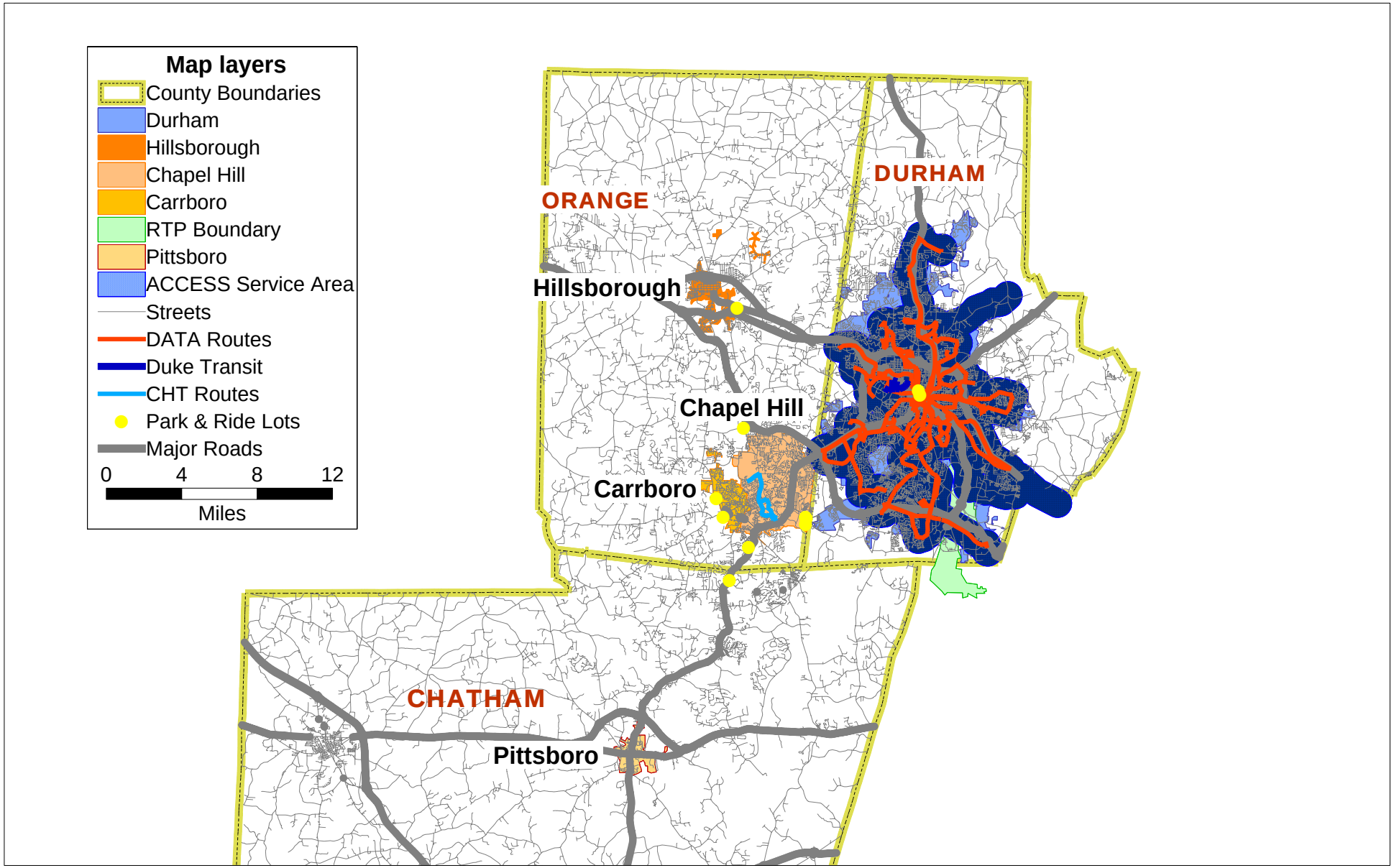
Public and Human Service Transportation

Saturday



Public and Human Service Transportation

Sunday



APPENDIX F

Overview of Eligibility Requirements for ADA Paratransit, Community Transportation Demand-response, and Contract-based Services

FINAL DRAFT

DCHC Coordinated Public Transportation – Human Services Transportation Plan

Overview of Eligibility Requirements

Urban Public Transportation Paratransit Services

Chapel Hill Transit / EZ Rider - EZ Rider is a special service which uses vehicles equipped with lifts to transport individuals with mobility limitations that prevent them from using Chapel Hill Transit's fixed-route bus service. A physician of the patron must complete an EZ Rider Certification Form. The rider must be able to meet the driver at his/her door. No more than four grocery size bags are allowed per trip. For trips scheduled the same days and times each week, subscription service is available for up to 6 months at a time. The Certification Form is available at www.townofchapelhill.org

DATA ACCESS – DATA ACCESS is the ADA paratransit service for the City of Durham. Only riders who meet the criteria specified by the ADA and who have been certified as eligible can use DATA ACCESS. Individuals do not qualify automatically simply because they have a disability or on the basis of age. Eligibility is based on a person's functional limitations. DATA ACCESS provides curb-to-curb transportation service for eligible riders. DATA ACCESS operates service to all locations within the City of Durham and to any location outside the City that is within ¾ mile of a DATA fixed-route. Personal interviews are required and the entire review process generally takes up to 21 days. Notifications of eligibility are mailed**.** ACCESS application is available online http://data.durhamnc.gov.

