

UNITED WE RIDE
Texas Mobility Management Project

General Information and Instructions

Issued: January 26, 2010
Response Due: February 26, 2010

Texas Department of Transportation
Public Transportation Division
in collaboration with
Texas Health, Human Service, Education, and Workforce
Agencies

Table of Contents

	Page
I. Introduction	
A. Project Purpose	1
B. Project Outcome	1
C. Background	1
D. Major Activities	1
II. Responsibilities	
A. Recipient Agency	2
B. Health, Human Service, Education or Workforce Agency	2
III. Summary of the Project Timeline	
A. Proposed Timeline	3
B. Evaluations	3
IV. Funding Parameters	
A. Eligible Applicants	3
B. Project Period	3
C. Use of Funds	4
D. Match Requirements	4
E. Conference Call	4
F. Point of Contact	4
G. Due Date	4
H. Mailing and Delivery Addresses	5
V. Progress Reports, Site Visits and Payment Schedule	
A. Progress Reports	5
B. Site Visits	5
C. Payment Schedule	5
VI. Statement of Interest and Selection Process	
A. Content	6
B. Stylistic Requirements	6
C. Selection Criteria	6
D. Interviews	7
VII. Post Selection Activities	
A. Budget and Scope	7
B. Project Evaluation	7
Attachment A Statement of Interest	8
Attachment B Mobility Manager Job Duties	10

I. INTRODUCTION

The Texas Department of Transportation (TxDOT), Public Transportation Division (PTN) applied for and received a United We Ride grant from the U. S. Department of Transportation, Federal Transit Administration (FTA). The grant will fund four pilot projects where public transportation mobility managers will partner with health, human service, education and/or work force case workers to assure individual customer's transportation needs are routinely and efficiently met as part of each agency's standard operating procedures.

A. **Project Purpose**

Use United We Ride mobility management grants to fund grass root efforts in pilot areas to bring public transportation mobility managers and case workers face-to-face to explore the mutual benefits of collaboration.

B. **Project Outcome**

Mobility managers and case workers from diverse agencies adopt or modify practices to routinely and efficiently match public transportation services to individual client's mobility needs.

C. **Background**

In the fall of 2008, the Federal Transit Administration solicited proposals from states for mobility management projects what would be funded by its United We Ride Program. TxDOT assembled an ad hoc committee of 20 representatives from the state's health, human service, workforce, and education agencies to develop a response to the UWR call for projects. The consensus decision was that a project that brought local mobility managers and case workers together in on-going, face-to-face contact would be beneficial.

The group felt strongly that a formal training activity was needed to better prepare mobility managers and case workers for productive collaboration. The timely introduction of a new course offering by the Community Transportation of America (CTAA) eliminated the need to create this training element from scratch.

Four pilot areas will use the training as a background to mainstream transportation knowledge into the case worker community and expand all participants' knowledge of local public transportation activities, whether publically or privately funded.

D. **Major Activities**

- Select four pilot sites; one for each geographic area – urban, rural, border, and a region experiencing significant population and/or economic change.
- Partner mobility managers with identified case workers from health, human service, education and/or workforce agencies
- Provide training to address the barriers that exist between the transportation programs and needs of these groups.
- Spend nine months using the skills taught in the class to expand collaboration and coordination activities among pilot participants. End goal: Mobility

managers have expanded case worker contacts and vice versa; both have increased knowledge of transportation resources.

- Use university staff to carry out an in-depth evaluation process including online surveys, interviews, focus groups, and specialized reporting.

II. RESPONSIBILITIES

A. Recipient Agency

- Mobility manager to attend 2 day training and debriefing event in Austin. Training is the Community Transportation Association of America's [Transportation Solutions Coordinator](#) class. (Travel expenses covered by TxDOT.)
- Provide suggestions on local case worker staff to participate in the pilot, as may be known to local staff. Note that PTN's ad hoc committee of other state agency staff will assist with identifying local case worker staff where necessary.
- Spend approximately three months using material from the Austin training to improve mobility management skills and identify local resources in preparation for the half-day training session.
- Host and teach a local, half-day training event for case workers who will be involved in the pilot. Uses materials from the Austin training with assistance from CTAA staff.
- Work with approximately 20 local case workers over a six-month period to understand programs and transportation needs and assist in developing simple, standard operating procedures (SOPs) and materials that improve client transportation options.
- Participate in the activities of the university project evaluation team (online surveys, interviews, focus groups, specialized trip reporting).
- Prepare written progress reports as referenced in 5.A below.

