**Transportation Talks Case Studies – Barron event**

Name of Program: Assisted Mobility Devices: “The trike program”

Contact name and email: Laura Neve Laura.neve@co.polk.wi.us

Program basics:

What is your program? Our program is to provide alternative modes of transportation due to the lack of both public and private transportation in our area. It ended up primarily being trikes with electric motor backup in case there is a hill, difficult surfaces or they just putter out. The trikes equipped with a large basket and safety kit are given to the individuals. This may also include adaptations such as straps for legs or tie downs for walkers/canes, etc.

Who operates the program? We do the direct management and coordination in house for the program. We do an RFP for one vendor to serve both counties. The vendor provides the trikes, distribution and safety education.

How long has it been in operation? Did it change over the years? How long did the planning process take?: We are starting our third year. The first year took a couple months working with a bike shop learning the different options and to develop what the process will look like to get to the end result we wanted. Then another few weeks working with Administration and Corp Counsel to develop the RFP (Request for Proposals) and liability releases, etc. The planning for subsequent years have not taken long, maybe a week or two to review the previous year and see what changes we would like to make, then just change the dates on the RFP to submit. However, there is time involvement for going through the RFP process each year to select the vendor.

We have learned a few things each year to tweak the process, which are listed below.

Funding mechanism:

How is it funded? We found ourselves with a significant amount of funds in our trust accounts and were looking for ideas of one-time funding needs which would not also create an impact on the general operating budget with ongoing maintenance expenses. It is solely covered with trust account funds.

Knowledge Transfer to new programs contemplating similar programming:

Lessons learned/things you’d do again or do differently:

We are a multi-county agency (2 counties). The first year we did separate vendor selections. We changed to one RFP to serve both counties as we had two very different experiences and service levels out of the vendors. Through those differences we also learned what to formally request out of the vendors if they are to be selected.

The first year we had two types of trikes to choose from, a standard trike and a folding one (thinking that would be more portable for people). 49 out of 50 people selected the standard trike as it felt sturdier for them. Now we just offer the standard. We also do not have the individuals select their own colors as it slows down the process. We are just providing basic colors which allows us to have the bikes ordered and start building right away as soon as the vendor is selected. We have enough people on a waiting list to guarantee they will all be spoken for. We offer 25 per county each year.

We have also decided that we need to have people try them out before they are selected to receive one. The first year we did to select the type. The second year we didn’t. This year we will be again. The feedback we have received by a few individuals were that they didn’t really know what they were getting or they didn’t realize they wouldn’t feel comfortable riding it.

In one county we have many areas that is primarily sand surface. We added the option of fat tires for those who have that need.

What data do you collect data? How do you measure success? Up front we collect all their demographics as well as their intent of usage. We also ask whether they would anticipate using it for shopping, going to town for medical appointments, social reasons or for exercise.

Unfortunately there were many circumstances in which they were delivered so late the first year that they were not able to really use them until last year. So this year will be the first year we will be following up with the recipients to ask their actual usage: What type (shopping, social, exercise)? How often? What benefits have they gained? Is the program worth continuing and why? Also seek feedback on the process of receiving their trike.

Share a story about riders on your systems (Remind us why we do what we do!) or provide other information you’d like your peers to know so they can replicate your program if they choose to do so.

One of my favorite moments happened the first year as we had our recipients meet us at the local airport to try out the trikes on the tarmac. It was a 95 year old who had a volunteer driver bring him over. He lived just outside of his town by about a mile. He used a walker to get to the trike all the while saying that there is probably no point in him “trying to do such nonsense”. He struggled a little getting on the trike the first time. But once he figured it out, we couldn’t get him off of it! He was cruising all over and of course asked if he could take it to his local pub. ☺ You could see the enthusiasm of his new found independence.

Name of Program: **Rusk County Transit Commission**

Contact name and email: **Sheryl Kisling-Werner, sheryl.kisling@rctc.online**

Program basics:

What is your program – or one innovative aspect of your program? **We extend our program knowledge to any agency that is coordinating transportation who feel they need assistance. We have found that most agencies have all the components that would make a successful transportation program. They need to survey their intended area of need, pool their resources and outline a plan. We offer grant writing help also. Being in the rural Northwoods even the smallest transportation agency makes a difference for getting people where they want to Go!**

Who operates the program? **Operation of RCTC’s programs are** **direct management under the Transit Manager an advisory Board that meets** **every 2 months. Mobility Manager and Travel Trainer positions help with rider management. Finance Manager is responsible for the fiscal aspects. Vehicle repair and general fleet maintenance is operated in-house garage facility with our Garage Manager. A dispatch team is used to reserve rides for both City, County and Volunteer driver pool. They use a web based reservation and phone system to allow them to work remotely.**

How long has it been in operation? **Rusk County was awarded it first Rural Mass Transit Grant in 1971.** **RCTC will be in operation for 50 years in 2021.**

Did it change over the years?