TTA Paratransit Service -The Triangle Transit Authority's (TTA) paratransit system operates in accordance with the Americans with Disabilities Act and is designed to serve individuals whose disabling conditions or functional limitations prevent them from using TTA fixed route services. The program allows eligible users to ride in TTA lift-equipped vans or designated taxis for trips served by TTA routes 105, 107, 402, 403, 412, 413, and all shuttles. Trips must begin and end within ¾ mile of these fixed routes. Rides need to be reserved at least one day in advance. Service is provided for all types of trips, including medical, shopping, and personal travel. Personal interviews are required and the entire review process is completed within 21 days. Notifications of eligibility are mailed**.** Applications are available online www.ridetta.org

Community Transportation Demand Response/Rural General Public Services

Orange Public Transportation – Provided on a "seats available" basis. Service is available to any resident living within Orange County but outside of the Chapel Hill and Carrboro town limits. Demand response trips must be arranged 24 hours in advance. OPT also offers fixed route and deviated fixed route service to the general public.

Chatham Transit Network – Provided on a "seats available" basis. Service is available to any resident of Chatham County. General public service is available on all routes which can deviate up to 2.5 miles for a general public passenger. Trip reservations should be made 24 hours in advance. Same day service is available in Siler City and Pittsboro.

Durham County ACCESS- Currently all services are by subscription or demand response but plans are in progress to initiate routes to rural portions of Durham County. Currently routes follow DATA ACCESS routes. Demand response trips are provided on a "seats available" basis. Riders must have an expressed needed for transportation, live within Durham City or County and trips have to be arranged by 1pm on the day prior to the planned trip.

Community Transportation Services for Agency Clients

Orange Public Transportation – Contract Community Service agency determines passenger eligibility.

Chatham Transit Network - Contract Community Service agency determines passenger eligibility.

Durham County ACCESS - Contract Community Service agency determines passenger eligibility.

APPENDIX G

Overview of Technologies Available to Improve Coordination of Transportation

FINAL DRAFT

DCHC Coordinated Public Transportation – Human Services Transportation Plan

Overview of Public Transportation Technologies

Automated Voice Annunciation Systems
This technology provides automated audible and visible announcements at key stops.

Chapel Hill Transit – 30 buses have equipment, bus replacements in 2008 will have equipment
DATA– Available on all buses
Triangle Transit Authority (TTA) – Not currently on buses, scheduled for implementation on 26 buses in 2008-2009 and with all vehicle replacements starting in 2009
Paratransit services (Chapel Hill Transit EZ Rider, DATA ACCESS, TTA) – Not currently on vehicles. Not aware of technology implementation on demand-responsive services
Durham County ACCESS – Not available
OPT – Not available
Chatham Transit Network – Not available

Electronic Fare Payment
A regional study in 2002 determined that Triangle ridership was not yet high enough to warrant the costs of a SmartCard fare system. All agencies committed to revisit the issue in the future.

Chapel Hill Transit – Fare free system; all buses have electronic fareboxes/magnet card readers
DATA– Jointly bought electronic validating fareboxes/magnetic card readers with TTA and CAT
TTA – Jointly bought electronic validating fareboxes/magnetic card readers with TTA and CAT
Paratransit services (Chapel Hill Transit EZ Rider, DATA ACCESS, TTA) – Not available
Durham County ACCESS – Not currently on vehicles
OPT – Not currently on vehicles
Chatham Transit Network – Not currently on vehicles

Low-Floor Buses
Chapel Hill Transit – Ordered low-floor buses for delivery in 2008
DATA – Entire fleet is low-floor buses
TTA – Deciding in Spring about bus replacement specifications
Paratransit services (Chapel Hill Transit EZ Rider, DATA ACCESS, TTA) – Low floor is not available in vans
OPT – Does not currently have low-floor vehicles
Chatham Transit Network – Does not currently have low-floor vehicles

Computer-Aided Dispatching Software
This software provides assistance to the dispatcher of demand-responsive services in making schedules for the drivers and pairing trips to be as efficient as possible.

Chapel Hill Transit EZ Rider – uses software made by Strategen
DATA ACCESS – the contractor uses proprietary software
TTA – together with Raleigh, purchasing software made by Trapeze
Durham ACCESS – the contractor uses proprietary software
OPT – not currently using computer-aided dispatching
Chatham Transit Network – not currently using computer-aided dispatching

Automatic Vehicle Location/Mobile Data Terminal (MDTs) System

This technology provides real-time information about a vehicle's location. The location information can be provided to dispatchers and/or to the public.

Chapel Hill Transit – Since September, all vehicles have AVL
DATA – Not currently on buses
TTA – AVL system is on all buses, provided to dispatchers only
Paratransit services (Chapel Hill Transit EZ Rider, DATA ACCESS, TTA) – All use MDT's, but not AVL
OPT – Not currently on buses
Chatham Transit Network – Not currently on buses

Real-Time Passenger Information System

This technology provides predictive information about the arrival times of the next several buses at a particular bus stop. This is typically used for fixed-route services.

Chapel Hill Transit – Available since September

This system is not available on any other systems in the 3-county area.

Surveillance and security systems

These technologies include video surveillance, silent alarms, and covert microphones on vehicles.

Chapel Hill Transit – Has planned to put cameras on buses, but this is unfunded.
DATA – Has a comprehensive surveillance and security system on their buses.
TTA – Has planned to put cameras on buses, but this is unfunded.
Paratransit services (Chapel Hill Transit EZ Rider, DATA ACCESS, TTA) – None use these technologies.
OPT – Not currently on buses
Chatham Transit Network – Not currently on buses

Other Technologies

There are other technologies that are not used by transportation providers in the Triangle, but have been used elsewhere.

