PERFORMANCE MEASURES FOR MOBILITY MANAGEMENT

Photo courtesy of Interfaith Senior Programs, Waukesha County, WI

NCMM

National Center for Mobility Management

MOBILITY MANAGEMENT IN PRACTICE SERIES

This brief explains the value of performance measurement to mobility management. It lays out a process for developing a performance measurement strategy, and suggests measures for a range of mobility management activities and ways to effectively share and leverage performance measurement results.

Mobility management is a customer-focused approach to creating and implementing transportation solutions—both on an individual and system level—that respond to a community's identified mobility needs. It leverages all available transportation resources, focusing less on who owns and operates those resources and more on how to combine access to those resources to meet mobility needs affordably, efficiently, and effectively. Mobility management

- Understands and responds to the travel needs of individuals in a sustainable way
- Encourages providers to be creative, disrupting business as usual where necessary by looking anew at services and innovating solutions
- Offers a full range of travel alternatives to the single-occupant vehicle, such as mass transit, cycling and pedestrian modes, shared rides, volunteer-operated services, and private options
- Offers customers a single point of access to multiple travel modes
- Is built upon the work of community-wide partnerships involving multiple stakeholders

As more transportation and human service agencies engage in and fund mobility management services, they will want to know the impact of these efforts on their broader programs and in communities. This brief addresses this need for data through a discussion of

- How to develop performance measures for mobility management activities
- What those measures might look like
- How to share performance measure data with stakeholders

PERFORMANCE MEASUREMENT

Performance measurement refers to the routine measurement of program inputs, outputs, outcomes, and impacts related to an organization's mission, vision, goals, and objectives. By regularly monitoring program operations, a mobility management program can

- Measure progress toward targets and goals

- Engage in informed decision making

- Guide operational changes that will eventually lead to better utilization of resources and improved outcomes
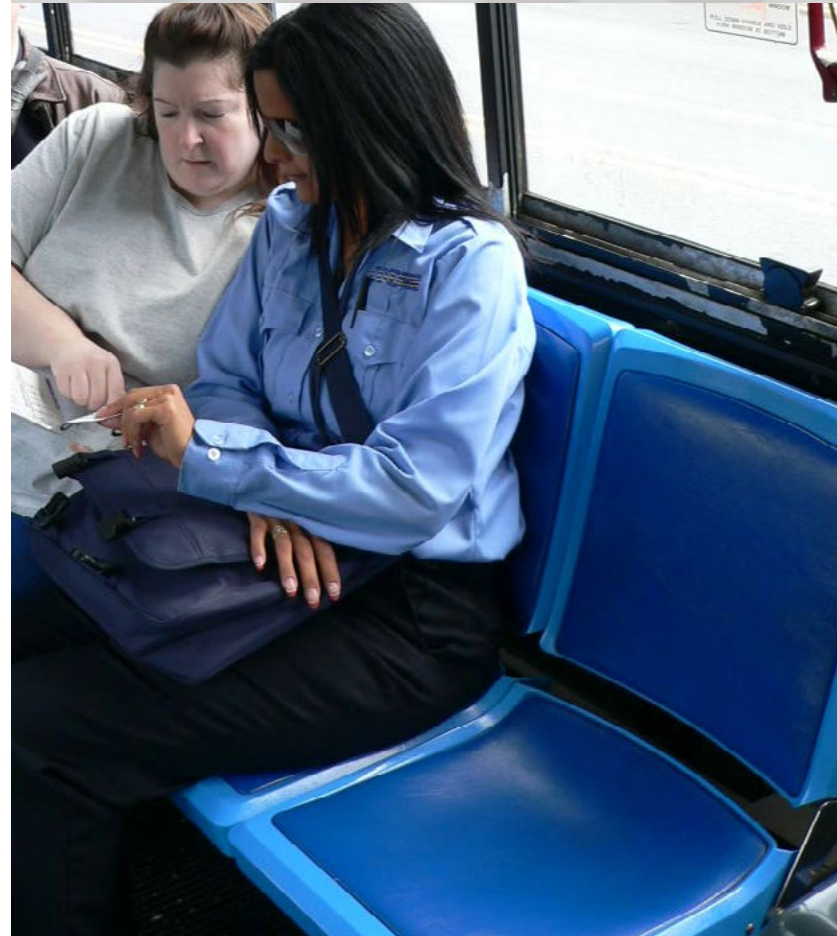

