

Mobility Management: Introduction, Implementation, Community Service and Seniors



**Federal Transit
Administration**

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About the National Center for Mobility Management (NCMM)

The National Center for Mobility Management is a national technical assistance center funded through a cooperative agreement with the Federal Transit Administration, and operated through a consortium of three national organizations—the American Public Transportation Association, the Community Transportation Association of America, and Easterseals Inc. The mission of the Center is to promote customer-centered mobility strategies that advance good health, economic vitality, self-sufficiency, and community.

About the Corporation for National and Community Service Senior Corps Program

Senior Corps connects more than 245,000 Americans to service opportunities in their communities. Senior Corps volunteers use their acquired skills, knowledge, and experience to make a difference to individuals, non-profits, and faith-based and other community organizations throughout the United States. It is comprised of three programs: the Foster Grandparent Program – a mentoring program in which seniors “adopt” children and youth with special needs; RSVP – a senior volunteer program; and Senior Companion Program – which helps frail seniors and older adults maintain independence.

Mobility Management: Introduction, Implementation and Serving Seniors

Purpose and Introduction

Since November 2016 the National Center for Mobility Management (NCMM) and Senior Corps have worked together to highlight the principles and history of mobility management for Senior Corps programs and to present special issues surrounding senior mobility and providers of transportation services for seniors. This collaboration began with two webinars for Senior Corps grantees, one offering an overview of mobility management generally ([available here](#)) and another focusing on mobility management’s potential to improve access to healthcare ([available here for Senior Corps grantees](#) and [here](#) for non-Senior Corps grantees).

This implementation guide, a continuation of that collaboration, is meant to be a resource for current mobility management professionals, volunteer driver programs, other Senior Corps programs, and human services and healthcare practitioners who are interested in the practice of mobility management as it pertains to seniors. This guide can also help professionals involved in programs funded by CNCS to integrate mobility management strategies into their work.

Mobility management is.....

A customer-centered approach to finding transportation solutions for all populations with a particular focus on people with disabilities, aging populations, English-language learners, low income communities, and other groups with unique needs.

This guide is divided into three sections. Readers will find information about the basic concepts and history of mobility management, a step-by-step reference for starting a mobility management practice, and mobility management for seniors as a specific population.

NCMM Regional Liaisons are.....

Technical assistance staff who specialize in helping people find mobility solutions. They are divided up by FTA Region and, as such, have unique relationships with local, state and regional transportation officials in every area of the country.


Beyond the information contained in this guide there is a resources section at the end that readers can reference for more information on mobility management, transportation, and planning and mobility for specific populations. Ultimately, this implementation guide is meant to be a starting point for those interested in learning about and doing the work of mobility management. As always the National Center for Mobility Management has [Regional Liaisons](#) available to answer any and all requests for technical assistance.

Basics and History of Mobility Management

This section will serve as an introduction to the concept of mobility management, a brief history of its evolution, a description of the practice of mobility management, and information about the individual attributes and competencies that mobility management professionals possess.

New Tool!

Look for this icon to spot links to tools and resources throughout this document, like the list of Regional Liaisons above.



The concept of mobility management is a fairly recent one when compared to the long history of modern transportation planning and provision in the United States. Primarily the concept of mobility management can be thought as transportation providers shifting their focus from operational concerns to the concerns and mobility of individual **consumers** of transportation services.

How was transportation approached before mobility management? Historically, transportation providers—whether buses, taxis, even volunteer transportation— had an easier task than what they face today. Communities were smaller, there was less sprawl, and transportation needs were more predictable. In this era, operational concerns were of prime strategic importance and customer concerns were largely subordinated—not ignored, but subordinated—to the larger mission of successfully running a system. In this context, transit measured its success by its efficiency, effectiveness in providing services, and productivity.

In 2003 a movement began among transportation experts to elevate the quality of the customer’s experience to be of primary strategic importance and to subordinate the dozens of activities involved in service design and delivery to that principle. This was a totally new approach. The historical process of providing transportation meant focusing on one’s own services (i.e., a public transit provider is concerned only with their bus or rail service, and a paratransit provider is concerned only with their accessible vehicles). A shift toward putting customers’ needs and experience first meant abandoning that “silo” approach and connecting transportation customers with services that might not be directly under the control of particular providers.