Assistive technologies

- GPS-based system that allows caregivers to monitor and assist their clients with cognitive disabilities from a remote location.
- Acoustical "wayfinders" for the visually impaired
- Countertop devices that translate speech to text at ticket counters or information centers
- Talking directory system

Coordination and Integration Software

- Software coordinating demand-responsive routes and schedules among multiple agencies
- Software coordinating service eligibility, fare card usage, and billing among multiple agencies

APPENDIX H

Overview of Prices and Payment Options

FINAL DRAFT

DCHC Coordinated Public Transportation – Human Services Transportation Plan

Overview of Transportation Payment Options

Fixed Route	One-Way Fare	Payment Options	Discounts
CHT	Free	n/a	n/a
DATA	$1.00	cash, fare card	children, elderly, students (17 and under), disabled
TTA	$2.00	cash, fare card	Children, elderly, disabled
OPT	$2.00	cash or check	elderly, disabled, Medicaid

Paratransit Services	Fare	Payment Options	Discounts
CHT/EZ Rider	Free	n/a	n/a
DATA ACCESS	$2.00	cash or check	n/a
TTA Paratransit Service	$4.00	cash, fare card	for Monthly Pass

Rural General Public/ Demand Response	Fare	Payment Options	Discounts
OPT	$12.75	cash or check	elderly, disabled, Medicaid
CTN (in county)	$3.00	cash pre-purchased ticket	family
Durham County ACCESS	$2.00	cash or check	n/a

Subscription Service	Fare	Payment Options	Discounts
OPT	Agency Pays	contract agreement	n/a
CTN	Agency Pays	contract agreement	n/a
Durham County ACCESS	Agency Pays	contract agreement	n/a

Other Services	Fare	Payment Options	Discounts
TTA Express Service	$2.50	cash or fare card	n/a
CHT Shared Ride (evening & weekend)	$14.25 (20 tickets)	cash, check or credit	n/a
Taxicabs			

APPENDIX I

Overview of Public Transportation Information Sources

FINAL DRAFT

DCHC Coordinated Public Transportation – Human Services Transportation Plan

Overview of Public Transportation Information Resources

Print Materials

Print materials are developed independently by each agency. Limited Spanish translations are included in some materials. The information is available in accessible formats upon request.

Chapel Hill Transit – Route Guides published in Fall and Spring
Chapel Hill Transit EZ Rider – Rider's Guide
DATA – Individual route brochures
DATA ACCESS – reference to ACCESS through route brochures
OPT – informational brochures
Chatham Transit Network – Brochures advertising services
Triangle Transit Authority – Individual route brochures, How-to-Ride Guide, brochures on Vanpool, Emergency Ride Home (English and Spanish).
TTA Paratransit – Rider's Guide, Information Brochure

Telephone Assistance

The **GoTriangle regional call center** will begin operations in March 2007. Customer service representatives will be trained to respond to questions for all public transit services, including basic questions about community transportation systems. The phone number will be 549-9999.

Chapel Hill Transit – 968-2769; Spanish Language Line – 969-2070
Chapel Hill Transit EZ Rider – 969-5544 (reservationist); 968-2772 (dispatcher)
DATA – 683-DATA (3282)
DATA/Durham County ACCESS – 688-1525, ext 23
OPT – 245-2008
Chatham Transit Network – 542-5136
Triangle Transit Authority – 549-9999
TTA Paratransit – 485-7468

TDD 1-800-735-2962 / TTY 711

Website Resources

A regional public transportation website, www.GoTriangle.org, provides trip planning, schedule, fare, and policy information for the Triangle's urban public transportation providers.

Chapel Hill Transit and EZ Rider – www.chtransit.org
DATA and DATA ACCESS – data.durhamnc.gov
Durham ACCESS – www.ces.ncsu.edu/durham/communitydevelopment/transportation/transportation.php
OPT – www.co.orange.nc.us/aging/opt/
Chatham Transit Network – www.chathamtransit.org
Triangle Transit Authority – www.rideTTA.org

Other Resources

Public Meetings
Presentations to Interest Groups
Advertisements in newspapers
Self-promotion on exterior of vehicles
Referrals from social service agencies

APPENDIX J

Overview of Other Transportation Planning Activities

FINAL DRAFT

DCHC MPO Coordinated Public Transportation – Human Services Transportation Plan

Overview of Public Transportation Planning Initiatives

There are currently complementary short-, medium- and long-term planning projects underway, which support regional transit planning objectives in the DCHC MPO and within the greater Triangle region. For each project, the agency with ownership of the process and the project manager(s) are identified in parentheses.