*Photo courtesy of Capital District Transportation Authority*

Mission, Vision, Goals, and Objectives

A *mission statement* describes the overall purpose of the organization, reflecting the organization's products and services, markets, and values. A *vision statement* can be thought of as the "artist's rendering" of the achievement of the mission. It conjures up a common image for all the organization's leadership, staff, and supporters as to the destination of their work together and characterizes how the organization will get there. *Goals* describe longer term (3–10 year) intended outcomes, often with measurable targets. The applicable time period of goal statements included in *strategic plans*—that is, detailed statements with specific operational strategies to achieve program or organizational goals—is usually consistent with the term of the strategic plan, generally 5–10 years.

Objectives are more immediate statements of how progress toward longer term goals will be measured; they tend to be specific mileposts achievable within 1–3 years. Each objective should fit the characteristics noted by the acronym "S.M.A.R.T.": that is, the objectives should be

- **S**pecific – Describe in clear terms the who, what, how, and where of an activity or series of activities
- **M**easurable – Define results that are quantifiable in raw numbers or percentages and that can be compared with baseline data to show progress
- **A**ttainable – Describe concrete results that can be achieved within the set amount of time
- **R**elevant – Clearly relate back to the organization's goals
- **T**ime-oriented – Be planned to be accomplished within a clearly defined time period

Matching objectives to these characteristics allows a mobility management program to develop clear statements and measure progress toward achieving its goals. Here is an example of a formula that can be used for drafting objectives:

Action verb		Activity		Quantity		Date
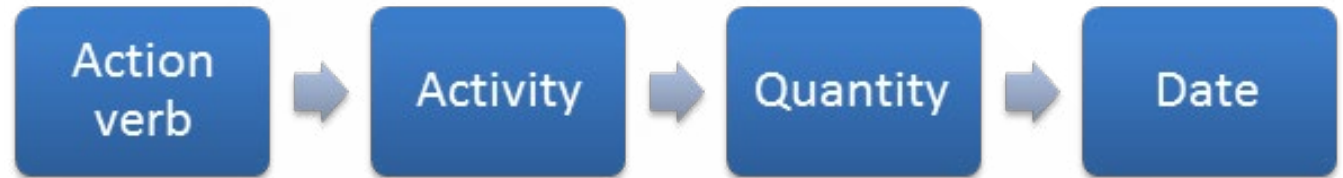
Example: We will market our one-call transportation information services at 15 senior housing complexes by December 31 to increase the usage of the one-call center among individuals age 70 and older.

*"Mobility Management is such a necessary service.
I have witnessed how transportation access plays a vital role in supporting independence and livelihood. It is of utmost importance to be able to measure and demonstrate its value in and for our communities."*

*-Erica Petrie, Mobility Manager
Area Agency on Aging 3, Lima, OH*

PERFORMANCE MEASURES

A *performance measure* is objective evidence related to a particular activity that, when compared with baseline, historic evidence, or an intended target, shows how well performance is moving in the direction of the desired end result.[1] Performance measures should *always* be created within the context of an organization's stated mission, vision, and objectives. Each mobility management activity is securely tied to these statements, and should move the organization further toward achieving them. The mobility management program itself should have a clear mission and vision, as well as goals against which progress toward mission achievement can be measured. In multi-agency mobility management efforts, all participating organizations support and participate in setting, collecting, and using performance measures.