**1982 the 85.21 Grant for the Volunteer Driver Program was applied for and RC HHS contracted with RCTC to oversee this program.**

**1994 the garage facility was procured through WisDOT and a mechanic and garage clerk were hired.**

**1971-2013 transportation was operated by a Community Action Agency.**

**2012 both Travel Trainer and Mobility Manager positions were applied for through the 5310 program. Both were awarded. We still staff both positions.**

**2014 we were directed by WisDOT to form a Commission where we were no longer obligated to bid out every 5 years for transportation services for Rusk County.**

**2017 5311 and 85.21 programs were integrated so we can use volunteer hours as in-kind revenue for the 5311 program in order to generate more federal grant dollars. When you integrate programs like 5311 and 85.21 you have to follow all federal guidelines. Whereas the guidelines for the 85.21 are quite lenient the federal guidelines are not. As for the 5311 and 85.21 co-existing combined reporting through the Black Cat is required along with separate accounting for each program.**

**Funding mechanism:**

**How is it funded? The following programs are operated and housed under one roof :**

**5311/85.20 Funds help operate the Demand Response City of Ladysmith trips and rural routes**

**85.21 funds help operate the Volunteer Driver Program**

**5310 grant funds the Mobility Managers position**

Knowledge Transfer to new programs contemplating similar programming:

**Lessons learned/things you’d do again or do differently**

**Hire a good candidate and send them to Travel Training classes. Our travel trainer is not just an “on the street advocate” but also ensures before the 1st ride is given to a rider all devices riders will use have been inspected. This ensures a safe trip for both rider and driver. This procedure has saved a lot of time, worry, and complaints.**

**Ensure all drivers are following safety and operations procedure as trained. Rider sometimes like to instruct drivers on how they want their devices secured for example. For the sake of all drivers and the agency a driver procedure must be followed.**

What data do you collect data? **Rider data is collected for both the 85.21 and the 5311 programs by cloud based software. This data is shared between programs and with marketing manager to “get the word out” about all how many trips were performed in certain times periods.**

How do you measure success? **Like most transportation agencies we measure success by our rider trip data. But what really tells the story is the rider, volunteer, and employee satisfaction with the way the program is being operated.**

Share a story about riders on your systems (Remind us why we do what we do!) or provide other information you’d like your peers to know so they can replicate your program if they choose to do so.

**We do not turn a caller for a ride away – we use Mobility Managing techniques to secure the most appropriate transportation at the best price—having transportation options under the same roof saves time and money. Trip coordinators/dispatchers can give numerous trip options to the caller and reserve the trip even between two programs.**

**We offer help with trip fares through our local community foundations, red cross, salvation army. We offer a reduced fare program for critical care patients (dialysis & cancer) based on their income.**

Name of Program: North Country Independent Living Transportation Voucher Program

Contact name and email: Bob Olsgard, bob@northcountryil.org

Program basics:

North Country Independent Living operates a transportation voucher program for residents in eight Northwestern Wisconsin counties. With vouchers, eligible participants may schedule their own rides, allowing us to facilitate an extremely large volume of rides with minimal administration. Each program participant receives an initial orientation during which IL staff review all transportation options available to them. At our initial intake/orientation meeting participants (we call the individuals we work with consumers) identify where they want to go and how often. Based on this list of needed trips and how much funding is available, we set a monthly allocation: the number of miles that each consumer may use to reimburse drivers.

Our voucher program facilitates direct driver to rider relationships. Consumers may go anywhere they choose. They may select anyone they wish to drive for them. If they do not know a driver who is able to make these trips, we will assign one for them from our pool of drivers. Once we put them together with a driver, consumers may schedule future rides directly. We like to say that we were Uber before Uber.

We also maintain contracts with a number of commercial transportation providers for wheelchair-accessible trips and other special arrangements in which volunteer drivers are not able to provide the needed service.

North Country has operated this program directly since we began with a pilot project in 2007. In the past five years, we are receiving an increasing number of referrals for urgent rides. These are trips for consumers we have not previously worked with and will occur in the very near future (one to five days). Unlike trips for our voucher consumers these require individual dispatch/scheduling. The time it takes to schedule each ride is significant. Just like any other transportation gap in our region, where there is a need, we try to fill it.