MPO Long Range Transportation Plans (LRTP): The LRTP process is the core planning process required by metropolitan areas in se curing federal resources to support local projects for all modes of transportation. LRTPs are updated every three years by the DCHC MPO and the Capital Area MPO and serve as the guide for transportation planning and investment for the Triangle Region. The plans focus on 30-year construction and operations budgeting for all modes of transportation. They also serve as the basis from which to estimate air quality conformance, as required for securing federal funds. Both MPOs prepare a separate LRTP for their planning jurisdiction and plans are formally adopted by the Technical Advisory Committees of the MPOs. The DCHC MPO's jurisdiction includes all of Durham County and portions of Orange and Chatham Counties. The Capital Area MPO's jurisdiction includes all of Wake County and portions of Granville, Franklin, Johnston, and Harnett Counties. **Work is already underway on the next LRTP which must be adopted by June 2009. Public involvement activities will begin this winter.** (Mark Ahrendsen, DCHC MPO; Ed Johnson, Capital Area MPO)

Transit Infrastructure Blueprint: A regional planning project that will focus on bringing the many proposed fixed-guideway corridors in the region to a consistent level of analysis in terms of land use attributes, ridership and cost estimates. The Blueprint will support the transit capital investment portion of the LRTPs for both MPOs, and the schedule for this project is driven by the LRTP process. Contributing sponsors include TJCOG, DCHC MPO, CAMPO, NCDOT, and TTA. **This work is scheduled to be completed in Summer 2007.** (John Hodges-Copple, TJCOG; Barb Weigel, TTA)

Fresh Look at Transit: The Capital Area MPO and the DCHC MPO are initiating this project to set regional major transit investment priorities for the Triangle. The Blueprint will provide the technical data for the project. The MPOs will be forming a committee to advise the TAC on regional priorities and will seek public input. This initiative will complement the transit capital investment portion of the LRTPs for both MPOs. **This work is scheduled to be completed in 2009.** (Mark Ahrendsen, DCHC MPO; Ed Johnson, Capital Area MPO)

Chapel Hill Transit Master Plan: Chapel Hill, Carrboro, and UNC will be developing a long-range transit master plan to set goals for the share of travel demand that will be met with transit services and to guide transit investments in these communities to achieve those goals. In particular, the Plan will focus on the transportation needs of the Carolina North development project that is being planned by the University. The results of this plan will be

incorporated into the analysis for the MPO's 2035 Long Range Transportation Plan. **This work is scheduled to be completed by the end of 2007.** (David Bonk, Town of Chapel Hill)

TDM 7-Year Plan: Assess existing programs in the Triangle that are designed to facilitate travel behavior change, then proposes specific TDM investments for the next 7 years. The results of this work will feed into the Long-Range Transportation Plan for each MPO. **This work is scheduled to be completed in Spring 2007. Stakeholder activities began in November 2006.** (Fleming El-Amin, TTA)

Coordinated Public Transportation / Human Services Transportation Plan: Focuses on identifying unserved transportation needs for individuals with disabilities, older adults, persons with limited incomes, and reverse-commuters. Each MPO will develop a plan as required by FTA under SAFETEA-LU. (Fleming El-Amin/John Tallmadge, TTA on behalf of DCHC MPO; Ed Johnson, CAMPO)

Transportation Provider Short-Range Plans: Each public transportation and community transportation agency typically develops a short-range strategic plan (often with a 5-year horizon) to prioritize changes to services, facilities, equipment, quality, and marketing.

- TTA is in the middle of a Strategic Plan for Bus, Vanpool and Paratransit Investments, called "Defining the TTA Experience," scheduled for completion in March 2007. Public involvement activities began in October. A survey is available online at www.rideTTA.org/experience
- Chapel Hill Transit is planning to begin development of a short-range transit plan in 2007.
- DATA last completed a short-range transit plan in 2002.
- Durham County ACCESS last completed a transportation development plan in 2002. An update to this plan is in progress.
- Orange County completed a Community Transportation Improvement Plan in October 2004.
- Chatham Transit Network completed a transportation development plan in 2002. The next study should be completed in 2007 to be followed by a Regional Transportation Development Plan sponsored by NCDOT.

Seamless Service Initiative: Focuses on better coordination and improving cooperation among existing regional and municipality-based fixed-route and paratransit service providers within the Triangle. The participating agencies are finding opportunities ranging from a regional call center, to common paratransit eligibility, to joint marketing and procurement. (TJCOG coordinating, TTA leading several work groups)

Regional Transportation Development Plan: The RTDP will assess the services and functions of the community transportation programs in Durham, Orange and Wake counties and identify those that can be coordinated and/or consolidated to the greatest extent possible to provide the most efficient, effective and safe community transportation services. (Sanford Cross, TJCOG)

APPENDIX K

JARC/New Freedom Grant Application

FINAL DRAFT

DCHC MPO

DURHAM - CHAPEL HILL - CARRBORO - METROPOLITAN PLANNING ORGANIZATION

FUNDING APPLICATION

Job Access/Reverse Commute (JARC) and New Freedom Programs

Introduction

The Safe, Accountable, Flexible, Efficient Transportation Equity Act (SAFETEA-LU) reauthorized federal transportation funding programs through Federal Fiscal Year (FFY) 2009. SAFETEA-LU promotes more efficient and effective Federal surface transportation programs by focusing on transportation issues of national significance, while giving State and local transportation decision makers more flexibility for solving transportation problems in their communities. SAFETEA-LU continues a strong fundamental core formula program emphasis coupled with targeted investment, featuring Safety, Equity, Innovative Finance, Congestion Relief, Mobility and Productivity, Efficiency, and the Environment.

With the passage of SAFETEA-LU, transportation projects receiving funding under the Job Access/Reverse Commute program or the New Freedom program must be "derived from a locally developed, coordinated public transit - human services transportation plan." Further, the law requires that this plan be "developed through a process that includes representatives of public, private, and nonprofit transportation and human services providers and participation by the public."

This funding application addresses two Federal Transit Administration (FTA) programs funded by SAFETEA-LU: Job Access/Reverse Commute (JARC, Section 5316) and New Freedom (Section 5317).