Creating performance measures requires mobility managers to be able to articulate the following:

1. The organization's and mobility management program's <u>mission and vision</u>
2. The <u>goals</u> of the mobility management program, including the desired results
3. The short-term, concrete, measureable <u>objectives</u> for achieving the program's goals over the next 1–3 years
4. The <u>resources</u> realistically available to apply to the mobility management activities
5. The <u>relationship</u> among inputs, outputs, outcomes, and impacts. A logic model is a graphical depiction that can be a useful tool for demonstrating these relationships and for communicating the purpose of a program with stakeholders.[2]
6. Possible <u>targets</u> for outputs, outcomes, and impacts that can be realistically achieved given the level of funding and the level of activity. Historical performance measures (e.g., baseline levels) are often the best basis for setting targets; without those, it can be difficult to measure program achievements.
7. <u>Awareness</u> of factors in addition to the program that can affect the results achieved, such as the economy, characteristics of the service recipients, etc.
8. A <u>plan</u> for using the results of performance measurement to improve mobility management activities.

[1]Adapted from Barr S: A Definition of What a Performance Measure Really Is
[2]See, for example, the W.K. Kellogg Foundation Logic Model Development Guide

Performance measures should never be developed pro forma or "just because they are required." Done well, performance measures guide decision making and planning, document the value of mobility management activities, promote accountability, enhance transparency, and improve communication among stakeholders, including funders. It is critical for mobility managers to understand how to develop measures that reflect the outcomes and impacts of their efforts so that they can 1) improve their mobility management programs and 2) make their business case for additional investment and support of those programs.

Mobility managers should develop measures and capture data in the five basic categories of performance measures, showing the level of change over a defined time period for each:

- Inputs ("What did we invest?"): Quantifiable measures of resources used in the activity (e.g., financial resources, in-kind services, person hours, capital resources)
- Outputs ("What and how much was produced?"): Quantifiable measures of the activities produced with those resources. Typical outputs are the number of people served, the number of hours of service, the number of one-way trips provided, or other tangible, countable results of program activities.
- Outcomes ("What difference did our program's activities make?"): Quantifiable short-term, intermediate, and long-term results of an activity in the context of the organization's mission and vision that can be reasonably attributed to the activity
- Customer satisfaction ("How did our activities measure up to the expectations of program stakeholders?"): Quantifiable measures that indicate the quality of services provided based on the perspective of service recipients, funders, or other interested stakeholders (e.g., caregivers, partners)
- Impacts ("What broader levels of change can we attribute to our activities?"): Measures of how the lives of individuals and other stakeholders have changed because of the activities. Impacts are often longer term and may be more difficult to attribute to the program because of the number of external factors that can influence change in a particular area.

The chart below offers sample inputs, outputs, outcomes, and impacts for a regional one-call center scheduling rides to health care:

Input	Staff time and financial resources to establish and market a regional one-call center that can be used by a targeted customer group (e.g., seniors over age 70) to schedule rides
Output	# of rides scheduled through the one-call center by the target customer group, measured against the baseline
Outcome	Decrease in the # of missed appointments at local health care centers directly attributable to members of the target customer group finding a ride via the one-call center
Customer Satisfaction	% of riders satisfied with the customer service provided by one-call center staff % of riders satisfied with the accuracy of information % of riders expressing overall satisfaction with the one-call center
Impact	Improvement in the health status of riders accessing information through the regional one-call center

Simultaneously with crafting performance measures, mobility managers should also determine how the data needed to measure progress will be collected. For example, *outputs* are often counted, such as the number of people touched by or taking part in an activity, the number of events hosted, website analytics (e.g., number of downloads or visits), etc. *Outcomes* and *customer satisfaction*, often expressed in percentages, are measured through survey results (internal and external) and random sample interviews; outcomes can also be measured by analyzing fiscal data or other previously determined evidence against baseline data after an activity has been implemented. *Impacts* can be measured as the broader results of the activities, and may involve gathering data from partners in addition to internal and other external data.

