



BOSTON REGION METROPOLITAN PLANNING ORGANIZATION

Richard A. Davey, MassDOT Secretary and CEO and MPO Chairman
Karl H. Quackenbush, Executive Director, MPO Staff

MEMORANDUM

DATE February 21, 2013
TO Boston Region MPO
FROM Alicia Wilson, MPO Staff
RE Job Access and Reverse Commute and New Freedom Federal Grant Program Projects in the Boston Region Metropolitan Planning Organization Area: An Evaluation

Introduction

Information in this memo refers to programs initiated under the previous federal surface transportation act. A new act, MAP-21, with several program changes went into effect on October 1, 2012.

Job Access and Reverse Commute (JARC; 49 USC Section 5316) and New Freedom (49 USC Section 5317) are federal formula grant programs whose eligible recipients are states and public bodies. The Massachusetts Department of Transportation (MassDOT) is the eligible recipient for the Boston Urbanized Area (UZA), which contains the Boston Region MPO and four other MPOs in Massachusetts.

JARC provides grants to support the development and maintenance of projects designed to transport welfare recipients and eligible low-income individuals to and from jobs and activities related to employment. New Freedom provides grants for new public transportation services and alternative forms of public transportation that assist individuals with disabilities and exceed the requirements of the Americans with Disabilities Act of 1990.

Title 49 U.S.C. Section 5316 and Section 5317, as amended by SAFETEA-LU, require fund recipients to certify that projects selected are derived from a locally developed, coordinated public transit–human services transportation plan. The MPO’s plan was developed in 2008 and updated in 2010. The plan provides guidance for improving transportation services in the Boston region for people with disabilities, elderly individuals, people with low incomes, and reverse commuters. The MPO initiated development of the plan by identifying existing resources, transit markets to target for service improvements, and gaps in transportation services.

Proposals submitted in the Boston UZA for funding under the JARC and New Freedom programs are evaluated by the five MPOs, which decide which applications to advance and prioritize them. The selected applications and the

priorities are forwarded to MassDOT, which then uses a competitive selection process to determine which proposals will be funded.

There have been five proposal solicitations in the Boston UZA since 2008. This memorandum evaluates the performance of the projects that were funded in the first four solicitations. The first was held in 2008, the second in 2009, and two in 2010. This memorandum does not examine projects from the latest solicitation, which began on February 29, 2012, or use any data related to that solicitation. In 2008–10, nine agencies in the Boston Region MPO area received 16 JARC grants, and twelve received 22 New Freedom grants. Several of these agencies received both JARC and New Freedom grants. Some of the grants funded additional years of previously funded projects.

The funded projects and the organizations implementing them are diverse in nature. Funded agencies include regional transit authorities, state agencies, private non-profits, and private for-profits. Types of funded projects include studies on facilitating coordination of existing transportation resources; identifying resource gaps and developing strategies for closing them; enhancing consumers' abilities to access and use transportation options; and planning for and operating paratransit services.

The primary purpose of this memorandum's evaluation of the Boston Region MPO-area projects is to assess the proponents' implementation of the projects and how successful the projects have been in reaching their stated goals. The evaluation also examines the question of whether some types of projects or proponents have been relatively more successful, because in that case the MPO might consider factoring in that information when selecting applications to advance.

Evaluation Methodology

Data Collection

A printed packet including a letter requesting information, project profile forms, and reporting matrices was sent by U.S. mail to all 16 distinct JARC and New Freedom grant recipients. (A copy of the initial packet is included in Appendix 1.) The same packet was also e-mailed to all recipients. A second request was mailed and e-mailed to each entity that did not respond by the date indicated in the original request. After both rounds of requests and follow-up phone calls, 13 entities had responded (81% response rate).

The project profile form requested information on the primary service/project goal, a service description, major accomplishments, how the service is evaluated by the entity, and lessons learned.

The Federal Transit Administration has sponsored several JARC and New Freedom program evaluations. In keeping with these evaluations, the reporting matrices sent to entities included in this analysis cover three basic project types:

- **Trip-based services**, which provide transportation directly to individuals
- **Information-based services**, which provide information about transportation services to individuals but do not provide transportation services directly
- **Capital investment** projects, which provide vehicles, facilities, and other infrastructure to support transportation services

Federal evaluation-reporting requirements cover five primary program goals. In addition to these, this evaluation includes a sixth goal applicable to planning studies, because of the number of such studies funded in the MPO area. The goals are:

- **Expanded geographic coverage of service**
- **Extended hours or days of service**
- **Improved system capacity** (additional quantities of service)
- **Improved access to service or improved connections between services**
- **Improved customer knowledge** (additional resources providing information and/or training)
- **Provision of information on specific populations and on how to implement projects** (These are goals of planning studies.)

Measures of Effectiveness

In order to measure the success of each project, this evaluation compared the stated and achieved goals of the project, rather than using set criteria. There are two primary reasons for this. First, the JARC and New Freedom programs do not have specifically defined and quantifiable goals such as “create a service that transfers 100 new riders to work sites.” Second, some projects that do aim at results that could be quantified, such as serving trips or making customer contacts, are designed to fill transportation gaps for special populations and therefore cannot be expected to produce results comparable to those of other projects.

In the following analysis, the performance indicator used for trip-based projects is the actual or estimated number of rides (as measured by one-way trips) provided as a result of the project. The performance indicators used for information-based and capital investment projects are, respectively, information gathered and technology and vehicles acquired that impact availability of transportation

services. In all cases, the indicator is examined in terms of a project's realized goals as compared with its projected goals.

In addition to measuring the success of individual projects, this evaluation examined and drew general, qualitative conclusions from the information provided by project proponents on "lessons learned."

Recipient and Project Overview

As previously mentioned, 16 distinct entities were awarded JARC and New Freedom grants in solicitations occurring between 2008 and 2010. Diverse agencies have received funding. As Table 1 shows, private non-profits are the most common type of agency funded, followed by regional transit authorities (RTAs) and state agencies.

TABLE 1
Agencies Awarded Funds between 2008 and 2010

Agency Type	Number	% of Total
Area Agency on Aging (private non-profit)	2	13%
Municipality	2	13%
Private for-profit management company	1	6%
Private non-profit (other than Area Agency on Aging)	4	25%
RTA	3	19%
State agency	3	19%
Transp. Management Assoc. (TMA)	1	6%
Total	16	100%

Table 2 lists the entities along with the proportion of total funds awarded to each one. Note that 48% of the funds awarded is JARC funds; 52% is New Freedom. RTAs received nearly three-quarters (71%) of the JARC funds. RTAs also received almost one-third (31%) of the New Freedom funds. In total, RTAs received half (51%) of all funds awarded in the Boston Region MPO. A total of 37 grants were awarded in the solicitations held between 2008 and 2010. Several grants funded additional years of previously funded projects. Some agencies were awarded both JARC and New Freedom grants for the same projects (as a result, the total number of projects is less than the number of grants).

TABLE 2
Proportion of JARC and New Freedom Funds Awarded, by Agency

Agency	Agency Type	Total Grants Awarded	% JARC Funds	% New Freedom Funds	% Total Funds
128 Business Council	Private non-profit	1	2.5%	0.0%	1.2%
Acton	Municipality	1	0.3%	0.0%	0.2%
Cape Ann Transit Authority	RTA	1	2.4%	0.0%	1.2%
Cape Ann Transportation Operating Company	Private for-profit management company	1	0.0%	1.7%	0.9%
Department of Developmental Services	State agency	1	0.0%	2.3%	1.2%
Greater Attleboro-Taunton Regional Transit Authority	RTA	6	9.8%	3.8%	6.7%
Greater Lynn Senior Services	Area Agency on Aging, private non-profit	3	0.0%	14.6%	7.5%
Human Services Transportation Office (MA)	State agency	3	9.4%	11.6%	10.5%
Logan TMA	TMA	1	2.9%	0.0%	1.4%
Mission Hill Link	Private non-profit transportation agency	1	0.0%	2.9%	1.5%
Mystic Valley Elder Services	Area Agency on Aging, private non-profit	3	0.0%	10.3%	5.3%
MetroWest Regional Transit Authority	RTA	6	59.0%	27.7%	42.9%
New England Paralyzed Veterans of America	Private non-profit	2	0.0%	4.2%	2.2%
Office of Immigrants (MA)	State agency	1	0.3%	0.0%	0.2%
Salem/North Shore Career Center	Municipality	4	11.8%	11.0%	11.4%
SCM Community Transportation	Private non-profit transportation agency	2	1.6%	9.8%	5.8%
Total		37	100.0%	100.0%	100.0%

Table 3 lists the projects awarded, by funding program and by project type. To avoid double counting, two programs that were funded with both funding sources are listed under only one: the first Massachusetts Human Services Transportation Office project is listed here only under the New Freedom program; the Salem/North Shore Career Center project is listed only under JARC. The GATRA project in Pembroke is listed under both programs because it was set up with distinct components to be funded by each program.

TABLE 3
Summary of Projects by Type and Funding Program

Project Type	JARC	New Freedom	Total	% Total
Trip-Based	8	6	14	48%
Information-Based	4	7	11	38%
Capital Investments	2	2	4	14%
Total	14	15	29	100%
Percent Total	48%	52%	100%	

Table 4 presents the numbers of projects by funding program and indicates which of the service goals each project aims to achieve. Although several projects have multiple program goals, they are listed under the primary goal only. As one would expect, a majority of the JARC projects are trip-based (57%). The rest are either information-based (29%) or capital investments (14%). The most frequently occurring program goals are to expand geographic coverage (36%) and to improve access and/or connections (29%).