B. Health, Human Service, Education, or Workforce Agency

- Select one or two staff members (manager or lead worker level) from each pilot area to attend a two-day training/debriefing in Austin – the Community Transportation Association of America's [Transportation Solutions Coordinator](#) class. (Travel expenses covered by TxDOT.)
- Select case worker staff to participate in six month pilot, using Austin training as an aide in selection.
- (Newly selected staff – approximately 20 per pilot) Participate in a half-day training event focusing on how to develop simple, standard operating procedures (SOPs) and materials that improve client transportation options. (Travel expenses covered by TxDOT.)

- Work with the mobility manager, over a six month period, to implement simple, standard operating procedures (SOPs) and use materials that improve the client transportation options.
- Participate in the activities of the university project evaluation team (online surveys, interviews, focus groups, possibly specialized reporting).

III. SUMMARY OF THE PILOT PROJECT TIMELINE

A. Proposed Timeline

When	Who	Activity
January 2010	TxDOT	Post call for Statements of Interest
March 2010	TxDOT and Ad Hoc Committee	Select pilot areas and participants for the Austin training class
April 2010	Mobility Managers and Case Worker Managers/Lead Workers	Attend Austin class
May – July 2010	1. TxDOT-Recipient Agencies 2. Mobility Managers	1. Develop scope of services and budget; sign interlocal cooperation contracts 2. Develop list of local resources and prepare for local training event
August 2010	Mobility Managers with assistance from CTAA	Hold training classes for additional personnel in local pilot areas
September 2010 – February 2011	Mobility Managers and Case Workers	Carry out local pilots Participate in evaluation activities

B. Evaluations

In addition to these benchmark points, PTN is retaining two universities to undertake an on-going evaluation of the pilots, including surveys, interviews, focus groups, specialized trip reporting. Activities will be customized to each pilot. Mobility managers and case workers will be active participants in the process throughout the pilot period.

IV. FUNDING PARAMETERS

A. Eligible Applicants

Publicly-funded transit agencies and political subdivisions of the state ([see Government Code, Section 791.003 \(4\)](#)) with employee(s) meeting the definition of a mobility manager as set out in Attachment B are eligible to apply.

B. Project Period

TxDOT will execute interlocal cooperation contracts with the selected recipient agencies for a nine-month period, most likely beginning in April or May, 2010. The department will meet with recipient agencies after the Austin training session to develop the scope and budget for an interlocal cooperation contract.

C. Use of Funds

A total of approximately \$65,000 is available for allocation among the four recipients. Recipient agencies may use United We Ride funds to cover the following expenses:

- Indirect (10% maximum)
- Office supplies and support
- Travel (based on agency reimbursement policies)
- Meeting space costs (for local half-day training)

Personnel expenses **are not** eligible for reimbursement. The purpose of the pilot is to enhance the transportation coordination skills of the participants as part of their daily job routines. However, the indirect costs for preparing billings and other grant management tasks are eligible up to 10 percent of the individual pilot's eligible costs.

D. Match Requirements

None. United We Ride grants are 100 percent federally funded; no local match is required.

E. Conference Call

The Public Transportation Division will conduct two conference calls at the following times to discuss and answer questions concerning this application process:

- Thursday, February 4, 2010 beginning at 1:30 PM
- Tuesday, February 9, 2010 beginning at 10:30 AM

Potential respondents may participate in either of these calls by 1) dialing 1-877-226-9790 two to three minutes prior to the start of the call, and 2) entering access code 5549633. Participation is optional.

F. Point of Contact

Karen Dunlap, TxDOT, Public Transportation Division
Email: PTN_InternetRequestRecords@dot.state.tx.us
Fax: (512) 374-5244
Reference: UWR Funding Application

As received, The Public Transportation Division will post answers to questions on its website at http://www.txdot.gov/business/governments/grants/public_transportation.htm under the heading, United We Ride.