Background on JARC and New Freedom Funds

The Job Access Reverse Commute grant program is intended to fund "the development and maintenance of transportation services designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to their employment." For the two fiscal years 2005-2006, 2006-2007, the Durham urbanized area, which includes Chapel Hill, has apportionments totaling $55,577. These funds must be put into a grant within three years.

According to FTA, the purpose of the New Freedom Program is to provide improved public transportation services, and alternatives to public transportation, for people with disabilities, beyond those required by the Americans with Disabilities Act of 1990 (ADA). For the two fiscal years 2005-2006, 2006-2007, the Durham urbanized area received apportionments of $71,878. These funds also must be put into a grant within three years.

Eligibility Overview: JARC and New Freedom Funds

Eligible Applicants

JARC and New Freedom is a formula grant program for member jurisdictions in the Durham, Chapel Hill – Carrboro Metropolitan Planning Organization. Applicants may include state or local government authorities; private non-profit organizations; and operators of public transportation services including private operators of public transportation services.

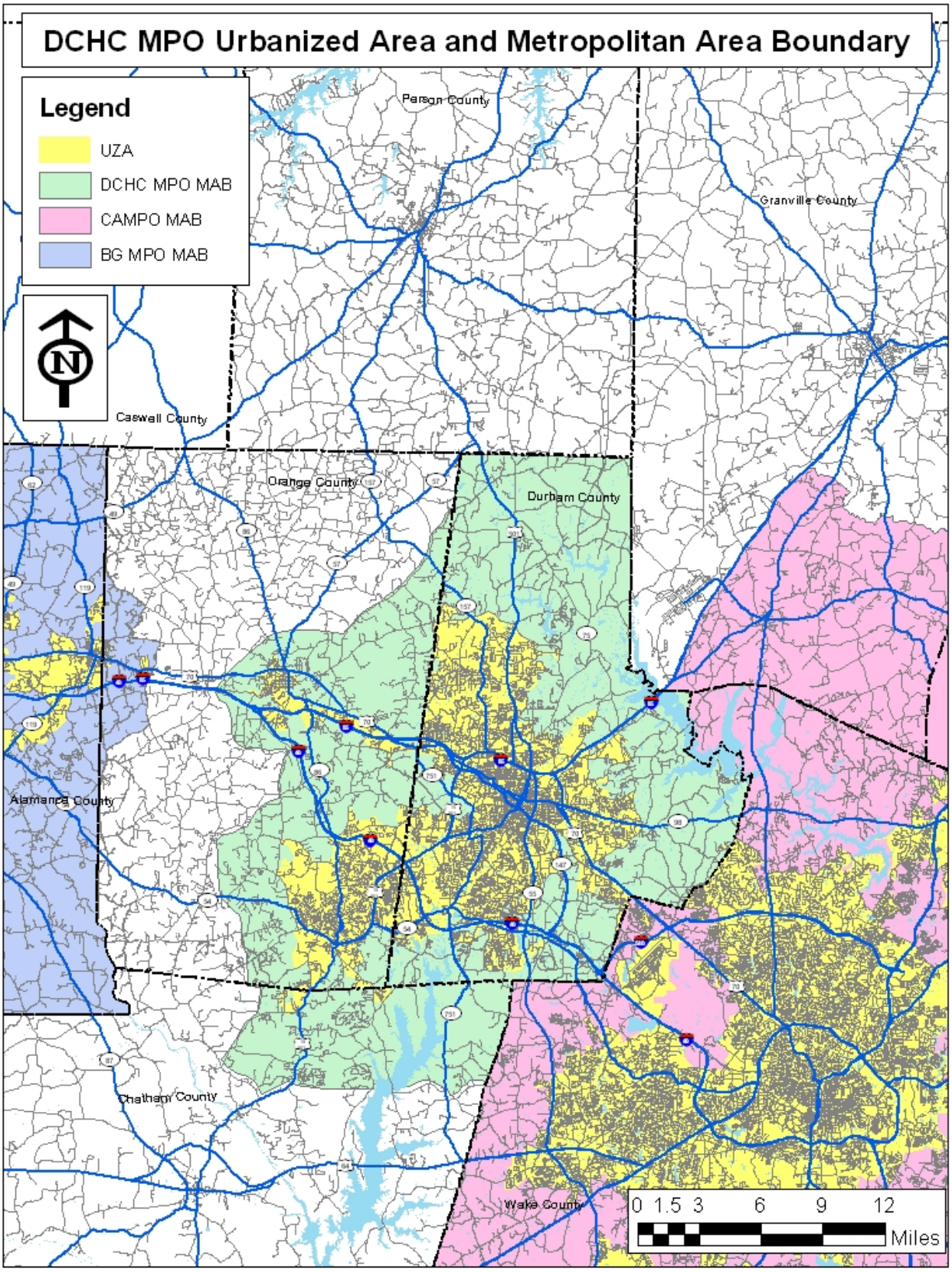
Eligible Use of Program Funds:

JARC and New Freedom program funds are intended to fund innovative and flexible programs that identify the transportation needs of individuals with disabilities, older adults, and individuals with limited incomes. Therefore, it is expected that JARC and New Freedom funds be directed to meet these needs by funding new programs or services, or to continue existing programs.