Readers familiar with the provision of healthcare might recognize a similar shift in that industry. The delivery of healthcare to patients has transformed from an individual patient/sickness model into an all-encompassing community health model in which acute patient needs are still highly relevant, but wherein the needs of the entire community are prioritized and traditional silos of healthcare, nutrition and other related activities are broken down.

How does mobility management, this prioritization of customer needs, look on the ground?

Mobility management is:

- Innovation in transportation service and coordination – not doing things the usual way because that’s the way we’ve always done it
- Local and regional solutions to fit community needs and visions
- Assisting people facing transportation challenges – whether youth, people with disabilities, **older adults**, people with limited incomes – to get where they need and want to go so they can live fulfilling lives in their communities
- Systematic gathering of information about providers and other resources to provide referrals to assist individuals in learning

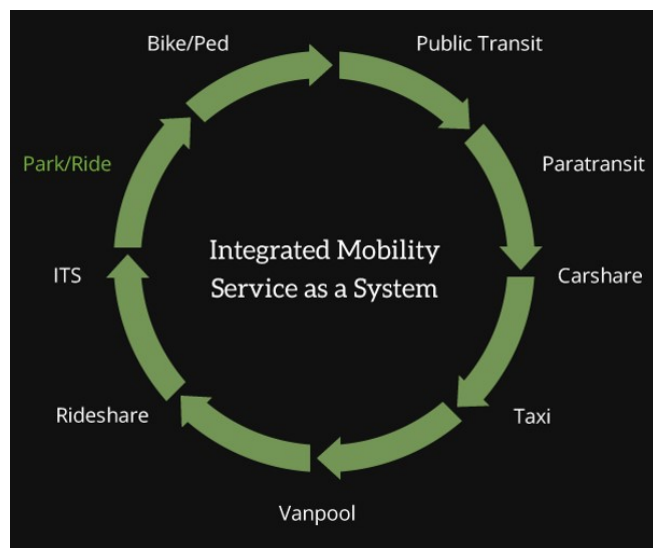


Figure 1 - Mobility management knits together different modes of transportation to meet customer needs.

about and accessing community and regional transportation services

- A shared table of transportation providers, planners, and community stakeholders, including volunteer driver programs, who collaborate, plan, implement and maintain a family of transportation services

These attributes of mobility management can be grouped in to two main actions: 1) Understanding the customer a mobility manager is trying to serve, and 2) Identifying transportation services in the community. Those two actions are not fully encompassing of a mobility manager's job, but they are the two main activities that must be in place for a mobility manager to begin the step-by-step process of finding transportation solutions.

In order to accomplish these actions a mobility manager, or those who perform mobility management activities as part of a broader role, must have certain skills and attributes. The diversity of the activities above necessitate that mobility management professionals step into several roles depending on who they are working with and what they are aiming to accomplish.

Mobility management professionals are:

- Problem solvers
- Tireless advocates for those who need transportation
- Facilitators of group discussions and problem-solving groups
- Teachers on content and process
- Communicators who can connect people, agencies, and systems
- Cheerleaders who can champion the enterprising spirit of potential solution makers

In short, it is imperative that individuals or groups of mobility management professionals understand the unique challenges and the attributes they will need to have in order to help their customers connect to transportation solutions. This is true regardless of whether a mobility manager works for a transportation agency, human service organization, or any other entity where arranging transportation solutions is part of the job.

Mobility Management: Step by Step

As briefly described above there are two main activities that mobility management professionals must perform to connect people with transportation solutions. The first is to understand the customer (or population) they are serving. The second is to have a complete understanding of all of the transportation services and providers within the service area their customers live and are traveling to and from. Once a mobility manager has a handle on those two main actions the step-by-step process of connecting customers to transportation solutions can begin. This section will detail the process by which a mobility manager understands customers' needs and builds a database of transportation options in the community and/or region. What follows is a condensed five step process that lays out the cycle of mobility management from beginning to end and back again.

Step 1: Understanding Your Customers

To serve all the different types of customers, a mobility manager-- in concert with partners, must first understand the needs of those customers. This step focuses on how to do that by first identifying who a mobility manager's customers are and then exploring how to begin to understand their transportation and other needs.