Almost half (47%) of the New Freedom projects are information-based; 40% are trip-based; 13% are capital investments. The most frequently occurring program goals are to expand geographic coverage (33%), to improve customer knowledge (27%), and to improve access and/or connections (20%).

**Table 4
Project Types by Funding Program and Service Goal**

JARC								
Project Type	Primary Project Goal						Total	Percent of Total
	Expanded Geographic Coverage	Extended Hours/Days of Service	Improved System Capacity	Improved Access/Connections	Improved Customer Knowledge	Planning for Services		
Trip-Based	5	1	0	2	0	0	8	57%
Information-Based	0	0	0	1	1	2	4	29%
Capital Investments	0	0	0	1	1	0	2	14%
Total	5	1	0	4	2	2	14	100%
Percent of Total	36%	7%	0%	29%	14%	14%	100%	

NEW FREEDOM								
Project Type	Primary Project Goal						Total	Percent of Total
	Expanded Geographic Coverage	Extended Hours/Days of Service	Improved System Capacity	Improved Access/Connections	Improved Customer Knowledge	Planning for Services		
Trip-Based	4	1	1	0	0	0	6	40%
Information-Based	0	0	0	2	4	1	7	47%
Capital Investments	1	0	0	1	0	0	2	13%
Total	5	1	1	3	4	1	15	100%
Percent of Total	33%	7%	7%	20%	27%	7%	100%	

Evaluations of Projects' Effectiveness

To determine how effective the trip-based projects have been, stated goals in terms of monthly trips served were compared with the numbers of monthly trips actually achieved. Table 5 presents this information. Note that goals are fairly modest; these grant programs were intended to fill transportation gaps and to serve specific populations that are often difficult to serve.

For the information-based and capital investment projects and planning studies, effectiveness was evaluated by comparing stated goals with realized goals, although the goals were generally not quantifiable.

The completed project profile forms, which are included in Appendix 2, provide additional information that cannot be quantified but provides valuable insights into project accomplishments. For example, Greater Lynn Senior Services' (GLSS's) program model has gained national recognition, and GLSS representatives have participated in a national webinar.

It should be noted that, because many New Freedom contracts resulting from the July 2010 solicitation were not signed until the fall of 2011, most of those projects were still in their initial stages when evaluation data were requested.

Trip-Based Projects

Four trip-based projects were found to be effective. Of these four projects, two, the Route 1 Shuttle and the East Marlborough Shuttle (both JARC), have met or exceeded projections. Two others, the South Side Shuttle (JARC) and the Logan Sunrise Shuttle North Extension (both also JARC) have almost met their goals. Four projects, all of which are funded by the New Freedom grant program (one is funded by both programs) were not effective, having missed goals by large margins.

In terms of reaching goals, the most effective projects are operated by a regional transit authority (note that two RTAs did not report) and Transportation Management Associations. These entities are experienced transportation providers who generally know their markets. Most of the least effective projects are operated by private non-profits that are new to the transportation field.

Three projects could not be evaluated as they are still in initial stages or were not initiated. There was no response from the Greater Attleboro-Taunton Regional Transit Authority, which operates four projects.

Information-Based and Capital Investment Projects and Planning Studies

Table 6 presents projected and realized goals for planning studies and mobility management projects that either did not have quantifiable goals or are equipment

Table 5
Projected and Realized Goals for Trip-Based Projects *

Agency	Project	JARC	New Freedom	Projected Trips	Actual Trips
128 Business Council	South Side Shuttle	✓		500 one-way trips/month	416 one-way trips/month
Acton	Accessible Taxi Voucher Program		✓	Project was never initiated	
Cape Ann Transportation Operating Company	Medical Healthlink Shuttle		✓	160 one-way trips/month	31 one-way trips/month ¹
Department of Developmental Services	Self-Advocate Transportation Project		✓	100 one-way trips/month	Project is still in initial stages
Greater Attleboro-Taunton Regional Transit Authority	Transit Service for Low-Income Workers in Franklin and Bellingham	✓			Did not respond
Greater Attleboro-Taunton Regional Transit Authority	Extend Demand Response Service Hours and Operate a Peak Period Shuttle from Pembroke to a Commuter Rail Station	✓	✓	750 one-way trips/month	Did not respond
Greater Attleboro-Taunton Regional Transit Authority	Enhanced Demand Response Services to Medical Facilities		✓	200-300 one-way trips/month	Did not respond

(continued)

* Data collected in early 2012.

Table 5 (cont.)
Projected and Realized Goals for Trip-Based Projects

Agency	Project	JARC	New Freedom	Projected Trips	Actual Trips
Greater Attleboro-Taunton Regional Transit Authority	Norfolk Area Shuttle	✓		17,798-18,217 one-way trips/month	Did not respond
Logan TMA	Logan Sunrise Shuttle Extension	✓		180 one-way trips/month	150 one-way trips/month ²
Mission Hill Link	Mission Hill Link (purchase accessible vehicle and CharlieCard integration equipment)		✓	400-500 additional one-way trips/month	Project is still in initial stages
MetroWest Regional Transit Authority	Route 1 Shuttle from the Woodland MBTA station to MetroWest	✓		2,080 one-way trips/month	2,421 one-way trips/month
MetroWest Regional Transit Authority	East Marlborough Service	✓		1,584 one-way trips/month	1,936 one-way trips/month
MetroWest Regional Transit Authority	Expanded Medical Trips		✓	128 one-way trips/month	5 one-way trips/month ³
New England Paralyzed Veterans of America	NEPVA Transportation Program		✓	150 one-way trips/month	11 one-way trips/month ⁴
Salem/North Shore Career Center	North Shore – Employment Express and Mobility Management Services (first year)	✓	✓	287 one-way trips/month (average)	59 one-way trips/month ⁵

(continued)

**Table 5 (cont.)
Projected and Realized Goals for Trip-Based Projects**

Agency	Project	JARC	New Freedom	Projected Trips	Actual Trips
Salem/North Shore Career Center	North Shore – Employment Express and Mobility Management Services (second year)	✓	✓	735-1,225 one-way trips	243 one-way trips/month ⁶

¹ Estimated from 7-month total

² After 4.5 months of service

³ Project began in November 2011

⁴ 9-month average

⁵ 5-month average

⁶ 1- month average

Table 6
Projected and Realized Goals of Information-Based and Capital Investment Projects and Planning Projects*

Agency	Project	JARC	New Freedom	Projected Goal(s)	Realized Goal(s)
Cape Ann Transportation Operating Company	Interactive Voice Response System		✓	Improve customer relationships by using ITS technologies	Did not respond
Greater Lynn Senior Services	Reaching Beyond Borders (3 phases) (Realized goals are for 2nd phase.)		✓	Coordinate and make accessible to consumers all available and potential mobility resources.	Has learned to tailor outreach component to specific groups; has started to integrate mobility management at the local health center and medical practices. Doctors now refer patients for travel training. The program's model has gained national recognition and the agency has conducted webinars at the national level. The agency has made 1,200 customer contacts
Human Services Transportation Office (MA)	Evaluation and Planning Study of the Brokerage System		✓	Evaluate the current HST brokerage system to optimize efficiencies and identify opportunities for more effective and coordinated mobility management functions.	Consultants produced five reports and concluded that the brokerage system provides quality, cost-effective services with a high level of involvement of state-level human service agencies in the coordination of client transportation services.

(continued)

* Data collected in early 2012.

Table 6 (cont.)
Projected and Realized Goals of Information-Based and Capital Investment Projects and Planning Projects

Agency	Project	JARC	New Freedom	Projected Goal(s)	Realized Goal(s)
Human Services Transportation Office (MA)	Mobility Management Information Network	✓	✓	Build the capacity to support existing local and regional mobility management efforts and improve communications and coordination among a wide range of agencies.	In initial stages
Massachusetts Office for Refugees and Immigrants	Mobility Management	✓		Design a mobility management program to provide transportation services to low-income refugees and immigrants seeking seasonal farm work	Did not respond
MetroWest Regional Transit Authority	Enhanced Client Communication Technology		✓	Enhance access to transportation by allowing consumers to control their own accounts	Equipment has been ordered

(continued)

**Table 6 (cont.)
Projected and Realized Goals of Information-Based and Capital Investment Projects and Planning Projects**

Agency	Project	JARC	New Freedom	Projected Goal(s)	Realized Goal(s)
MetroWest Regional Transit Authority	Mobility Manager		✓	Enhance service coordination	Strengthened connections through signage and service coordination, worked with WRTA to reduce paratransit trip transfers; overall ridership has increased by 36% since position was created.
MetroWest Regional Transit Authority	Purchase Vehicles	✓		Purchase vehicles for the Route 1 service	Vehicles purchased and in service.
MetroWest Regional Transit Authority	Transit Technology Suite	✓		Increase public transit catchment area by increasing route deviation	Equipment has been ordered
Mystic Valley Elder Services	Mystic Valley Connect-a-Ride Alliance		✓	Contract with GLSS to develop a coordinated transportation alliance and central call-a-ride mobility management system; launch a volunteer transportation program	A coordinated transportation alliance and the One-stop call-a-ride center have been established. Provided 264 volunteer driver trips.
New England Paralyzed Veterans of America	Accessible Vehicle		✓	Purchase an accessible vehicle	Vehicle purchased and in service

Table 6 (cont.)