Eligible Projects:

JARC and New Freedom funds may be used for planning, capital or operating costs of providing access to jobs; or services and facilities that improve mobility for persons with disabilities but not limited to persons who are ADA-certified. Specific project eligibility is detailed later in this document under each program's description. As well, FTA circulars providing guidance on applying for JARC and New Freedom funds can be found at: JARC: http://www.fta.dot.gov/documents/TAD_JARC_8_29_06_Final_tb.doc ; New Freedom: http://www.fta.dot.gov/documents/TAD_New_Freedom_8_30_06_Final_tb.doc

Further, the Durham, Chapel Hill, Carrboro Metropolitan Planning Organization (DCHC-MPO) is soliciting projects that have been derived from the DCHC-MPO's adopted Coordinated Public Transportation - Human Services Transportation Plan (CPT-HSTP). The plan outlines a vision for improving mobility options for the disabled, aging, and low-income population subgroups living in the region. SAFETEA-LU requires that beginning in FFY 2007, projects selected for funding under the JARC and New Freedom programs must be derived from the locally developed CPT-HSTP and address service needs and gaps/barriers. Federal funding of projects through these two programs will be utilized to meet plan goals. Selection criteria will be used to prioritize potential programs and develop a listing of projects. To view the entire CPT- HST Plan, please visit www.gotriangle.org/coordinated_plan.


DCHC MPO Urbanized Area and Metropolitan Area Boundary
Legend
UZA
DCHC MPO MAB
CAMPO MAB
BG MPO MAB
N
Person County
Granville County
Caswell County
Orange County
Durham County
Alamance County
Chatham County
Wake County
0 1.5 3 6 9 12
Miles

DEADLINES FOR APPLICATION SUBMISSION

If your organization has a project that it would like considered for funding under JARC and/or New Freedom please complete the following application and submit it to the address below no later than **Friday, April 27, 2007**. Applications received after that date and time will not be considered. DCHC MPO will accept printed, faxed or electronic applications. DCHC MPO will review and score the applications, and through a process established in its newly adopted Coordinated Public Transportation – Human Services Transportation Plan (CPT-HSTP), will select projects for funding. Applications should be submitted to:

Mr. Felix Nwoko
DCHC MPO
101 City Hall Plaza
Durham, NC 27701

The information in this application is a public record. Applicants should not include information that may be regarded as confidential. The applicant must comply with all necessary Certifications and Assurances if funding is awarded.

Note: For both the JARC and New Freedom programs, the grants are for a one-year period. It will be necessary to reapply though a competitive process each year for funding.

APPLICATION DUE: April 27, 2007

Applicants should use this checklist to ensure that all applicable parts of the application and attachments are completed and submitted.

PART I. FUNDING REQUEST – GRANTS TITLE PAGE

PART II. PROJECT NARRATIVE

Please include the following documents:
(1) Map of Applicant Service Area
(2) Existing and Proposed Transportation Services
(3) Project Needs/Goals and Objectives
(4) Implementation Plan
(5) Coordination and Program Outreach
(6) Program Effectiveness

PART III. PROPOSED PROJECT BUDGET

PROJECT APPLICATION PROCEDURES

This JARC and New Freedom program application is for funds to be used within the DCHC MPO service area. The initial project application consists of the program-specific requirements detailed in this package of forms and instructions. After a project application has been selected for funding, the applicant will be required to submit appropriate background Certifications and Assurances, and other documentation necessary to meet the requirements of the FTA's Urbanized Area Formula Grant Program (Section 5307 program under Title 1, United States Code). Additional FFY 2006 FTA Certifications and Assurances information can be found at: http://www.fta.dot.gov/documents/2006-Certs-Paper.doc

Eligibility Overview: Job Access/Reverse Commuter (JARC)

Eligible agencies:
Private, non-profit organizations; state or local government authorities; and operators of public transportation services, including private operators of public transportation services

Program description:
Section 5316 (Job Access/Reverse Commute or JARC) is a formula program of funding to develop transportation services to transport welfare recipients and low-income persons to and from jobs (Job Access); and to transport residents of urban centers, rural and suburban areas to suburban employment opportunities (Reverse Commute). Job Access grants can be used for capital and operating costs of equipment, facilities, and capital maintenance related to providing access to jobs. Costs to promote transit for workers with nontraditional work schedules, the use of transit vouchers, and the use of employer-provided transportation are also covered. Reverse Commute grants can be used for operating, capital and other costs associated with providing reverse commute service by bus, carpool, vans or other transportation services.

Eligible activities:
Eligible activities for JARC funding include late-night and weekend service, guaranteed ride home service, shuttle service; expanded fixed-route public transit routes; demand-response service; ridesharing and carpooling activities; transit related aspects of bicycling; local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides; marketing promotions for JARC activities; supporting the administration and expenses related to voucher programs; using Geographic Information System (GIS) tools and/or implementing Intelligent Transportation Systems (ITS); integrating automated regional public transit and human service transportation information, scheduling and dispatch functions; deploying vehicle position-monitoring systems; and establishing regional mobility managers or transportation brokerage activities. Further information on eligible activities can be found at: http://www.fta.dot.gov/documents/TAD_JARC_8_29_06_Final_tb.doc

Cost Sharing/Match Requirement:
Funds can be used to support up to 80 percent (80/20 match) for capital projects, and not more than 50 percent (50/50 match) of projects for operating assistance. Fare revenue generated on the service to be supported may not be used as matching funds for operating grants. Non-DOT Federal funds and local and private funds can be used as a match. Matching share requirements are flexible to encourage coordination with other federal programs that may provide transportation, such as Health and Human Services or Medicaid**.**

Eligibility Overview: New Freedom Funds

Eligible agencies:
Private, non-profit organizations; state or local government authorities; and operators of public transportation services, including private operators of public transportation services

Program description:
Section 5317 is a new formula grant program for public or alternative transportation services and facility improvements to address the needs of persons with disabilities that go beyond those required by the Americans with Disabilities Act (ADA). Funds will cover capital and operating costs to these programs to provide that new service.