PERFORMANCE MEASURES FOR MOBILITY MANAGEMENT PROGRAMS

Mobility management programs share some basic characteristics; for example, they all strive to simplify access to transportation services, achieve greater efficiency and productivity in delivering transportation services so that more people can benefit, and offer services characterized by greater choice and high quality. Performance measures pertaining to the activities of the lead mobility management agency as well as those of its partners will help to indicate if these goals are being met.

For example, to achieve the goal of improved efficiency and productivity among a community's transportation providers by coordinating services through the lead mobility management agency, improvement should be seen in program outputs such as

- Increased percentage of the local transportation operators participating in mobility management activities
- Increase in number of agencies formally involved by written agreement in mobility management activities
- Number of agencies informally involved in mobility management activities (but with no formal agreements)
- Decrease in number of mobility services provided in the service area that are not part of ongoing mobility management activities
- Increased percentage of the community's transportation vehicles dispatched by the lead agency

For performance measures reflecting the overall operations of transportation activities in the community, all transportation providers and purchasers in a community should be reporting their activities to the lead mobility management agency.

These program outputs should eventually lead to longer-term outcomes such as

- More mobility for a greater number of community residents
- Greater customer satisfaction
- Greater cost-effectiveness in the provision of community-wide transportation services

The table below offers potential performance measures for different mobility management activities. It is not an exhaustive list; as noted above, measures should be customized to each mobility management program's mission, goals, and objectives.

Sample Performance Measures

MM Activity	Input Measures	Output Measures	Outcomes/Impact Measures	Satisfaction Measures
Coordinated rides across agencies	• Allocated salary/fringe of each agency's coordinator • Allocated salary/fringe for each agency's management to set up coordinated system • Cost of software for coordinating rides • Fully allocated cost of each one-way trip provided by each agency	• # of one-way trips agency provided that also served clients of other agencies • # of one-way trips agency's clients made on another agency's vehicle • % of an agency's rides that were a coordinated ride (with other agency clients) vs. total number of agency's rides • % of all rides for agency's clients provided by another agency vs. number of all rides provided for agency's clients	• # of total per-passenger trips across partners (vs. baseline before coordination) • % drop in trip denials due to no available capacity • % decrease in fully allocated cost of rides per client	• % of passengers indicating they could now travel when before they might not have had a ride • % of passengers satisfied with level of customer service within coordinated system

MM Activity	Input Measures	Output Measures	Outcomes/Impact Measures	Satisfaction Measures
Volunteer Driver Program	• Allocated salary/indirect costs of volunteer driver coordinator • Costs of payments for incentives/mileage to volunteer drivers • Indirect costs (e.g., liability insurance) • Allocated salary costs of agency's management to set up and oversee program • Marketing costs	• Total number of volunteer drivers • % of volunteer drivers that are new • Number of customers served • % of total customers served that were new customers • # of one-way trips made w/volunteer drivers (vs. baseline) • # of hours volunteer driver services available (vs. baseline)	• % of customers who indicated they could not have traveled without the volunteer transportation service • Increase in number of destinations customers now able to reach	• % customers satisfied with volunteer driver service
Centralized call center for trans-portation information (for multiple transporta-tion services)	• Allocated salary/fringe for call center staff • Capital costs for call center • Indirect costs for call center • Allocated salary/fringe for agencies' management to set up and oversee program • Marketing costs	• Average # phone calls received/month • Number of new customers generated as a result of information on site (or due to call)	• Growth in average # of phone calls/month (vs. baseline) • % of calls that led to a completed ride • % decrease in cost-per-call vs. baseline	• % of customers indicating the information they received was useful • % of customers indicating they received good customer service • % of customers satisfied with the experience learning about/booking/accessing the ride vs. % satisfied with how this occurred through previous operations