Projected and Realized Goals of Information-Based and Capital Investment Projects and Planning Projects

Agency	Project	JARC	New Freedom	Projected Goal(s)	Realized Goal(s)
SCM Community Transportation	Access to Success	✓		To identify, rank and prioritize employment transportation barriers, to launch a small pilot addressing identified gaps, design a program that routinely convenes stakeholder organizations	Employers did not participate after 2008 economic downturn. Project rescoped to identify small-scale efforts that would identify immediate benefit to workers in a much smaller area. Did not convene stakeholders.
SCM Community Transportation	Cambridge in Motion		✓	Strengthen the mobility management framework and reach out to encourage mobility management practices and facilitate solutions to transportation barriers	Project still in initial stages

related. All of the responding agencies except for SCM Community Transportation met their projected goals: they bought vehicles or other equipment, conducted planning studies, provided travel counseling, or coordinated with other agencies. SCM Community Transportation has been a transportation provider for years but is new to conducting planning studies. The agency did not meet any of its projected goals and decided it was underfunded. Two agencies did not respond, and two projects are in the initial stages.

General Findings

Successful Projects

All measures of effectiveness that were considered indicate that the most successful projects are operated by entities that both know their markets and have a history of serving them in some capacity. They have either conducted preliminary planning studies before applying for funding or as the first phase of a project, or already routinely plan for and provide transportation services.

For example, as both federal and state designated Area Agencies on Aging, Mystic Valley Elder Services (MVES) and GLSS are mandated to conduct regular needs assessments to identify barriers their consumers face and are therefore familiar with the requirements of their markets. The first phase of GLSS's Reaching Beyond Borders project was designed to develop strategies for addressing transportation barriers and gaps; to develop transportation options for traveling within the service area; and to develop a coordinated plan for managing mobility among service areas. MVES used the first phase of its project to determine which volunteer driver program best suited its purposes. The Route 1 shuttle was originally funded as a Congestion Management and Air Quality Program project. The East Marlborough project evolved from a transit study.

Less Successful Projects

The Cape Ann Transportation Operating Company (CATOC) and SCM Community Transportation have operated transportation services for years, but they generally offer services contracted by others. They do not have planning experience. New England Paralyzed Veterans of America (NEPVA) has not planned for or offered transportation services; however, it falls into the category of agencies that fill important transportation gaps.

Agencies such as these, without experience in planning and/or operating transportation services, should not be categorically ruled out from receiving funding. Perhaps they can be helped to develop projects that have meaningful results. For example, the MPO might consider conducting pre-proposal workshops to provide technical assistance to entities with good ideas but with

little or no experience planning or operating services. Information from “lessons learned” can also be shared at these workshops.

Recipient-Identified Lessons Learned

The project profile sheet sent to all program recipients requested a statement of lessons learned from conducting their projects. The following is a summary of responses.

- Routes that are too long temporally and geographically decrease potential ridership.
- Transportation needs expressed by potential riders do not always reflect trips they will actually make.
- Agencies need to accommodate the business community to ensure that services meet the needs of commuters.
- Facilitating the transfer from the use of paratransit to the use of fixed-route transit for those who are able to use the latter reduces agency costs and allows individuals to control their own travel.
- Partnering with other organizations can help build awareness of the services.
- Know your market.
- Perform in-depth studies and surveys prior to launching future routes.
- Marketing is important. Marketing associated with the introduction of the new route has helped increase ridership on the existing route.
- The most important lesson learned through both travel counseling and community education sessions is that mobility management is about more than just a ride. (A host of issues have to be addressed.)
- Physicians are eager to have travel counseling on-site so they can easily refer caregivers and consumers.
- Coordinated scheduling is more challenging than anticipated because service providers still think that pooling services and/or sharing customers will result in a net loss for them.
- Brokerage transportation systems have the capability of achieving more enhanced coordination and cost efficiencies than stand-alone systems. However, these systems require a committed level of oversight to ensure service quality is not compromised in the pursuit of savings.

From the above, it appears that the dominant theme is that an agency has to be aware of the needs and desires of its potential market. Studies and surveys prior to initiating service yield a more successful service.

Completing This Evaluation Process and Conducting Future Solicitations

Since a number of projects are still in their initial stages, it would be advisable to evaluate them one to two years from now.

In future solicitations, major considerations in determining which entities will be funded should include whether the entity has conducted a preliminary planning study for its proposal (or will conduct one as the first step of its proposed project), whether it has transportation experience or experience offering services of another kind, and whether it has knowledge of the targeted market. If a proponent has neither planning nor operating experience but is an organization with unique needs and a viable proposal, the MPO should provide it with technical support in preparing its application.

Proponents for projects other than marketing studies should be able to identify in their applications the unmet needs of their target populations and how their projects will address these needs.

Proposed projects that serve social service needs often cannot have strictly quantifiable goals and standards, and the MPO's solicitations and evaluations should continue to assess such projects using nonquantified measures.

APPENDIX 1

Reporting Packet



BOSTON REGION METROPOLITAN PLANNING ORGANIZATION

MEMORANDUM

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and MPO Chairman

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The Boston Region MPO is composed of:

Massachusetts Department of Transportation
Metropolitan Area Planning Council
Massachusetts Bay Transportation Authority Advisory Board
Massachusetts Bay Transportation Authority
Massachusetts Port Authority
Regional Transportation Advisory Council
City of Boston
City of Beverly
City of Everett
City of Newton
City of Somerville
City of Woburn
Town of Arlington
Town of Bedford
Town of Braintree
Town of Framingham
Town of Lexington
Town of Medway
Town of Norwood
Federal Highway Administration (nonvoting)
Federal Transit Administration (nonvoting)

DATE February 6, 2012

TO Job Access and Reverse Commute (JARC) and New Freedom Award Recipients

FROM Alicia Wilson
Boston Region Metropolitan Planning Organization (MPO)

RE Performance Evaluation of JARC and New Freedom Projects in the Boston MPO

In January 2012, the Boston Region MPO approved a study to evaluate JARC and New Freedom Projects funded in its area. The objectives of this study are:

- To determine how effective funded projects have been in accomplishing proposed objectives.
- To use this information to identify future projects to recommend.
- To encourage the use of best practices.
- To use this information to update the Coordinated Public Transit Human-Services Transportation Plan.

MassDOT is aware of this evaluation and is invested in the results. They plan to use this information to develop a system to track the various statistics for all JARC and New Freedom grantees in Massachusetts from this point forward. Note that much of this data request is not new since each MassDOT contract with you includes performance measures.

The enclosed package includes a service/project profile worksheet, performance measure matrices, and a glossary of terms. The performance measure matrices are based on those used in a Federal Transit Administration sponsored evaluation of JARC and New Freedom program services. For each of your projects, please submit a matrix for each fiscal year during which you provided service. Fill out the unshaded portions for each service/project type that applies. A glossary of terms is included for your information. Electronic copies of all forms will be e-mailed to you shortly.

All requested information should be submitted by e-mail or US mail by March 16, 2012 to:

Alicia Wilson
Boston Region MPO
10 Park Plaza, Suite 2150
Boston, MA 02116
awilson@bostonmpo.org

Please refer technical questions to me at the above e-mail address or at (617) 973-8008.

JC/AW/aw

Encl.

Cc: Joanne Champa, Program Coordinator, MassDOT

GLOSSARY

Capital investment projects, include facilities and infrastructure to support transportation services.

Expanded geographic coverage, includes increasing the coverage area for a service (typically for trip-based or capital investment projects).

Extended hours or days of service, includes adding hours and/or days to existing services (typically for trip-based or capital investment projects).

Information-based services, provide information about transportation services to individuals but do not provide direct transportation services. Examples are providing one-on-one training that teaches an individual how to use fixed route bus service or provides instruction on how to care for and maintain a vehicle. Trip/itinerary planning is another specific form of assistance that provides individual assistance.

Improved system capacity, includes adding resources that result in additional quantities of service (typically for trip-based or capital investment projects).

Improved access or improved connections, includes projects that improve an individual's ability to travel (typically trip-based services but also some information-based services such as mobility managers or capital investment projects such as vehicle loan programs).

Improved customer knowledge, provides additional resources for information-based services especially customer information and training programs.

Trip-based services, provide transportation directly to individuals.

**Table-1
JARC Service Matrix**

PRIMARY SERVICE GOAL AND OUTPUT MEASURE (select one per JARC-funded service)					
JARC-FUNDED SERVICE	(A) Expanded Geographic Coverage	(B) Extended Hours/Days of Service	(C) Improved System Capacity	(D) Improved Access / Connections	(E) Improved Customer Knowledge
I. Trip-Based Services					
1. Fixed route	# one-way trips	# one-way trips	# one-way trips	# one-way trips	
2. Flexible routing	# one-way trips	# one-way trips	# one-way trips	# one-way trips	
3. Shuttle / feeder services	# one-way trips	# one-way trips	# one-way trips	# one-way trips	
4. Demand response	# one-way trips	# one-way trips	# one-way trips	# one-way trips	
5. User-side subsidy / vouchers	# one-way trips	# one-way trips	# one-way trips	# one-way trips	
6. Vanpool*			# one-way trips	# one-way trips	
II. Information-Based Services					
1. Mobility manager				# customer contacts	
2. One Stop Center / referral					# customer contacts
3. Trip / itinerary planning					# customer contacts
4a. One-on-one transit training (travel training)					# persons trained
4b. Transportation resource training (group training)					# persons trained
5. Internet-based information					# customer contacts
6. Information materials / marketing					descriptive
III. Capital Investment Projects					
1. Vehicle for individual				# vehicles / # trips	
2. Vehicle for agency	# vehicles added / # trips	# vehicles added / # trips	# vehicles added / # trips		
3. Vanpool*			# vehicles added / # trips	# vehicles added / # trips	
4. Car-sharing	# vehicles added / # trips		#vehicles added / # trips		
5. ITS-related hardware /software improvements			descriptive	descriptive	descriptive
6. Other capital projects	descriptive	descriptive	descriptive	descriptive	descriptive

* If vanpool vehicles were purchased during the report year, report under Category III capital investment. If vanpool vehicles were not purchased, report under Category I trip-based.