It is important to understand that the customers of a mobility manager are not just the individuals who are seeking transportation, customers can also include other organizations and the community as a whole.


Broadly speaking, there are four types of potential “customers” of mobility management professionals:

- Individual riders and their caregivers
- Particular groups of individuals (e.g., the general public, rural residents, people with disabilities, those needing medical trips, etc.)
- Agencies and transportation providers that serve groups of individuals
- The mobility management network itself

As a new mobility manager, it may be overwhelming to work with many different types of customers at once. Partner organizations can help prioritize which customers get top priority. Keep in mind that these priorities will likely change over time.

The most straightforward way to learn about individual riders’ needs is through one-on-one or group conversations. Those individual conversations may take place after a referral from an agency or a family member or when an individual makes direct contact. For individuals with emotional, cognitive, or communication disabilities, it is important to bring family members and/or other caregivers into the conversation to ensure the group forms a complete picture of needs and resources.

New Tool!
Use the needs assessment tool below to identify individuals’ specific needs.



If a mobility manager is hired to work directly with individuals, it is likely that those individuals will have complex transportation needs. To guide the process of discovering these needs, we have created an Individualized Transportation Needs Assessment tool. The tool is available for download [here](#) and use it as is or it can adapt to specific requirements.

The Needs Assessment tool consists of six steps that are arranged in a manner to help guide mobility management professionals through the process of collecting all pertinent information from individuals or groups. If you have any questions about the contents of the Needs Assessment tool, its implementation in the field or have trouble downloading the file from the link above please contact the [Regional Liaison for the local area](#).

As previously mentioned, collection of this information can be done through direct interviews. However, there is also the possibility of building a network of healthcare and human service organizations which may be able to provide a mobility manager with much of the information needed about individuals and groups. This is the point at which the other customer types become more relevant to a mobility manager’s work. By both requesting information from and assisting other organizations in finding

Six Steps of Needs Assessment.....

- 1) *Explore current transportation options for the individual*
- 2) *Identify where and when the individual needs to travel*
- 3) *Identify considerations that may impact the individual’s mobility*
- 4) *Determine if the individual is eligible for ADA complementary paratransit or similar services*
- 5) *Identify applicable community transportation options*
- 6) *Assess the individual’s ability to pay for transportation.*

transportation solutions for people they come in contact with, a mobility manager is serving groups of people and other agencies as well as their mobility management network as a whole.

In terms of serving employment and human service needs, the mobility manager can work with staff within these agencies, such as job developers, social workers, or case managers. In so doing, mobility management professionals can leverage the relationships these professionals already have established with individuals.

Thus, the mobility manager's "customers" are also staff at workforce or human services agencies. Mobility management professionals need to understand the reality of these professionals' daily lives and how to best serve them. For example, what is the most effective way for a mobility manager to inform them about transportation services that will help their clients? What type of process for collecting data on client unmet needs is the least burdensome for agency staff? How should mobility management professionals approach these agencies and their directors?

A mobility manager's "customer" could be the organization or agency itself, which also has needs. Employment, social services, and other agencies often identify missed or late appointments as a frustrating and costly issue. When individuals have effective options to travel around their community, this can help reduce the number of late or missed appointments, can lower resistance to following through with referrals, and enhance their ability to adhere to training or treatment regimens and/or maintain employment.

Another customer could be businesses. Employers are often concerned when their employees cannot get to work because their usual mode of transportation has fallen through, their car needs maintenance, they don't have enough money for gas, or their carpool didn't go that day. Or perhaps a youth-services organization has lots of good after-school programs available, but young people can't get there. Or people going to a center for independent living are having difficulty getting to the site. All of these agencies and programs could effectively be customers of the mobility management network.

These intersecting groups all come together to form a mobility management network. So, in addition to understanding the needs and capabilities of the individuals to whom transportation solutions are provided, it is incredibly important to understand the needs, capabilities and limitations of partner organizations and entities.

Step 2: Understanding Your Community's Transportation Options

In concert with understanding the customers you will serve as a mobility manager professional it is vital to be know all of the existing transportation options available in the community and region. These options can include a wide breadth of services, such as:

- Bus and van services
- Shuttles
- Shared ride services, such as carpools and vanpools
- Ferries
- Volunteer services
- Bicycle and pedestrian options
- Shared cars and bicycles

New Tool!