Our primary source of funding for this program is an annual grant from the Wisconsin Department of Transportation’s 5310 program. We also receive donations and provide trips on a fee for service basis trips for other agencies.

The self-management aspect of our program requires a bit of learning and adjustment for some consumers. As an independent living center, our approach is to build self-reliance, helping people help themselves. We find that consumers who are not accustomed to this way of doing business sometimes need a bit of initial help learning to schedule rides and manage their allocations (budget for transportation) directly. The program works best where consumers have friends or family who can make these trips with the added help of reimbursement.

We track the number of rides, the miles, the trip purpose, and volunteer hours. Between 2008 and 2018, we provided more than 80,000 rides totaling more than 1.5 million miles for more than 400 consumers in our eight-county service area. We measure success by the number and kind of rides we facilitate that no other program would or could provide.

Our approach is to provide access to transportation that is—as much as possible—like that enjoyed by the rest of the driving public. Each individual consumer has his or her individual reasons for using our program. Here are some of their stories. (We have changed the names in order to protect our consumers’ identity.)

* John is now cancer-free. He was able to travel to radiation treatments 80 miles round trip forty times in in six weeks.
* Jean was able to attend her 50-year high-school re-union in her hometown three counties away.
* George, a homeless veteran, was able to travel to a residential recovery program in Tomah.
* Joan was able to go see her mother before she died.
* Many of our consumers have traveled to weddings family re-unions, funerals, and other social events.
* Linda and Bill are younger consumers who are traveling to work in a nearby town.

The voucher program is part of our larger program that includes recruiting and training volunteer drivers who are available to our partner program operated by CILWW, providing fee for service trips through DVR and several county-based programs.

Name of Program: CILWW/New Freedom Transportation Program

Contact name and email: Bobbi Craig-craigb@cilww.com

Program basics:

**What is your program – or one innovative aspect of your program?** New Freedom *Transportation program provides rides for the elderly and persons with disabilities to be able to participate fully in their communities. These riders live in rural areas where access to transportation is very limited or non-existent. We provide rides to doctor appointments, employment, social, nutrition, shopping, education, and personal business.*

**Who operates the program?** (direct management or under contract?) Direct Management

Executive Director, Transportation Director, Transportation Coordinator and 5 full time Dispatchers and one transportation support person.

**How long has it been in operation? Did it change over the years? How long did the planning process take?**

New Freedom Program has been in operation since 1999 as a voucher program first, then became a volunteer driver program in 2001 as we know it now.

New Freedom has had many changes over the years. Starting out in 3 counties then increasing to 10. We then collaborated with North Country Independent living to make 18 counties and now last year we also joined in collaborated with Midstate Independent living choices to make up a total of 29 counties that we provide services.

From the time that transportation was added to a strategic plan in 1999 it was 3 years until CILWW began a pilot voucher program. After that a grant was received from Bremer Foundation. We began the pilot volunteer driver program in 3 counties, (St Croix, Dunn, Eau Claire) soon after that we were able to secure federal funding and additional grants to expand the program to all 10 counties in the CILWW service areas. When this all began at UW Stout, the goal was to bring together all persons involved in and concerned about the needs of transit dependent persons living in rural areas. Following the meeting at UW. Stout, CILWW worked to develop Western Wisconsin regional transportation collaborating counsel to bring together transportation stakeholders and begin the dialog to address the unmet transportation needs in Western Wisconsin.

Funding mechanism:

**How is it funded?** (grants, levy, other) Grants: We receive money from **53.10 (New Freedom Transportation grant)** which is 61% of the budget. We received grant money from **Otto Bremer Trust**, **Huge Anderson Foundation** **and United Way St Croix Valley**. The rest of our budget comes from contracts with 5 counties for 85.21 monies, along with contract with **Inclusa, Lakeland and Cares Wisconsin**. We direct bill **IRIS, DVR, WRRWC** and requested transportation from individual counties as well.

Knowledge Transfer to new programs contemplating similar programming:

**Lessons learned/things you’d do again or do differently**: In speaking with the 2 gentleman Tim Sheehan and Kyle Kliest that took on this adventure and started this program, they both thought the biggest lesson learned was **that nothing comes easy**. They also both agreed that in hind sight they would have been more proactive in using a volunteer driver model, as this became the most effective way of meeting the transportation needs of the population that they were hoping to serve.

**What data do you collect data? How do you measure success?**

Name, age/birthdate, disability, mobility, address and which county they live in, phone number, race, sex/gender, billing agents, veteran status, how they were referred to the program, date they started using our services, emergency contacts.