Project Name _____

Reporting Year _____

**Table-2
New Freedom Service Matrix**

PRIMARY SERVICE GOAL AND OUTPUT MEASURE (select one per New Freedom-funded service)					
NEW FREEDOM-FUNDED SERVICE	(A) Expanded Geographic Coverage	(B) Extended Hours/Days of Service	(C) Improved System Capacity	(D) Improved Access / Connections	(E) Improved Customer Knowledge
I. Trip-Based Services					
1. Fixed route					
2. Flexible routing					
3. Shuttle/feeder service	# one-way trips	# one-way trips		# one-way trips	
4a. Expanded ADA paratransit service ^o	# one-way trips	# one-way trips		# one-way trips	
4b. Same-day ADA paratransit service ^o				# one-way trips	
4c. Door-to-door or door-through-door ^o				# one-way trips	
4d. Volunteer driver program				# one-way trips	
5. User-side subsidy/ vouchers ^o (e.g., taxis)				# one-way trips	
6. Vanpool*			# one-way trips	# one-way trips	
7. Aide/escort assistance ^o				# one-way trips	
II. Information-Based Services					
1. Mobility manager*+				# customer contacts/# trips	
2. One Stop Center/referral					# customer contacts
3. Trip/itinerary planning					# customer contacts
4a. One-on-one transit training (travel training)					# persons trained
4b. Transportation resource training (group training)					# persons trained
5. Internet-based information					# customer contacts
6. Information materials/marketing					descriptive
7. Driver training (for individuals)					# persons trained

Project Name _____

Reporting Year _____

**Table-2 (continued)
New Freedom Service Matrix**

NEW FREEDOM-FUNDED SERVICE	(A) Expanded Geographic Coverage	(B) Extended Hours/Days of Service	(C) Improved System Capacity	(D) Improved Access / Connections	(E) Improved Customer Knowledge
III. Capital Investment Projects					
1. Vehicle for individual				# vehicles / # trips	
2a. Vehicle for transit agency ^o	# vehicles added / # trips	# vehicles added / # trips	# vehicles added / # trips		
2b. Vehicle for other agency ^o	# vehicles added / # trips	# vehicles added / # trips	# vehicles added / # trips		
2c. Accessible taxis ^o	# vehicles added / # trips	# vehicles added / # trips	# vehicles added / # trips		
3. Vanpool vehicles*			# vehicles added / # trips	# vehicles added / # trips	
4. Car-sharing	# vehicles added / # trips		# vehicles added / # trips		
5. ITS-related software/hardware improvements			descriptive	descriptive	descriptive
6a. Elevators ^o				# added / descriptive	
6b. Large capacity WC lifts added to vehicles ^o				# added / descriptive	
6c. WC securement areas added to vehicles ^o				# added / descriptive	
6d. Other infrastructure improvements ^o	descriptive	descriptive	descriptive	descriptive	descriptive

^o Beyond service required by the ADA.

* If vanpool vehicles were purchased during the report year, report under Category III capital investment. If vanpool vehicles were not purchased, report under Category I trip-based

Project Name _____

Reporting Year _____

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity _____

Address _____

Entity Type _____

Project Name _____

Date Funds Awarded _____

Total Funds Awarded _____

Date Project Began _____

Date Projected Ended _____

Primary Service/Project Goal _____

Service/Project Description _____

Major Accomplishments _____

How is the Service/Project Evaluated? _____

Lessons Learned _____

**Use additional pages if needed.*

APPENDIX 2

Project Profiles

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity Cape Ann Transportation Operating Company, Inc.

Address 3 Rear Pond Road

Gloucester, MA 01930

Entity Type New Freedom Grant – Trip Based Services – Expanded ADA
paratransit service

Project Name Healthlink Medical Shuttle

Date Funds Awarded July 1, 2011

Total Funds Awarded \$59,885.00

Date Project Began August 1, 2011

Date Projected Ended July 31, 2011

Primary Service/Project Goal Provide medical transportation to ADA clients outside normal
geographical area

Service/Project Description Paratransit trip based door to door service to ADA individuals
going to medical appointments and/or treatments to medical
facilities in other cities and towns outside Cape Ann
Transportation Authority's respective geographical area. The
service provided a link to several medical campuses.

Major Accomplishments The service has filled a void for individuals lacking
transportation to medical facilities outside Cape Ann's
member communities.

How is the Service/Project Evaluated? The project was to be evaluated based on the "number of
trips." However, to date, trips have fallen short of projections.
It has been determined that additional advertising is necessary
coupled with informational meetings at the Rose Baker Senior
Center and SeniorCare in Gloucester as well as the Councils on
Aging in the Towns of Rockport, Essex and Ipswich.

Lessons Learned _____ **Prior to launching future paratransit routes, I feel more in**
depth studies and surveys need to be undertaken establishing
needs.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity Greater Lynn Senior Services, Inc.

Address 8 Silsbee Street, Lynn, MA 01901

Entity Type Area Agency on Aging; private non-profit

Project Name Reaching Beyond Borders

Date Funds Awarded Phase 1: January 15, 2010; Phase 2: October 18, 2010

Total Funds Awarded Phase 1: \$144, 219; Phase 2; \$179,698

Date Project Began Phase 1: January 15, 2010; Phase 2: October 18, 2010

Date Projected Ended Phase 1: December 31, 2010; Phase 2: ongoing

Primary Service/Project Goal Please see attached page.

Service/Project Description Please see attached page.

Major Accomplishments Please see attached page.

How is the Service/Project Evaluated? Please see attached page.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE (ADDITIONAL PAGE)

Greater Lynn Senior Services, Reaching Beyond Borders

Primary Service/Project Goal

The first two years of Reaching Beyond Borders were designed to facilitate coordination of existing transportation resources, identify resource gaps and develop strategies for closing them, and enhance consumer capacities for effectively accessing and using transportation options. Specifically, we sought to develop an interactive transportation resource database designed to facilitate Travel Counseling for consumers, to provide consumer education to develop their capacity to manage their transportation needs accessing resources from existing transportation options, and to pilot scheduling software to coordinate trips and resources among participating transportation providers. The vision has been to develop a capacity that will coordinate existing transportation options as well as identify and launch the most appropriate mechanisms for addressing transportation gaps in ways that are truly consumer-centered.

Service/Project Description

Reaching Beyond Borders is a mobility management project that coordinates and integrates area transportation options and makes these accessible to consumers through the 800 travel counseling line, community education presentations and workshops, and coordinating scheduling and trips. Consumers are and adults with disabilities who cannot access or effectively use existing transportation options – including those for whom no meaningful options exist – and who are living in the North Shore area communities of Lynn, Lynnfield, Nahant, Saugus, Swampscott, Danvers, Salem, Beverly, Peabody, Marblehead, Middleton, Melrose, Wakefield, Stoneham, Reading, and North Reading. The project brings together a wide variety of community stakeholders and advocates who comprise the regional On the Move! Coalition which operates under the aegis of the Aging Disabilities Resource Consortium of the Greater North Shore (ADRCGNS).

Major Accomplishments

We are excited to report that the project has been very successful not only in the areas we had hoped but in unanticipated ways as well. Through 16 community presentations, we have reached more than 200 consumers, providing them with information on the travel counseling 800 number, transportation planning, and transportation options. We have served over 100 callers through the travel counseling 800 number. Additional outreach has been provided through staff participation in five health fairs reaching an estimated additional 300 consumers. As we expanded our initial pilot's region we held a launch in Beverly that impressively included a wide array of key leaders and movers and shakers. This presentation seems to have had significant impact, increasing both the number of travel counseling calls received from this area, as well increasing key stakeholder interest in having additional educational presentations for consumers in their communities. Through our effort to meet consumers where they live and socialize –

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE

congregate housing, suburban housing complexes, community centers, health fairs in parks -- we have been able to penetrate diverse communities representing a wide range of consumers with varying sociodemographic profiles and transportation needs. A key accomplishment has been learning to tailor our outreach and educational presentations to specific consumer groups depending on their socioeconomic status, education, driving status, geographic community in terms of rural, suburban, urban differences, etc.

Beyond community presentations, we are thrilled to have been able to begin to integrate mobility management into our innovative embedded service provision at the local community health center as well as physician group practices. In these settings trained travel counselors, who are also options counselors, incorporate travel counseling into their appointments with consumers as well as their meetings and conversations with health providers at these sites. Physicians are now referring caregivers and consumers with transportation issues to our on-site staff for travel counseling. We have also integrated our program into the ongoing regional care transitions efforts. Trained transition coaches provide their consumers with mobility management program information including the brochure and refrigerator magnet, which has the travel counseling number on it.