Use the Transportation Provider Profile below to organize options and match them to needs.



If you have been working with transportation or human services organizations there's a very good chance you are already aware of many of these options. However, it is always useful to do a thorough search to make sure

that there are no transportation options that have been missed. In order to help systematize this search, the National Center for Mobility Management has a few tips as well such as a [Transportation Provider Profile](#) tool which will help organize all options and fit them to the customer needs identified with the Individualized Transportation Needs Assessment.

The most important thing to know before starting this process is that many providers can be found in pre-existing lists. The first place to check for an “inventory of transportation services” is with the local metropolitan planning organization, rural planning organization, local economic development organization, or local council of government. Since October 2007, communities were required to develop such a list before they could apply for certain types of federal transportation funding. These organizations may also have an inventory of services that was pulled together as part of a study of transportation needs.

Also contact these types of organizations to see if they have gathered such a list of services:

- State departments of transportation, particularly the office in charge of administering transportation grants or the agency that oversees human services transportation
- A local transportation management association (usually made up of local businesses and transportation professionals)
- A tourism agency or convention or visitors’ bureau
- The agency in charge of emergency evacuations, which sometimes maintains a list of registered vehicles that could help in the case of an evacuation

Use the initial interaction with these agencies and organizations as a time to also begin building a relationship with them. Some of these may become important partners in future efforts to coordinate transportation and develop new services.

These local inventories of transportation services should cover all the available publicly funded transportation services in an area. However, sometimes they do not include all services provided by local governmental agencies or private providers—some of their information may already be in the inventory, but maybe not all. So what other types of services should be added to the inventory?

First let’s look at other types of public agency-sponsored services. Sometimes the local Area Agency on Aging or Council on Aging, the department of social services, the department of mental health services, or a workforce development agency will run a van or shuttle between the agency and common destinations for their clients. Most local school districts provide transportation for their students and should be included in the inventory. And don’t forget about agencies and organizations that coordinate community efforts in emergency/evacuation situations. Contact all of these groups to see if they provide transportation services. Also, ask the contact at these agencies if they are aware of private providers or volunteer driver programs or other transportation resources that should be included in the transportation inventory.

Second, think about all of the private providers of transportation in the local community. Faith-based organizations (e.g., churches, temples, or mosques) or community-based organizations such as the YMCA may have created a volunteer driver program. They may also run vans or shuttles with their own vehicles. The same may be true for local advocacy organizations, such as Easterseals, United Cerebral Palsy or a local association serving individuals with visual impairments.

A word about these types of private providers: Each of them may say any vans or shuttles they operate are for their clients only; however, chances are their vehicles sit idle in their parking lots for significant parts of the day. Once there is a relationship with these programs, it is possible to consider sharing the insurance, costs, maintenance, and purchase costs of these vans or other vehicles with other organizations. Several communities have done this successfully.

Third, don't forget to talk with private taxi and chauffeur companies in the area. If there is a persistent need for repeated trips in the community, such as a patient who needs to travel to dialysis treatment three times a week, a taxi company may be willing to contract for services at a cost lower than that for individual trips. It might be possible to do the same thing with private medical transportation providers, who often can accommodate patients' needs for wheelchair-accessible or stretcher transportation in non-emergency situations.

Other providers that should be listed in the provider database include private vanpool companies; public and private ferry services or water taxis, if near a major body of water; airport shuttles; and university or community college services. Once this process is complete it is time to begin the cycle of finding and updating solutions for individuals and groups.

The Mobility Management Cycle

The actual process of finding solutions starts with, but is not as simple as, connecting customer needs to the transportation provider profiles. The graphic below shows a five-step process that mobility management professionals can use to develop solutions. In addition to understanding customers' needs (Steps 1 and 2) and the available options (Step 3) it is vital to be inclusive of their feedback and to monitor the solution provided in order to ensure that it is consistent and sustainable (Steps 4 and 5).