MM Activity	Input Measures	Output Measures	Outcomes/Impact Measures	Satisfaction Measures
One-on-one mobility management services	• Allocated salary/fringe for mobility manager • Cost of training for mobility manager • Capital (in-office) costs for mobility management activities • Allocated salary/fringe for agency's management to set up and oversee program • Marketing costs	• Average # of customers helped/month • Ratio of # of customers served to # of staff hours invested	• Increase in # of customers indicating they could now travel when they couldn't before • Increase in # of post-hospitalization follow-up appointments customers attend because they now have transportation • Decrease in # of late arrivals or missed work days because employees now have reliable transportation to work	• % of customers indicating mobility management services were a key factor in their ability to access a ride • % of agencies to which customers traveled that credited mobility management services with ensuring their customers make appointments • % of agencies willing to contribute financially toward mobility management expenses
Travel Assistance/ Travel Training	• Allocated salary/fringe for mobility manager • Cost of training for mobility manager • Capital (in-office) costs for mobility management activities • Allocated salary/fringe for agency's management to set up and oversee program • Marketing costs	• # customers receiving travel training • # of hours a mobility manager spends on travel training • # of customers attributing their ability to now use transportation services because of travel training • Ratio of customers now traveling inde-pendently to # of staff hours invested	• % of one-way trips made by travel training customers on fixed route vs. paratransit (vs. base-line before receiving travel training) • % of customers reporting travel training made a positive impact on their ability to get to destinations	• % of customers more satisfied with their ability to get to destinations as a result of travel training • % of family members/ caregivers reporting satisfaction with travel training services

SHARING YOUR PERFORMANCE MEASURE DATA

A mobility management agency can use its performance measurement data to communicate progress to its stakeholder group, defined both narrowly (e.g., staff, funders, partners, end users) and broadly (the community at large, elected officials). Yet, as an organization's cache of data grows, the challenge becomes how to communicate those data in a meaningful way and how to leverage the data to promote the missions of the participating organizations as well as that of the mobility management program.

The key to sharing large data sets is to synthesize them so that they are easily digestible. Any data reported, whether in text or graphics, should be tied to the organization's goals and objectives. Doing so can increase accountability, giving funders and other stakeholders confidence that their resources are being spent in a targeted way to achieve intended results.

One type of graphic for sharing your performance measure data is a dashboard. In creating a dashboard there are a number of "dos" and "don'ts" to keep in mind:

- Avoid data that are incorrect or misleading.
- Don't offer too much information; prioritize what data to share based on the needs and interests of the audience so that you do not overwhelm them with data that are either too detailed or too general to be useful.
- Provide data in alternative formats so it is accessible to all potential users.
- Communicate with stakeholders regularly about their use of the data to make continuous improvements to meet their needs.
- Keep the performance measurement data development process timely; older data are less useful.
- Make sure to use high-quality, well-developed data.

The Council of Nonprofits has created a [resource](#) for nonprofits developing dashboards. From the for-profit world, Juice Analytics.com has created a comprehensive [guide](#) to creating dashboards, including a discussion of the types of different graphics, colors, and layouts and their use.

CONCLUSION

Mobility management can open the world of transportation resources to many people and help communities thrive by ensuring their residents can travel to needed destinations. As the value of mobility management is increasingly recognized, all indications point to its sustained growth, as well as its integration into non-transportation sectors, such as workforce, healthcare, and housing. The data gathered and shared through a performance measurement strategy can support this growth and increased collaboration; the data can tell the story of the power of mobility management to improve the quality of life for many individuals.

Photo courtesy of Southwestern Wisconsin Community Action Program

"Performance measures help Mobility Managers, state, federal and local government offcials identify and track how well we have clarified and defined mobility needs, as well as to create and design cost effective modes of transportation."

-Lori Jacobson, Mobility Manager, Southwestern Wisconsin Community Action Program, Inc.