A surprising accomplishment is that our program model's impact has extended far beyond our own targeted communities and has gained national recognition. We were invited to present at several regional and national venues including: New Hampshire's, Granite State Independent Living transportation planning meeting, June 2011; Massachusetts Home Care Association's Annual Meeting, September, 2011; National Association of Area Agencies on Aging (n4a) Annual Conference, Washington, DC, July 2011; and American Society on Aging's Annual Conference, San Francisco, CA, March 2011. We have received positive feedback at each presentation. What seems to resonate most is a video clip we incorporate in our presentations depicting a travel counseling call in which a consumer, Sophie, calls initially about her need for a ride to a doctor's appointment. However, using motivational listening and options counseling techniques, the travel counselor is able to learn from Sophie that she has other needs in addition to a ride, including chronic pain and disease self management, medical advocacy, and social inclusion. Within five minutes of conversation the travel counselor has shared with Sophie not only transportation options but also, additional information on companion, medical advocacy, and chronic disease self-management programs in the area. This video had such an impact that at the San Francisco conference we were surprised and delighted to be told by one of the session's participants, who had been in the transportation field for more than 15 years, that she would now start using our language and refer to their work as travel counseling.

Most exciting was the national webinar we were invited to give. *Innovations in Mobility Management: Lessons from the ADRCGNS' Mobility Links Program* was presented in a creative talk radio format with Administration on Aging (AoA) and the National Center for Senior Transportation (NCST) in November 2011. More than 500 participants joined this webinar and had access to further program information through an internet link with video of the travel counseling process.

Perhaps the most interesting and provocative accomplishment has been the paradigm shift away from a simple demand/response mode of transportation service provision to the idea -- and now our practice -- that transportation is more than about just a ride, it is about the journey. That travel counseling is about not only providing transportation options but also journeying with the

consumer to help identify additional supports to increase their mobility so that they can become less isolated and have a more meaningful life, is perhaps our greatest accomplishment.

How is the Service/Project Evaluated

The travel counseling component includes an ACCESS database into which data from every call is entered. This data is reviewed quarterly by the team. Patterns are identified and discussed in terms of what is working well but also what needs to be further strengthened. A travel counseling protocol has been developed and is used to train and guide the counselors to ensure that all key areas of inquiry are explored with each consumer including special transportation needs they may have such as service animal accompaniment, oxygen and wheelchair accommodation, anxiety traveling alone, etc. Travel counselors provide follow-up calls and will be soon be doing this more systematically. Project staff meet weekly to discuss call rates, patterns, and to identify unusually challenging cases so that the team can troubleshoot and provide support to one another. Community presentations include a consumer transportation needs survey as well as a presentation feedback form which are both analyzed so that we can continually assess consumer need and be sure we are responding appropriately to the specific consumer needs of that community. We also have observers designated to take notes and summarize key findings in debriefing sessions with project staff following each presentation. Because we track where calls are coming from and how callers found out about the number, we know if specific presentations or participation in health fairs generated calls. In the pilot scheduling program (see below), we will be collecting and tracking data on providers and consumer use in terms of number of rides, routes, consumer satisfaction, etc.

Lessons Learned

Perhaps the most important lesson learned through both the travel counseling and community education sessions is that mobility management is about more than just a ride. It is about increasing community livability, which means growing awareness of and access to community resources through developing meaningful relationships that support consumers in the lifestyle they choose. As we mentioned above, in our program we now say, it is not just about the ride, it is about the journey. The Sophie video that is shown in all presentations resonates with consumers and providers alike, locally as well as nationally. What Sophie represents is not only a woman wanting a ride to her doctor's appointment. It is about a woman who has become socially isolated because her sister, who used to drive and accompany her to doctors' appointments, has moved away leaving Sophie isolated, lonely, and afraid. It is about a woman who needs resources to help her manage her chronic conditions but most importantly, a woman who wants relationships through which she can access the resources she needs to have quality of life including transportation, companionship, pain management – and, be part of a community where she experiences a sense of belonging and purpose.

Through our embedded program discussed above, we are learning that physicians are eager to have travel counseling on-site so that they can refer caregivers and consumers easily. We are also learning that driving cessation is an issue not only for consumers but is also of great concern to health care providers and that both consumers and providers need education to help them plan for when they can no longer

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE

drive. We are learning the value of working with consumers to decrease their anxiety around driving cessation and are planning to incorporate assistive technology such as It's Never Too Late (IN2L) computer systems into the program as we go forward. IN2L would allow consumers and caregivers to perform self-assessment in terms of driving ability through driving games and simulation exercises. This would teach them how to identify red flags that may indicate their need to alter current driving patterns and consult with providers and driving programs for additional support.

We have learned that the coordinated scheduling project component is more challenging than we had anticipated primarily because there remains a dominant narrative among providers that pooling transportation and/or sharing customers will result in a net loss. The focus on expanding the numbers of rides rather than understanding the nature of the ride makes collaboration more difficult. Our research demonstrates that while rides can and should be far better coordinated, coordination needs to be based on rigorous needs assessment that includes understanding the Sophie experience which is more than how she must get from point A to point B. We have developed a pilot with Mystic Valley Elder Services (MVES) to determine the real viability and cost of coordinating scheduling between existing providers including developing a toolkit to help market the concept and service to providers, etc. We are working to demonstrate to providers that coordinating scheduling will increase their revenue and/or lower their costs. Although challenging, we are making progress through this collaboration and anticipate learning more about what works best in terms of cultivating and sustaining cooperation between area providers.

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Executive Office of Health and Human Services – Human Service
Transportation Office

Address: 100 Hancock St., Quincy, MA 02171

Entity Type: State Agency

Project Name: Evaluation & Planning Study of Massachusetts' Human Service Transportation Brokerage

Date Funds Awarded: ISA with MassDOT executed 12/29/09

Total Funds Awarded: \$96,000 New Freedom

Date Project Began: January 2010

Date Projected Ended: September 2010

Primary Service/Project Goal:

Evaluation of the current HST brokerage system to optimize efficiencies and identify opportunities for more effective and coordinated mobility management functions within Greater Boston and throughout the state.

Service/Project Description:

EOHHS, through its HST Office, shall engage a consultant to:

- (a) Review the current HST brokerage system to identify strengths and weaknesses and make recommendations to modify the current regional model;
- (b) Identify potential refinements to the HST system and strategies to maximize efficiency for broker management and operations, allow for potential brokerage expansion, strengthen access to public transit options, improve coordination with existing community, regional and state transportation services, and incorporate mobility management tools;
- (c) Provide a framework for integrating the HST brokerage within a broader statewide effort to support local and regional transportation coordination and mobility management for transportation-disadvantaged populations.

Major Accomplishments:

EOHHS conducted a competitive procurement and selected TranSystems to conduct the study. They produced five reports: literature review, stakeholder interviews and broker site visits, analysis of broker management, evaluation of HST Area Advisory Councils (HSTAACs) and alternative brokerage models

Overall, the consultants concluded that the HST brokerage system provided quality, cost-effective services with a high level of proactive involvement of state-level human service agencies in the coordination of client transportation services. The cost savings incentive program has been highly successful in controlling MassHealth (Medicaid) demand-response (PT-1) transportation costs. More opportunities for improvements exist however, especially in implementing identified broker best practices statewide and a potential role in mobility management. Any potential modification to the current broker model would need to be developed through a procurement process and closely evaluated on a number of factors.

In FY11, the HST brokerage system expanded to include two new agencies, maintained stable trip costs overall and provided 116,829 additional MassHealth demand response trips for \$171,797 fewer dollars than the previous year. The Office also developed an expanded website to serve as an information resource for consumers and agencies on community transportation options and coordination initiatives.

A re-procurement of the brokerage system is scheduled for FY13, in which consultant recommendations to further enhance efficiencies and incorporate mobility management strategies will be included.

How is the Service/Project Evaluated?

A performance-based contract with the consultant was established and payment made only upon acceptance of the reports by the HST Office. Because a final executive summary report was not produced, EOHHS/HST Office returned \$5,094 to MassDOT.

Lessons Learned:

Brokerage transportation systems have the capability of achieving more enhanced coordination and cost efficiencies than stand-alone systems as evidenced by both HST's own data and the consultant report's conclusion on the Massachusetts HST system. However these systems require a committed level of oversight to ensure service quality is not compromised in the pursuit of savings.

The consultants identified additional opportunities for implementing identified broker best practices statewide, maximizing economies of scale while maintaining service quality standards, continuing to build on the partnership between EOHHS and MassDOT, and supporting local mobility management efforts.

NOTE: Since this was a planning study, the performance measures matrix was not applicable.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Executive Office of Health and Human Services – Human Service
Transportation Office

Address: 100 Hancock St., Quincy, MA 02171

Entity Type: State Agency

Project Name: Mobility Management Information Network Pilot

Date Funds Awarded: ISA with MassDOT executed 11/18/11 for JARC funds (NF funding is pending)

Total Funds Awarded: \$299,986 JARC & \$299,986 New Freedom

Date Project Began: December 2011

Date Projected Ended: June 2014

Primary Service/Project Goal:

The goal of this project is to build the HST Office's capacity to support existing local and regional mobility management efforts and improve communications and coordination among a wide range of state and local agencies, community service providers, transit, planners, community advocates, and consumers.

Service/Project Description:

1. Build and maintain an online information hub on mobility management and community transportation coordination, posted on a revamped HST website, for all areas served by the Boston Region Metropolitan Planning Organization (MPO) and ultimately statewide.
2. Create a community transportation outreach and networking component; integrating a Transportation Solutions Coordinator (TSC) and a restructured Human Service Transportation Area Advisory Council (HSTAAC) stakeholder group in areas served by the Boston MPO.
3. Initiate planning and technical assistance focusing on transportation barriers and best practices to improve mobility management information sharing and networking in the Boston MPO area and statewide.