Services to Consider (Even in Rural Areas)

- 1) *Fixed route – bus, subway, rail, trolley*
- 2) *Shared vehicle (car share)– such as Zip Car, Enterprise Plus*
- 3) *Shared ride – ride boards, slug lines*
- 4) *Transportation Network Companies (TNCs)- Uber, Lyft, Bridj*
- 5) *Feeder systems*
- 6) *Volunteer driver programs*
- 7) *Voucher programs*
- 8) *Paratransit – door to door, curb to curb*
- 9) *Bike share*
- 10) *Travel training*
- 11) *Pedestrian programs – walking buses*
- 12) *Even dog sleds in some communities!*

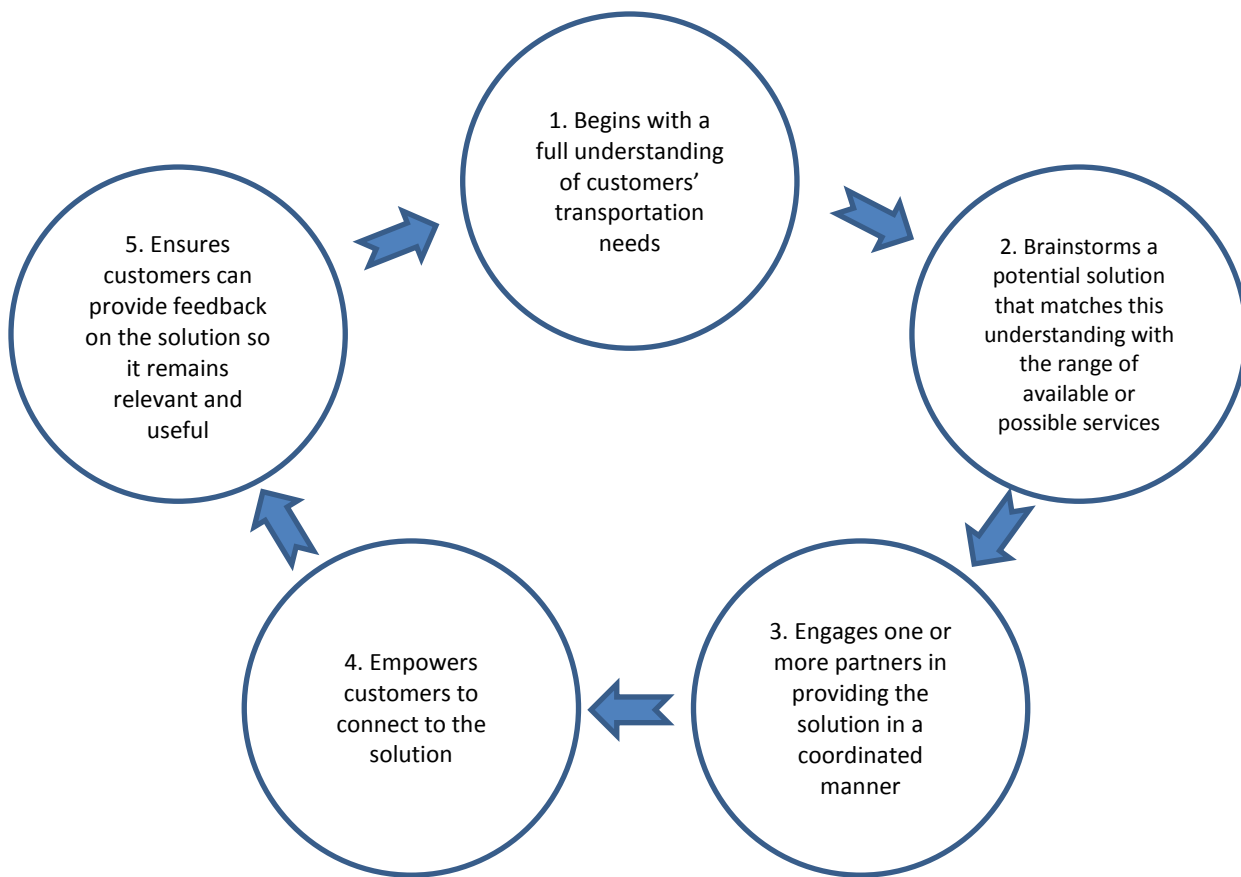


Figure 2 - The five step mobility management cycle

The National Center for Mobility Management envisions this process as a cycle rather than a static list with a beginning and end because it encourages mobility management professionals to continue putting customer needs, experiences and feedback in the forefront rather than retreating to the previous method of simply analyzing system performance in a vacuum.