We measure success by the increasing number of riders/ rides, also the increasing numbers of drivers needed to provide all the rides requested. Collaboration with other entities resulting in new contracts and MOU’s to provide services. We also use a survey, that is sent to riders, as a gauge to determine if their needs are being met.

**Share a story about riders on your systems (Remind us why we do what we do!) or provide other information you’d like your peers to know so they can replicate your program if they choose to do so.**

We had a rider who was in a serious car accident. During his hospital stay he suffered a staph infection in his spine, but he was very determined to walk again. He went from a stretcher to using a wheel chair and that is when we started transporting him 6 days a week to physical therapy. He then began to use a 4 wheeled walker, then he was able to use a 2 wheeled walker, then he worked his way to 2 canes and then one. 6 days a week our drivers took him and sometimes he had to go 7 days’ week. He used our services for little over a year, but we were so proud to also provided the transportation for him to get his driver’s license back.

I would say some of the things to remember is that nothing is black and white in transportation, it changes daily and with each person. To be open minded and nonjudgmental. And to think of a thousand reason to give this ride versus one reason not to.

**Name of Program:**

Aging and Disability Resource Center of Buffalo & Pepin Counties Transportation Program

**Contact name and email:**

Kristin Smith Procter / Transportation Coordinator

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**Program basics:**

What is one innovative aspect of your program? Beginning January 1, 2019- Pepin & Buffalo Counties joined their 85.21 programs to service residents of both Pepin & Buffalo Counties.

A Transportation Coordinator position was created in 2017 – budgeted for 2018 and hired by the end of that year. The position was implemented to gain an understanding how each individual county currently runs their programs and develop a strategic plan and timeline for a new two county transportation program. This created a bigger pool of available drivers and an expanded range of transport services for passengers.

Challenges over the last 6 months have included: a) different county employers & departmental organizational charts, b) separate transport reservation guidelines and procedures, c) different mileage reimbursement rates, and d) communicating these changes effectively with both the passengers and volunteer drivers while highlighting the benefits to each group in a positive light.

This collaborative outlook also involved Buffalo County taking the lead on APS program with an ever-growing aging population in both counties.

Who operates the program? Pepin County has the lead for coordination and implementation for all aspects of the Transportation Program with one Program Assistant (.733) plus the Transportation Coordinator (1.0).

How long has it been in operation? Did it change over the years? How long did the planning process take?

Pepin County transportation has gone through various models over the last few decades. It started out within a separate Senior Services silo, then integrated though multiple levels into the Human Services and Aging Programs. The current bi-county model with Buffalo County was over a year in the planning with the addition of a Transportation Coordinator position being filled and joining PCDHS in the fall of 2018.

Funding mechanism:

85.21 Grant allotment plus minimum levy contribution added – each county applies funds and is tracked separately.

Passenger co-pays from our sliding fee scale are added donations to program. Our new $10 Flat Fee for customers that fall at poverty level or below has cut down on No Shows and has added value to the services provided.

Knowledge Transfer to new programs contemplating similar programming:

**Lessons Learned & Tips:**

**More than just a ride** – Program provides personal contact to those who may not have much personal interaction while also restoring mobility and independence to our more rural senior and disabled population.

**Change Takes Time** –

1.Taking the preliminary steps in planning a bi-county program was a lengthy process including planning, designing a specific position to spearhead the change and two County Board approval processes. Integration meetings with participants of both counties has been key in combining rates & ride procedures- taking the best practices of each and blending. We still meet on a monthly basis for updates and program fine tuning.

2. Setting up various ways throughout the process’ steps to communicate these changes with both county employees, van drivers, volunteer drivers & customers. First letters to past passengers, then volunteer driver meetings, with internal departments, plus updates via email and presentations in staff meetings.

**Variety in Marketing** - to reach an array of customers (i.e. social media/print) depending on age and location. Being flexible in the marketing paths you take as your program grows.

What data do you collect? How do you measure success?

85.21 Reported rides compared over last 3 years for each county. Goals set for % of increases annually.

Denied rides for each county up until integration full integration on 5-1-19, then combined thereafter.

Customer feedback using mail-in surveys on a quarterly basis.

Longevity of both volunteer drivers and return of passengers.

Referrals from other residents or care-giver organizations.

Share a story about riders on your systems -Remind us why we do what we do! :

Our returned Passenger Surveys that are sent out quarterly tell the story…. We enjoy passing along the gratitude & positive comments to both Volunteer & SMV drivers alike!