Major Accomplishments:

The project began in December 2011 and a Mobility Information Specialist has been hired. Upon receipt of the New Freedom funds we will proceed with hiring a Mobility Outreach Coordinator.

Just since December 2011, the HST Office has developed additional resource materials at www.mass.gov/hst and for distribution to various audiences, facilitated a website workgroup with stakeholders from coordination teams across the state, participated in outreach events targeting veterans and veteran serving agencies, conducted research on available transportation inventories and on interactive mapping, and participated in numerous local, regional and state level meetings to facilitate collaboration on transportation issues.

How is the Service/Project Evaluated?

Quarterly performance reporting to MassDOT, with the first report due in April 2012. OPermanec matrix data will be available after year one of the project.

Lessons Learned:

TBD

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity Logan Airport Employee TMA

Address One Harborside Drive, Suite 200S

East Boston, MA 02128

Entity Type Transportation Management Association

Project Name Logan Sunrise Shuttle North Extension

Date Funds Awarded September 1, 2011

Total Funds Awarded \$92,984

Date Project Began Shuttle service began on October 24, 2011

Date Projected Ended Ongoing for 3 years

Primary Service/Project Goal To expand the operation of the Logan Sunrise Shuttle in East Boston to Orient Heights, providing transit to Logan employees during hours when the MBTA does not operate.

Service/Project Description Addition of a second Sunrise Shuttle route following the approximate route of the MBTA #120 bus through Orient Heights.

Service operates between 3 am and 6 am at 30 minute headways. The route connects Orient Heights with Logan terminals via Bennington St. and route 1A.

Major Accomplishments Service launched on October 24, 2011.

Ridership has been slowly increasing each month so far.

How is the Service/Project Evaluated? The TMA tracks the following: passengers per trip, total passenger ridership, cost per passenger trip.

Lessons Learned Marketing associated with introduction of the new route has helped increase ridership on the existing route.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: JARC East Marlborough Service

Date Funds Awarded: 10/26/10

Total Funds Awarded \$887,250

Date Project Began 10/31/10

Date Projected Ended: On going – through 8/13/13

Primary Service/Project Goal: To provide service along the Route 20 corridor in Marlborough, MA. This corridor is a heavily developed with many multi-family apartment complexes and retail establishments. The service would be coordinated with other MWRTA services to facilitate transfers throughout the region.

Service/Project Description: The fundamental concept for the service was based on a CTPS MWRTA service recommendation. The proposed JARC East Marlborough project would provide service in a densely developed area of Marlborough with many retail and service jobs as well as multi-family apartment buildings. MWRTA attended UMass Work Without Limits Conference in 2009 during which time regional teams of people interested in transportation met to prioritize and implement key projects. The Metrowest team identified the East Marlborough service as the top transportation need in our region. Members of the team included business representatives, social service employment agencies, social workers and the MWRTA. The MWRTA applied for a JARC grant to fund the project with significant local support. In addition to the JARC award, the MWRTA team was also awarded a competitive grant through the Work without Limits program to help people with disabilities access employment. The grant, which has been used for training and support of services on all MWRTA routes, has had a specific emphasis on the new East Marlborough service.

Major Accomplishments: MWRTA has worked with partner agencies to further develop routing to better serve group homes for the disabled. We have also held training sessions and held field trips for potential riders with disabilities to train them how to use the bus rather than rely solely on Ride services. Ridership estimates for this service at the time of application and award were 72 per day, current daily ridership on the route is 99.2 passengers – an increase of 37.8% over expectations. MWRTA received a \$20,000 grant which was partially used to market this service to disabled workers.

How is the Service/Project Evaluated? A key measure of the effectiveness of this grant is ridership. The initial application of this service included estimates from the regional planning authority which indicated that once the service was established it should generate ridership of approximately 72 riders. The route current carries about 100 daily riders. The service has only been in operation for 18 months and

continues to show an upward growth trend period. Ridership is projected to increase an additional 9.8% in the current fiscal year due to local partnerships in the service area.

Lessons Learned: MWRTA has learned that partnering with stakeholders improves our projects. We have worked with social service agencies to improve mobility to the disabled community through changes in routing. We have become part of a network of agencies that service the community and work in partnership to improve our region.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: New Freedom – Enhanced Client Communication

Date Funds Awarded: 1/12/12

Total Funds Awarded \$450,000

Date Project Began 1/12/12

Date Projected Ended: On going

Primary Service/Project Goal: Enhanced Paratransit Client Communication/Customer Empowerment

Service/Project Description: Creation of an enhanced website interface that will allow customers access to their account information including the ability to register and cancel trips during hours that the call center is closed, the ability to receive confirmation emails when a trip is scheduled and installation of auto call features to compress the range of time that customers can expect confirmation calls. Another phase of the project is to develop GPS based auto call features to alert passengers when the Ride vehicle is nearby – reducing active waiting time for the customer.

Major Accomplishments: As this is a relatively new grant (less than 6 months old), MWRTA has only recently begin implementation of the grant. The first item that the Agency has developed is a call back system which allows RIDE customers to receive their choice of a call, text or email indicating their trip time as it is generated the evening before the trip. As a result of this system, the MWRTA is saving 6 person hours per day, seven days a week for an annual savings of approximately \$44,000. This feature also benefits the customer as they have a compressed waiting time in the evening for their trip time. The old system required a person to call the customer during a three hour window whereas the new system reduces the call window to 90 minutes. The agency is working to bring down this call window to less than one hour for further added passenger convenience.

How is the Service/Project Evaluated? During the first task of this contract, the project is being evaluated by the agency cost savings through service automation (\$44K per year). The estimated cost to develop this feature was \$40K so we will begin seeing payback later this year. The project is also being evaluated through better service to our customers - reducing the trip call back window by half (from 180 to 90 minutes). MWRTA anticipates reducing this window to under one hour.

Lessons Learned Typically when the quality of a service goes up – the price goes up as well. MWRTA has found a way to improve our customer service to RIDE users while simultaneously driving down our operating costs. This is an important factor for us as we continue to see growth in our system usage with revenues remaining flat. MWRTA will use the remaining time and money available through this

grant for other communications features to further improve the users experience while simultaneously reducing costs.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: JARC Route 1 Service

Date Funds Awarded: 10/16/09

Total Funds Awarded \$140,000

Date Project Began: 10/16/09

Date Projected Ended: On going

Primary Service/Project Goal: The purpose of this grant is to provide partial funding for the second year of MWRTA's Route 1 Service – a reverse commute connection between the Woodland T stop and Framingham.

Service/Project Description: The Route 1 service provides reverse commute opportunities for people residing in the Boston area and working at businesses along the Route 9 corridor in the Metrowest service area.

Major Accomplishments: MWRTA has worked with local businesses to adjust the bus schedules to better meet the needs of the business commuter community. The agency has also been able to work in cooperation with the MBTA to provide a bus bay, waiting area and signage at the Woodland MBTA station to facilitate system transfers. MWRTA was the first RTA to develop a farebox program to allow for interoperability between the systems with the use of a single Charlie Card.

How is the Service/Project Evaluated? Success of this service is based on ridership. The first year of service resulted in 26,274 riders. This grant, which funded the second year of service saw ridership increase 23.6% for a total second year ridership of 32,483. Since completion of this grant, MWRTA has operated a third year of service with a total annual ridership of 42,463. This is an increase of 30.7% over the previous year and 61.6% higher than the first year of service.

Lessons Learned: MWRTA has learned that we need to accommodate the business community to ensure that our services meet the needs of the commuter. Route 1 operates during peak periods every 30 minutes, during other times service runs hourly or not at all. MWRTA has adjusted the schedules to these routes to meet employees schedules. MWRTA also works collaboratively with other organizations to ensure that we maximize convenience for our customers.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: JARC Technology Suite

Date Funds Awarded: 8/15/11

Total Funds Awarded \$464,000

Date Project Began 8/15/11

Date Projected Ended: On going

Primary Service/Project Goal: The purpose of the JARC Technology Suite is to use technology to improve transit operations to provide more convenient and reliable transit service for low-income commuters.

Service/Project Description: MWRTA will use the funding from this grant to acquire technology for real time communication with customers requesting route deviation to access places of employment close to but not on existing routes; better connections between routes for synchronized transfers utilizing information made available through mobile data terminals. The program will improve access to employment by expanding the MWRTAs network and streamlining transfers. Components of the program include the purchase of MDTs, dispatch stations and servers to migrate data from off-site hosting to secure, internal control.

Major Accomplishments: MWRTA has worked with partner agencies to further develop routing to better serve group homes for the disabled. We have also held training sessions and held field trips for potential riders with disabilities to train them how to use the bus rather than rely on Ride services. Ridership estimates for this service at the time of application an award were 72 per day, current daily ridership on the route is 99.2 – an increase of 37.8% over expectations. MWRTA received a \$20,000 grant which was partially used to market this service to the disabled community.

How is the Service/Project Evaluated? A key measure of the effectiveness of this grant is ridership. The initial application of this service included estimates from the regional planning authority which indicated that once the service was established it should generate ridership of approximately 72 riders. The route current carries about 100 daily riders. The service has only been in operation for 18 months and continues to show an upward growth trend period. Ridership is projected to increase an additional 9.8% in the current fiscal year due to local partnerships in the service area.

Lessons Learned: MWRTA has learned that partnering with other entity improves our projects. We have worked with social service agencies to improve mobility to the disabled community through changes in routing. We have become part of a network of agencies that service the community and work in partnership to improve our region.