Mobility Management for Older Adults

This section will present some facts about the “graying of America” as it is called by planners and sociologists and connect that phenomenon to potential transportation solutions that mobility management professionals should keep in mind when prioritizing those solutions for older adults. Another FTA-funded national-level technical assistance center called the [National Aging and Disability Transportation Center \(NADTC\)](#) produces valuable resources that are located at the end of this document.

When discussing specific transportation needs, older adults make up a large portion of the population who rely on community transportation. Older adults have diverse transportation needs, often intersecting with other key identifiers such as disability, geographic isolation, and limited income.

Here are some points about aging and older adults to bear in mind:

- Their geographic location, income, culture, and health and disability status as well as working status shape the transportation needs and preferences of older adults. (Foley 2002)

- Transportation is a top need of older adults, especially for those whose driving abilities have begun to diminish. One of every five noninstitutionalized persons over age 65 is a non-driver. (Federal Interagency Forum on Aging Related Statistics 2016)
- Specialized transportation is the only feasible mode for frail older persons, other than getting rides from family and friends. They will often need travel escorts and door-to-door and door-through-door assistance so they can continue to live independently in their own homes and connected to their communities. Lost mobility jeopardizes not only the physical and emotional health of the individual, who may feel a sense of loss and dependency, but also the quality of their community.

Accompanying these general points is the fact that more and more older adults are extending their participation in the labor force beyond retirement age due to a combination of factors such as financial need, personal preference and advances in healthcare have made the ability to work longer possible.

With these key facts in mind, what type of transportation services should mobility management professionals prioritize when assessing the travel needs of older adults?

Consider public transportation first. Older adults, if they live where public transportation is provided, can – and do - generally use public transportation. The flexibility and freedom that public transportation offers to older adults are strong incentives for them to use it. They can go to the bus stop or station and get on. No need to make a reservation and no need to tell anyone where they are going or why.

Some older adults may use community transportation services because they cannot afford to own and maintain a car. Federal law mandates that, on federally supported urban transit systems, adults age 65 and over can travel during non-peak times at no more than half of the normal peak fare. The most frequently noticed limitation on the use of a senior fare is that it generally does not apply during peak commuting hours. Reduced fares may also not be transferable to adjacent transportation systems. For example, an older adult rider may need a special coupon in addition to her/his ID card or pass to ride a bus service run by another jurisdiction in the same metropolitan area. After a few trips, most riders become familiar with and adjust to limitations and conditions that affect their travel. For older part-time and occasional workers (paid and volunteer) who travel to work outside rush hour, the reduced senior fare can be just the ticket.

Some systems, such as those in Pennsylvania, allow adults age 65+ to ride for free. Systems providing free or discounted rides to seniors usually require them to obtain an ID card or special pass to access senior fares, although some will accept a Medicare card as proof of age. Area residency is also often a requirement to obtaining a pass for local transportation services. These passes or cards are usually valid for only a certain length of time, but often can be renewed. Many providers require a filing fee to obtain a card or pass and some charge a renewal fee.

Many rural systems also choose to offer reduced fares to older adults. Of course, older employees are eligible for the same employment-related transportation benefits that younger commuters have access to at work. Some older adults may not consider taking public and other forms of community transportation until circumstances force them to limit or give up driving their own vehicle. For adults who have never used public transportation before, this can be a step into unfamiliar territory. Some form of travel instruction to familiarize older riders with how to use the local transit system is often sufficient. A local transit agency may already offer videos on how to ride.

Seniors can also work with transportation providers and local officials on needed improvements to their facilities to address older riders' concerns, such as providing better lighting, improved access for pedestrians and people with disabilities to bus stops, shelters at as many stops as possible, and easy-to-read route maps.

Frail older persons and those with severe mobility impairments need special transportation services. They can become eligible for demand-response services in their community through their local transit agency. Well-trained volunteer drivers are also a good option.

Demand-Response Service is.....