G. Due Date

1. The Public Transportation Division must receive a complete application no later than 12:00 pm (noon) CDT, **February 26, 2010** to be assured consideration for funding.

2. A complete application consists of
 - a. One original Statement of Interest and attachments, using the template in Attachment A; and
 - b. One electronic disc with a single PDF file of all documents.
3. Applications may be mailed, hand-delivered or delivered by courier. The division will not accept applications sent by e-mail or facsimile.

H. Mailing and Delivery Addresses

Applications shall be submitted to one of these addresses:

U.S. Mail	Hand / Courier Delivery
Texas Department of Transportation Public Transportation Division Attn: Karen Dunlap 125 E. 11 th Street Austin, TX 78701-2483	Texas Department of Transportation Public Transportation Division Attn: Karen Dunlap 3712 Jackson Ave., Building 6 Austin, TX 78731-6004 512.374.5239

V. PROGRESS REPORTS, SITE VISITS, AND PAYMENT SCHEDULE

A. Progress Reports

Recipient agencies will be required to provide the department with three brief written reports – one every three months. The report will include:

1. Agency name:
2. Reporting period:
3. Activity Report: (provide brief progress report on activities for the reporting period)
- 4.a At the three and six-month point: Issues / needs for assistance (identify issues and any need for assistance)
- 4.b At the conclusion: Major accomplishments, unresolved challenges, overall assessment of the success of the project.

B. Site Visits

The Public Transportation Division will coordinate with grant recipients regarding site visits and/or other activities to identify needs for assistance and track progress. PTN anticipates making 1-2 site visits to each pilot.

C. Payment Schedule

Payments will be made no more frequently than monthly and must be accompanied by documentation supporting expenses.

VI. STATEMENT OF INTEREST and SELECTION PROCESS

A. Content

A complete application includes the following:

1. A cover letter bearing an original signature in ink by the authorized representative of the responding organization with the authorized representative's name typed immediately below the signature and stating that:
 - The agency currently employs or will employ by March 15, 2010 one or more persons who meet the definition of a mobility manager as defined in Attachment B.
 - The agency commits to participating in the pilot and will obtain authorization to participate by its governing body if selected.
 - The agency understands that a contract will not be issued until after the agency's mobility manager attends the Austin training class. TxDOT will reimburse the mobility manager's travel expenses to attend.
 - The agency management understands that the mobility manager's salary and fringe benefit costs are not eligible for reimbursement.
2. One paper copy of the Statement of Interest using the template provided.
3. The job description for the mobility manager
4. Letters of support from local health, human service, education or workforce agencies expressing interest in the project (optional)
5. An electronic disk that includes all the above in a single pdf file.

B. Stylistic Requirements

The application shall meet the following stylistic requirements:

1. All pages clearly and consecutively numbered
2. Original unbound, but secured with paper/metal binder clips (no three-ring binders, please)
3. Typed (computer or typewriter);
4. No less than single-spaced;
5. No less than 11-point font on 8 ½" X 11" paper with 1" margins

C. Selection Criteria

TxDOT staff and the ad hoc committee will use a consensus-driven process to recommend the four pilots to the PTN Division Director for selection. Factors to be considered include but may not be limited to:

- Geographic criteria – urban/rural/border/changing socio-economic area
- Nexus between this UWR mobility management project and the applicant agency's coordination priorities
- Past and current coordination activities
- Identified financial sources for continuing the outreach activities of the pilot
- Ability to secure case worker participants, whether identified by the recipient agency or the ad hoc committee.
- Additional factors of interest to the PTN Division Director.

D. Interviews

TxDOT and its partners may choose to do telephone interviews with candidate applicants before making a final decision.

VII. POST SELECTION ACTIVITIES

A. Budget and Scope

This Statement of Interest does not request a scope of activities or a budget. TxDOT will negotiate these once the recipient agency's mobility manager attends the CTAA training class. (TxDOT will reimburse recipient agencies for the travel costs of the mobility manager to attend the CTAA training class.) With the knowledge gained in the Transportation Solutions Coordinator class and the debriefing immediately following, the agency will be better positioned to propose a specific work program for the following nine months. However, TxDOT must have the governing body's authorization before entering into a contract.