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: New Freedom - Hospital Shuttle

Date Funds Awarded: November 2011

Total Funds Awarded \$200,000

Date Project Began November 10, 2011

Date Projected Ended: On going

Primary Service/Project Goal: One seat rides for people with disabilities to medical facilities outside of the MWRTA service area.

Service/Project Description: This project provides regularly scheduled shared transportation for people with disabilities to medical facilities outside of the MWRTA service area. This service was initially developed in coordination with the Massachusetts Veterans Transportation Committee and has been expanded to service hospitals in the Longwood Medical area.

Major Accomplishments: MWRTA kicked off service on November 10, 2011. The service which operates three round trips a day on Tuesdays and Thursdays initially was developed with the VA hospital as a stop. The Natick VFW Post has allowed the agency to create a park and ride/drop off site at their facility. In March 2012, MWRTA expanded the service to reach other Boston area hospitals including those in the Longwood Medical Center. Trendline data shows a slow increase in the daily number of persons taking this service.

How is the Service/Project Evaluated? Ridership is the key measure of the success of this grant. MWRTA is working with the VA and other advocacy groups to market the service.

Lessons Learned – Partnering with hospitals, social service agencies and other organizations can help build awareness of the services.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Metrowest Regional Transit Authority

Address 37 Waverley Street,
Framingham, MA 01701

Entity Type: RTA

Project Name: New Freedom –Mobility Management

Date Funds Awarded: 12/14/09

Total Funds Awarded \$200,000

Date Project Began 12/14/09

Date Projected Ended: On going

Primary Service/Project Goal: Enhanced Service Coordination in the MWRTA

Service/Project Description: The Mobility Management project would allow greater coordination between service providers in the MWRTA service area. By coordinating the Councils on Aging, MBTA services, demand response and fixed route services we will provide smoother transitions across systems expanding mobility in the Metrowest area. Specific attention will be paid to ADA eligible individuals to assist them in accessing fixed route services that were currently unavailable to riders before the MWRTA's formation. The grant also purchased a small amount of capital items to be used to further the goals of the program.

Major Accomplishments: MWRTA has had a variety of accomplishments since the start of this project. We have strengthened connections to the MBTA Woodland connection through signage and service coordination, we have worked with WRTA to reduce paratransit trip transfers where feasible. We have worked with key agencies such as Employment Options Inc and programs such as the Massachusetts Veterans Transportation Commission (of which MWRTA is a charter member). The MWRTA has also worked closely with UMASS Boston's Work without Limits program which has funded training programs for the agency and allowed us to conduct outreach programs to the disabled community.

How is the Service/Project Evaluated? Ridership is the key measure of the success of this grant. MWRTA works closely with other service providers and agencies to facilitate mobility in the region. In FY09 to FY10, the first year that MWRTA took over services demand response ridership decreased by 10 percent while simultaneously fixed route ridership increased by 11 percent. This is due to a number of factors including changes in fares and transfers and availability of new fixed route service. In the second year of the change-over, demand response ridership increased 1.4 percent whereas fixed route ridership grew by 5.2 percent. MWRTA is working to continue the trend of growing our fixed route system at a faster pace than our paratransit service.

Lessons Learned Some riders need paratransit services, however there are a lot of individuals who can be trained to use fixed route transit services. Facilitating this transfer reduces the agency cost of providing the trip while empowering the individual to control their own travel.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity: Mystic Valley Elder Services

Address: 300 Commercial Street, #19

Malden, MA 02148

Entity Type Nonprofit corporation, State designated Aging Services Access Point, federally designated Area Agency on Aging

Project Name : Mystic Valley Connect-A-Ride Alliance

Date Funds Awarded #1 January 2009-December 31, 2010 and #2 February 2010-December 31, 2011

Total Funds Awarded #1: \$108,992; #2: \$129,107

Date Project Began January 2009

Date Projected Ended Ongoing

Primary Service/Project Goal Project goal is to improve access to transportation for older adults and individuals with disabilities within the communities of Everett, Malden, Medford, Melrose, North Reading (no public or paratransit available), Reading, Stoneham, and Wakefield.

Service/Project Description: Two pronged approach includes 1) contracting with Greater Lynn Senior Services transportation services to maximize resources and develop a coordinated transportation alliance and central call a ride mobility management system among the Councils on Aging and other vendors within the region, and 2) to launch TRIP Metro North (previously called TRIP Greater North Shore), a replication of the successful Riverside, California volunteer transportation program designed to provide transportation services for older adults and individuals with disabilities who cannot drive but do not qualify for the MBTA Ride program or live in a community where paratransit is not available.

Major Accomplishments: Launch of the TRIP Metro North program beginning in North Reading where the MBTA Ride is not available. The program has been marketed in the majority of our communities; marketing is ongoing and ridership continues to grow.

How is the Service/Project Evaluated? We plan to develop a TRIP customer satisfaction questionnaire for distribution within the next six to nine months.

Lessons Learned: In FY 2011, based on feedback from a meeting with residents at a local housing authority complex who voiced concerns about their ability to access shopping and medical facilities, we piloted a weekly van program designed to take them where they said they wanted to go. Two popular local malls were identified and the van was available to take residents to each mall on alternating weeks. Ridership (see Table-2 New Freedom Service Matrix, line 4c) was extremely limited. The lesson learned, unfortunately, is that what people say they want and what they will do can be very different.

**Use additional pages if needed.*

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity New England Paralyzed Veterans of America

Address 1600 Providence Hwy, Suite 143
Walpole, MA 02081

Entity Type veterans service organization - non-profit

Project Name NEPVA TRANSPORTATION

Date Funds Awarded 2009 & 2011

Total Funds Awarded \$56,000 for Capital and \$35k operations

Date Project Began 2011

Date Projected Ended Ongoing

Primary Service/Project Goal assist non-service connected veterans with transportation

Service/Project Description Provide Free accessible and regular transportation

Major Accomplishments increasing awareness of organization, increasing better health of veterans because they can make their appts and keep them.

How is the Service/Project Evaluated? Return calls for future pick-ups

Lessons Learned Timing,

*Use additional pages if needed.

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE*

Operating Entity City of Salem/North Shore Workforce Investment Board

Address 120 Washington St., Salem MA 01970

Entity Type Municipality

Project Name Specialized Employment Transportation (SET) Project of the North Shore

Date Funds Awarded February 2011

Total Funds Awarded \$517,810

Date Project Began February 2011 (initial grant for SET North Shore from Feb. 2010 to Jan. 2011)

Date Projected Ended Project end date will be September 2012

Primary Service/Project Goal - Provide Mobility Management services for North Shore residents and operate Employment Xpress transportation for persons with disabilities/low income persons

Service/Project Description Mobility Management services include trip planning services to help North Shore residents access appropriate and affordable employment-related transportation.

Employment Xpress transports eligible persons to employment locations within Danvers, Peabody and Salem that are not served by the MBTA, operating every day from 6:30 AM to 11:30 PM (\$2 per trip)

Major Accomplishments Employment Xpress has succeeded in providing new employment options for more than 40 customers, with 3000+ trips to date (see attached report). NSCC Mobility Managers have made more than 500 contacts with individuals, agencies & employers on transportation options

How is the Service/Project Evaluated? For Employment Xpress we measure on-time performance to work, no-shows/late cancels, and average trips per month per customer. All customer and trip data is maintained in a database including customer applications, trip authorizations and fare card purchases.

Lessons Learned The original estimate of ridership growth was based on an average of 35 one-way trips per month, but the actual experience has been an average of 18 trips per month due to many customers who only work one or two days per week — resulting in an adjustment to estimated rides.

**Use additional pages if needed.*

Employment Xpress Performance – August 2010 to January 2012

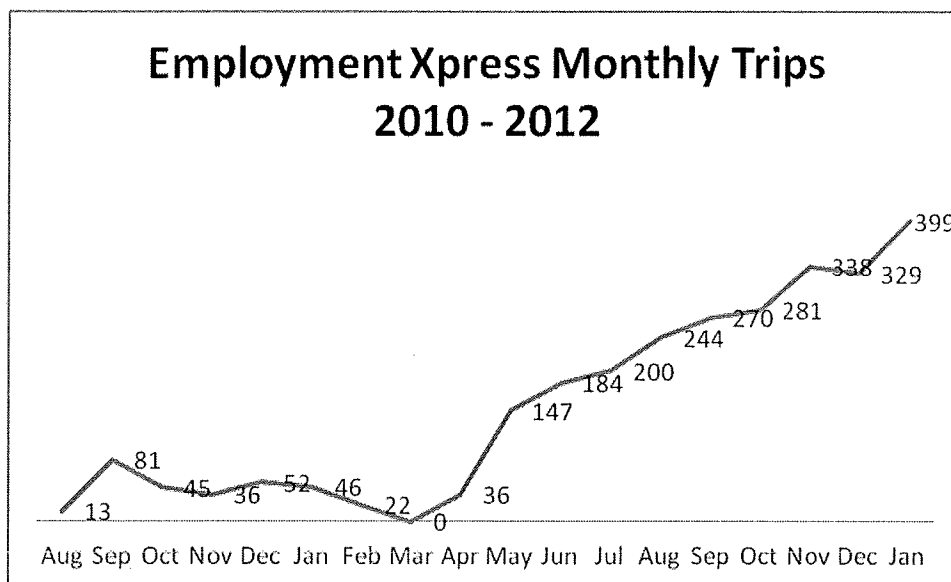
Employment Xpress Operations

The initial application for Employment Xpress service was received on August 10, 2010 and approved within 24 hours, with the first trip made on August 17, 2010. Employment Xpress service was temporarily suspended on February 14, 2011 due to a gap in grant funding. Service was resumed on April 12, 2011.