A form of public or private transportation service that can be scheduled ahead of time, serving the individual or group's need to access locations in a predictable and plannable manner. The flexibility and cost of demand-response services vary based on the program or organization offering the service.

Funding for Senior Transportation Services

How are transportation options for seniors funded? In addition to funding for general transit services, Federal Transit Administration Section 5310 funding (also known as the [Formula Transportation Program for Elderly Individuals and Persons with Disabilities](#)) has been the primary source for public and, in many communities, private nonprofit organizations, to secure vehicles and other capital items to serve older adults. Section 5310 funds have been used primarily for capital purchases or to contract for services.

What are some other publicly funded senior transportation programs? In rural areas, general public transportation is provided by a nonprofit human services agency such as a Council on Aging or an Area Agency on Aging. These agencies may also provide meal deliveries, grocery shopping, other social services, and volunteer driver transportation programs. The Area Agency typically receives transportation funding from Title III-B of the Older Americans Act to provide the services, and from the Section 5310 funds for the vehicles. Transportation providers, usually in rural areas, that receive funding from the Older Americans Act are not allowed to charge for services, although they can ask for donations. For example, the HOP, a transit system operated Hill Country Transit District in central Texas, operates on the honor system. Riders do not need to show an ID; a sign notifies riders that anyone 60 or over does not have to pay a fare but can make a donation. General rural transit, open to riders of all ages, may be funded through FTA's Section 5311 Formula Grants for Rural Areas program, another source that supports community transportation in rural and frontier areas.

In addition to these programs there is, of course, the Corporation for National and Community Service and specifically the Senior Corps program, which sponsors various volunteer programs that may include volunteer drivers. To learn more about Senior Corps activities in your state, reach out to your local [CNCS State Office](#). As in all of mobility management, the most important aspect of serving older adults in the community is keeping apprised of all available programs and asking questions even when it seems as if no programs are available. Making connections with legislators, transportation planners and providers, human service organizations and other related entities will expand the network and reveal new solutions to be possible.

The unique challenges of an aging population and myriad, overlapping transportation services are sometimes difficult to contend with. However, the intersection of those unique challenges also provide a common cause for many different organizations to work to provide mobility services to a variety of populations in need. It is the hope of the National Center for Mobility Management and CNCS' Senior Corps program that this guide serves as a starting point for vital partnerships in communities around the country.

Other Resources

[AARP Public Policy Institute. "Weaving It Together: A Tapestry of Transportation Funding for Older Adults", April 2013.](#)

A thorough guide to the many programs that fund senior transportation. Although the document is close to four years old it still has plenty of pertinent information.

[American Occupational Therapy Association, Inc. \(AOTA\). Driving & Community Mobility](#)

The AOTA has an entire advocacy mission dedicated to Productive Aging. Part of their research and communication on the topic has to do with transition to a safe driving plan or a transition out of driving altogether.

[Community Transportation Association of America – Senior Mobility](#)

Contains valuable information for beginning and operating a volunteer driver program as well as social media and direct contact information for CTAA staff that focus on senior mobility.

[Federal Interagency Forum on Aging-Related Statistics](#)

This report from 2016 is an excellent resource for statistics covering many areas of professional, social and personal activity all focusing on the current state of life for American seniors.

Foley, D. "Driving Life Expectancy" *American Journal on Public Health*, August 2002.

Excellent information regarding the intersection of transportation and aging.

[Independent Transportation Network of America](#)

A non-profit dedicated to promoting lifelong mobility for seniors.

[National Aging and Disability Transportation Center \(NADTC\)](#)

The NADTC, like NCMM, is a national research and technical assistance center. Whereas NCMM focuses on mobility solutions for a variety of groups, NADTC is focused specifically on the two groups in its name and has myriad resources on the subject of transportation for older adults and people with disabilities.

[National Volunteer Transportation Center \(NVTC\)](#)

NVTC promotes and supports the concept and practice of volunteer transportation, which includes volunteer driver programs, shared vehicle utilization, and ride sharing initiatives. NVTC identifies and shares promising practices through informational and technical resources, online educational programs, and communication with volunteer and volunteer transportation initiatives across America. Their [Volunteer Driver Recruitment and Retention: Experience and Practice](#) handbook features strategies for attracting suitable volunteers and retaining them.

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