Eligible activities:
Eligible activities for New Freedom funding include: enhancing public transportation beyond the minimum requirements of the ADA; providing "feeder" services; making accessibility improvements to transit and intermodal stations; providing travel training; purchasing vehicles to support new accessible taxi, ridesharing, and/or vanpooling programs; covering the administration and expenses of new voucher programs for transportation services offered by human service agencies; supporting new volunteer driver and aide programs; and supporting new mobility management and coordination programs among public and/or human service transportation providers. Further information on eligible activities can be found at: http://www.fta.dot.gov/documents/TAD_New_Freedom_8_30_06_Final_tb.doc

Cost Sharing/Match Requirement:
Funds can be used to support up to 80 percent (80/20 match) for capital projects, and not more than 50 percent (50/50 match) of projects for operating assistance. Fare revenue generated on the service to be supported may not be used as matching funds for operating grants. Non-DOT Federal funds and local and private funds can be used as a match. Matching share requirements are flexible to encourage coordination with other federal programs that may provide transportation, such as Health and Human Services or Medicaid**.**

Project Selection for JARC and New Freedom:

Projects will be awarded through a competitive selection process. Applications will be received by DCHC MPO staff and passed along to the DCHC Technical Coordinating Committee (TCC) Transit Subcommitte. The TCC Transit Subcommittee who will review and score the applications. Representatives of this subcommittee will be familiar with local human service agencies, the target population documented in the CPT-HSTP, and the transportation issues affecting this target population. After scoring the proposals, the Transit Subcommittee will recommend projects for funding to the TCC. TCC will review the projects recommended for funding and make a recommendation to the DCHC Technical Advisory Committee (TAC). The TAC will vote on funding of the recommended projects. The list of approved projects will be published and submitted to the FTA for funding.

Note: All proposals should reflect public transportation and human service transportation priorities documented in the CPT-HST Plan. The recommended top tier priority needs are listed below:

- Mobility manager helping customers identify transportation options to meet their needs
- Intra-county and cross-county services connecting rural areas to urban areas
- A unified regional paratransit application and eligibility determination and certification process needs to be created so that it is streamlined, clarified, and consistent across agencies.
- Evening service (6pm – 10pm) and late night service (10pm – midnight)
- Universal fare card that works on all services
- Better on-time performance for fixed-route and paratransit
- Travel training

Application and Project Selection Schedule:

2/14/ 07 - TAC Review Draft CPT-HSTP/Project Selection Criteria

2/28/07 - TCC approve final CPT-HSTP/Project Selection Criteria and application package – recommend TAC approval

3/14/07 - TAC approve final CPT-HSTP/Project Selection Criteria and application package

3/16 – 4/27 Solicitation for applications

4/27/07 Application deadline

4/30 – 5/11 TCC Transit Subcommittee reviews and scores proposals

5/14 – 5/16 Transit Subcommittee selects CPT-HSTP projects for recommendation to the TCC

5/23/2007 TCC action on Transit Subcommittee recommendations

6/13/2007 TAC action on TCC recommendations

7/2007 Funding recipients receive notification

SCORING CRITERIA

The following information and scoring criteria will be used to score and rate project applications for JARC and New Freedom (NF) funding.

a. *Project Needs/Goals and Objectives (**30 points**)*: The project should directly address priority transportation needs identified through the Durham-Chapel Hill-Carrboro MPO's locally developed Coordinated Public Transportation - Human Services Transportation Plan available at www.gotriangle.org/coordinated_plan or call 919 560-4366. Project application should clearly state the overall program goals and objectives, and demonstrate how the project is consistent with the objectives of the JARC and NF grant programs. The project application should indicate the number of persons expected to be served, and the number of trips (or other units of service) expected to be provided.

b. *Implementation Plan and Evaluation (**20 points**):* For all projects, applicants must provide a well-defined service operations plan and/or capital procurement plan, and describe implementation steps and timelines for carrying out the plan. The implementation plan should identify key personnel assigned to this project and their qualifications. Project sponsors should demonstrate their institutional capability to carry out the service delivery aspect of the project as described.

c. *Project Budget (**15 points**):* Applicants must submit a clearly defined project budget, indicating anticipated project expenditures and revenues, including documentation of matching funds. Proposals should address long-term efforts and identify potential funding sources for sustaining the service beyond the grant period.

d. *Partnerships and Program Outreach (**20 points**):* Proposed projects will be evaluated based on their ability to coordinate with other public transportation, community transportation and/or social service resources. Project sponsors should clearly identify project stakeholders, and how they will keep stakeholders involved and informed throughout the project. Project sponsors should also describe how they would promote public awareness of the project. Letters of support from key stakeholders and/or customers should be attached to the grant application.

e. *Program Effectiveness and Performance Indicators (**10 points**):* The project will be scored based on the project sponsor's ability to demonstrate that the proposed project is the most appropriate match of service delivery to the need, and is a cost-effective approach. Project sponsors must also identify clear, measurable outcome-based performance measures to track the effectiveness of the service in meeting the identified goals. A plan should be provided for ongoing monitoring and evaluation of the service, and steps to be taken if original goals are not achieved. Sponsor should describe their steps to measure the effectiveness and magnitude of the impact that the project will have on target markets (i.e., persons with low-income for the JARC funds, or persons with disabilities or the elderly for the New Freedom funds).

f. *Innovation (**5 points**):* The project will be examined to see if it contains new or innovative service concepts or facilities that have the potential for improving access and mobility for the target populations and may have future application elsewhere in the region.