Due to part-month operations during August 2010, February and April 2011, and no operations during March 2011, Employment Xpress has had 14 full months of operation up to January 31, 2011. The two-month suspension of operations had a negative impact on Employment Xpress customers and ridership.

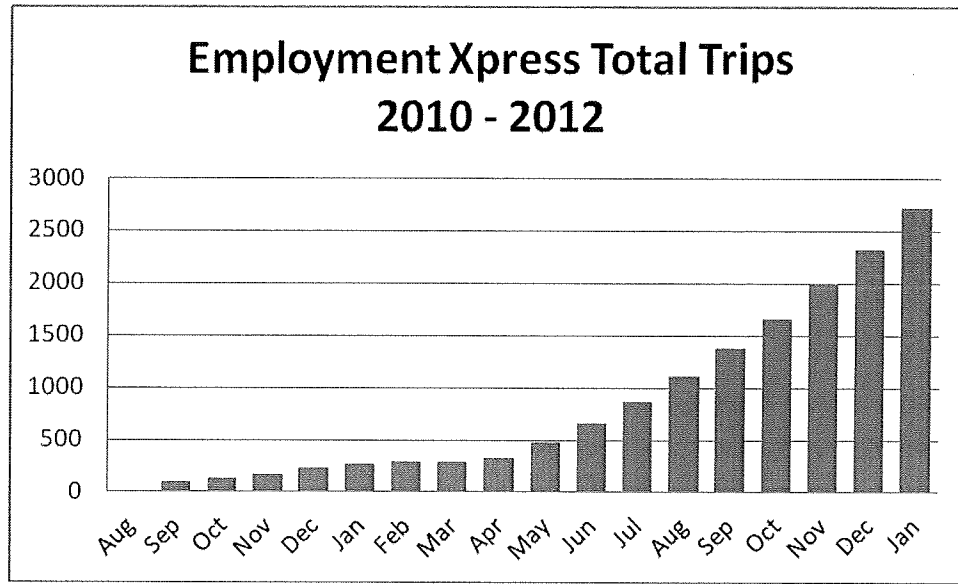
Employment Xpress Ridership

The following graph presents the number of one-way trips on Employment Xpress each month from the beginning of operations in August 2010 to the end of January 2012. During the first grant period (up to February 2011) the monthly ridership was stabilizing at about 50 trips per month. The second grant period (starting in April 2011) shows a very significant increase in ridership to 399 trips per month in January 2012. This increase is attributable to a continuing increase in marketing of Employment Xpress and the word-of-mouth effect as our customer base expands.



The robust increase in monthly trips for January 2012 (21.3% over December 2011) indicates that Employment Xpress continues a pattern of continuing ridership growth. For the nine-month period from May 2011 to January 2012, the average month-to-month increase in ridership has been 13.7%.

The following chart shows the cumulative total one-way trips that have been made on Employment Xpress illustrating the dramatic gains in ridership over the last nine months.



Employment Xpress Customers

A total of 45 applicants have been approved for Employment Xpress service, with 35 of the applicants becoming customers. There has been considerable attrition of Employment Xpress customers due to a variety of factors including layoffs and changes in residence. There were 21 active customers in December.

Over the period from May 2011 to January 2012, each customer made an average of 18 trips (one-way) per month, which is considerably lower than the original estimate of 35 monthly trips per customer. This is due to a number of customers who travel to work only once or twice a week. The monthly trip rate is an important factor in making projections of trip demand for Employment Xpress.

One major objective of Employment Xpress is to provide access for customers to employment locations in the Route 1 and Route 114 corridors which are not served by public transportation. Our current and past customers have been able to find work at the following well-known companies located on or near these corridors:

- Brooksby Village (retirement community)
- Carraba's Italian Grill
- Chili's Restaurant
- CVS Pharmacy

- Denny's Restaurant
- Dunkin Donuts
- GAP
- Home Depot
- Lowe's Home Improvement
- Market Basket
- McDonalds
- Olive Garden
- TJ Maxx
- Wal-Mart

Marketing of Employment Xpress

During the first grant period (up to February 2011), marketing efforts were focused on outreach to job developers at our partner agencies. This was done in order to ensure that they would broaden the scope of their employment opportunity searches for their clients to all locations (not served by public transit) in Danvers, Peabody and Salem. Outreach to the general public was made through flyers placed in key locations and presentations at various meetings. Other marketing materials included a PowerPoint presentation explaining how Employment Xpress operates and a detailed map of the Employment Xpress service area clearly delineating streets and borders.

At the start of the second grant period (April 2011), it was decided to accelerate our marketing efforts by initiating a series of actions designed to increase ridership on Employment Xpress. These actions include:

- Increased interaction with Job Developers through regularly scheduled on-site meetings
- A cooperative effort with the Career Center's Business Services Unit (BSU) to reach out to key employers in the service area to advise them of the benefits of Employment Xpress
- Public Relations Campaign to Build Awareness of Employment Xpress

One of the major efforts to date has been the outreach to key employers, particularly those in the Route 1 and Route 114 corridors. We have formed two field teams comprised of a Mobility Manager and a BSU representative to make direct site visits to key employers. The approach used by the field teams is to engage the Store Manager or Human Resources Manager to determine whether there are staffing or employee

transportation issues and then describe applicable BSU and/or Employment Xpress services. If there are no specific issues the field team leaves one or more copies of the tri-fold brochure for both BSU and Employment Xpress.

The field teams have conducted approximately 50 company site visits to date. Information from the site visits is being incorporated into a database that contains basic information (address, phone, contact person, etc,) on approximately 500 companies in Danvers and Peabody. The ultimate goal is to develop a tracking database for those companies that have shown interest in BSU and Employment Xpress services in order to ensure that follow-up actions are taken in a timely manner.

Based on the significant increase in ridership during the second grant period, we consider the marketing effort for Employment Xpress to be successful. These same marketing efforts will be maintained on an on-going basis.

BOSTON REGION MPO JARC/NEW FREEDOM PROJECT PROFILE

Operating Entity: SCM Community Transportation
167 Holland Street
Somerville MA, 02144

Entity Type: Private Non-Profit 501(c)(3)

Total Funds Awarded: \$51,788.00

Project Name: *Access to Success*

Begin Date: March 1, 2009
End Date: February 8, 2011

Primary Service/ Project Goal:

The initial goals for *Access to Success* were:

- To work with *Career Source* to identify, rank and prioritize specific employment transportation barriers faced by welfare recipients, low income individuals, and individuals with disabilities for the Metro North Region.
- To launch a small pilot addressing some of those gaps within six months.
- At the end of twelve months, to have designed and proposed a program entity that routinely convenes stakeholder organizations (employers, transportation providers), folding them into an ongoing collaboration adhering to the best practices of *mobility management*.

However, the downturn in the economy in 2008 proved to be a disincentive for employers' participation. Businesses were busy laying off workers and "keeping the doors open." Improving transportation options for employees simply was not a priority. We then re-scoped our project to focus on indentifying smaller scale efforts that would immediately benefit workers in an area we called the *Lower Mystic*, which is the Route 16 corridor from Route 1 in Chelsea, through Everett, to the Meadow Glen Mall in Medford, also taking in Somerville's Assembly Square.

Service/Project Description (Deliverables):

Initial Efforts (Prior to Economic Downturn)

- SCM evaluated demographic data to indentify where job seekers are most concentrated and where jobs were available in the Metro North Workforce Investment Area. We focused on crystallizing the regional gap between workers in the Inner North and jobs along 128.
- Working with *Career Source*, we completed a survey of job seekers in the region to investigate perceived transportation barriers to employment.

Re-Scoped Initiative

- Recognizing the significant development that has occurred in the *Lower Mystic* and its status as a priority area going forward, SCM hoped to convene employers, chambers of commerce, transportation providers, property managers, workforce development agencies and local officials. We wanted to create an ongoing collaboration that would improve accessibility to workers and consumers alike.
- The final convening did not occur; however, we have, in hand, a deliverable that suggests the appropriate steps for creating a transportation management association (TMA) that could serve as a platform to bring best practices in *mobility management* to the *Lower Mystic*.

Major Accomplishments:

- *Access to Success* was SCM's first foray into the field of *mobility management*, and it allowed our organization to think profoundly about coordination of services and to begin charting a way forward in that arena.
- Our analysis of demographic data of job seekers and job locales is excellent. We wonder, though, if it is redundant with other work being done. We wonder if it would be useful to other entities and how to make it available to them if it is.

- We have created a stronger business case for the creation of a TMA in the *Lower Mystic*. As it turns out, the implementation of a TMA is mandated by a community agreement with the Assembly Square developers. We hope to deploy our skills and experience to become a platform for that TMA, facilitating the adoption of *mobility management* best practices in the area.

Lessons Learned:

1. *Budget reasonably.* SCM did not request enough funding to cover the scope of this ambitious project.
2. *Participate in the conversation.* Non-profit providers such as SCM will be invaluable as our municipal, state, and federal governments contend with the tremendous challenges of economic austerity and complex transportation needs. To meet the needs, we will have to augment our competencies. After 27 years focusing on direct provision of trips, we must learn to coordinate and to be information brokers. Travel training must become part of what we do.
3. To that end, SCM has applied for and won a New Freedom grant that will underwrite our mobility management efforts, including an emphasis on aggregating and disseminating information about all transportation options and for a broader constituency.