Project Requirements
The Selection Committee must find that the answer to each of the five following questions is affirmative for a project to be considered eligible for grant funding.
Project Evaluation Score sheet

Is the proposed project a non-duplicative service or program?	
Are eligible matching funds identified and available? (We need to check if fares are eligible?)	
Is the proposed project a new or expanded service or program?	
Is the primary focus of the proposed service or program serving target populations (i.e., persons with low-income for the JARC funds, or persons with disabilities or elders for the New Freedom funds)?	
Does the project provide benefits to the Durham – Chapel Hill – Carrboro urbanized area (see enclosed map)?	

Each proposal will receive a score from the Project Selection Committee according to following criteria.

Project Evaluation Criteria	**Possible Points**	**Project Score**
Project Need/Goals & Objectives		
How well does this project address high-priority needs identified in the Coordinated Plan?	20	
How effectively will this project increase the numbers of target market customers served?	10	
Implementation Plan		
What is the quality of the implementation plan?	20	
Project Budget		
How efficiently will the projects provide benefits to the customers (e.g., cost per customer served)	10	
How financially sustainable is the program/service beyond the grant period?	5	
Partnerships and Outreach		
How effectively are partnerships used in provision of the program/service?	5	
How strong is the demonstration of stakeholder support (e.g., survey data, letters from end users)?	5	
What is the quality of marketing/outreach plan?	5	
How widely will the benefits of this project be felt? (more points for region-wide benefits)	5	
Program Effectiveness and Performance Indicators		
What is the quality of the evaluation plan (including customer satisfaction, cost per unit of service, and customers per unit of service)?	10	
Innovation		
Does the project contain innovative ideas that could be applied elsewhere in the region?	5	

JOB ACCESS/REVERSE COMMUTE (JARC)
AND NEW FREEDOM PROGRAMS

APPLICATION FOR FUNDING (FFY 2006 and FFY 2007)

PART I - TRANSMITTAL

Applicant Data

Legal Name:
_____

Contact Person:
_____

Address:
_____

City, State, Zip:
_____

Telephone:
_____

Fax:
_____

E-mail:
_____

Project Description

TITLE_____
_____

BRIEF
DESCRIPTION_____
_____
_____
_____
_____

FUNDING PROGRAM: JARC____ New Freedom____

PROJECT TYPE Capital Only____ ____Capital and Operating

Operating Only____ ____Mobility Management/Coordinated Planning

SERVICE DAYS/HOURS
_____

ESTIMATED COST PER ONE WAY TRIP _____(operating cost)

ESTIMATED DAILY RIDERS_____(weekday/weekend)

PART II - NARRATIVE

Project Need/Goals and Objectives

1. Describe the unmet transportation need that the proposed project seeks to address and the relevant planning effort that documents the need. Does it cover an area targeted by the CPT-HSTP? Describe how the project will mitigate the transportation need. Estimate the number of people served and/or the number of service units that will be provided. Describe the specific community this project will serve, and provide pertinent demographic data and/or maps.

2. What are the project's goals and objectives?

Implementation Plan

1. Describe key personnel assigned to this project, and your agency's ability to manage the project.

2. Provide an operational plan for delivering service. Include route or service area map, if applicable. OR provide an implementation plan for completing a capital project, including key milestones and estimated completion date.

3. Explain how this project relates to other services or facilities provided by your agency or firm and demonstrate how it can be achieved within your technical capacity.

Project Budget

1. Project sponsor should provide a complete budget indicating project revenues and expenditures in the format provided in Part III and describe efforts to ensure its cost-effectiveness.

Coordination and Program Outreach

1. Describe how the project will be coordinated with public and/or private transportation and social service agencies serving low-income populations and individuals with disabilities.

2. Describe efforts to market the project, and ways to promote public awareness of the program. Letters of support should be obtained from key stakeholders and attached to the grant application.

Program Effectiveness and Performance Indicators

1. Project application should demonstrate that the proposed project is the most appropriate match of service delivery to the need. Identify performance measures to track the effectiveness of the service in meeting the identified goals. For capital-related projects, project sponsor is responsible to establish milestones and report on the status of project delivery.

2. Describe a plan for monitoring and evaluation of the service, and steps to be taken if original goals are not achieved.

Innovation

1. Describe any proposed use of innovative approaches that will be employed for this project. Discuss what is innovative about the approach and how the innovations could be applied to other services in the region.

PART III - PROJECT BUDGET

Project Funding

Local matching funds will be required for all application submittals. For projects requiring operating funds, the required match is 50%+ from non-federal transportation funds. For capital projects the required match is 20%+ from non-federal transportation funds

Total Annual Project Budget $_____(operating and capital only)

Capital Federal Share $_____ _____%

Capital Local Match $_____ _____%

Operating Federal Share $_____ _____%

Operating Local Match $_____ _____%Total

Local Match Funding Source_____

Note: The applicant is required to demonstrate a commitment to providing local match funds. This can be in the form of a letter and/or a copy of an existing grant agreement or supporting documentation where funds will be drawn from.

Will there be a commitment of funds beyond the grant period? ___Yes ___No

Describe:

_____
_____
_____
_____
_____
_____
_____