B. Project Evaluation

A significant portion of the TxDOT grant will fund a formal evaluation process. Therefore an additional participant in the negotiations will be the university evaluation team. Each pilot will have a unique evaluation component that may include online surveys, interviews, focus groups, and specialized reporting. It is critical that the process for carrying out the evaluation be known at the time the work plan is finalized and TxDOT issues an interlocal cooperation contract.

ATTACHMENT A

STATEMENT OF INTEREST

UNITED WE RIDE MOBILITY MANAGEMENT PROJECT

*Use the following template to submit your Statement of Interest
This template is available in WORD format at*

http://www.txdot.gov/business/governments/grants/public_transportation.htm

under the heading, United We Ride.

1. Contact Person for this Statement of Interest

Name & Title
Agency
Address
Phone
Email
Fax

2. Which geographic area does your agency fit into? (Check all as applicable).

Urban
 Rural
 Border
 Region experiencing significant population change
 Region experiencing significant economic change

3. Indicate the geographic focus for this project. (Note: Agencies with multi-county service areas may, if desired, restrict this project to only a portion thereof.)

4. Does the agency have a mobility manager currently on staff (as defined in Attachment B)?

Yes (Name(s)) _____

Years of experience _____

No, but will have position filled by March 15, 2010. (Deadline for Statement of Interest to remain viable.)

5. How does the goal of the Texas UWR project, as stated below, align with your agency's coordination priorities for the next 12 months? (Maximum two pages)

Goal: *To simplify individual customers' access to public transportation by assuring that:*

- ◆ *Case workers and mobility managers from diverse agencies are fully informed of transportation resources and needs in their communities, and*
- ◆ *Diverse agencies integrate practices to assure individual customers' transportation needs are routinely and efficiently met as part of each agency's standard operating procedures.*

The focus of this project is on health, human service, education and workforce agency activities at the client level. TxDOT will be providing technical and financial assistance throughout the life of the project.

- 6. Briefly describe the agency's history with mobility management (limit to past four years)** (Maximum one page)

- 7. What is the current level of engagement with local state health, human service, education and/or workforce staff? Name specific agencies and give specific examples of interactions if possible.** (Maximum two pages)

- 8. What resources does the agency expect to have in place to continue the work of the pilot at the completion of the project?** (Maximum 1/2 page)

- 9. Attachments:**
 - **Job description for mobility manager. (required)**

 - **Letter of commitment from the authorized representative of the organization. See VI. A. 1 for content. (required)**

 - **Letter(s) from local health, human service, education and/or workforce office(s) expressing an interest in participating in the local pilot. (optional)**

ATTACHMENT B

MOBILITY MANAGER JOB DUTIES

The goal of mobility management is to meet the public's unmet transportation needs by coordinating among transportation providers, transportation planners and non-transportation providers (whether state/local government agencies, non-profit organizations or faith-based communities) who serve people with transportation needs.

For the purposes of this grant:

- The term *mobility management* also consists of coordination with agencies that do not provide transportation services, but serve people who need these services.
- The term *transportation services* includes not only those that may be offered by the agency who is selected as a recipient of this grant, but also those provided by the programs of other state/local government agencies, non-profit organizations and faith-based communities.
- The term *people with transportation needs* refers to those who cannot obtain their own transportation due to a disability, age, income, or access to a personal vehicle.

Mobility management consists of short-range planning, management activities and projects for improving coordination among public transportation and other transportation service providers with the intent of expanding the availability of services. The individual(s) whose mobility management activities are supported by this United We Ride grant must spend at least 80% of their time on the following types of activities.

Wayfinding

1. Receive inquiries and coordinate with partner agencies to develop person-centered plans to match individual travel needs to existing resources in the community
2. Assist people to navigate the transportation system
3. Coordinate and/or conduct travel training classes for riders, transit personnel and partner agencies to ensure that they are adequately trained to access transportation services
4. Develop customer information that explains the range of services and encourages rider responsibility for choosing the most appropriate and cost-effective option that will meet their needs

Outreach

1. Function as a community transportation advocate promoting accessible, affordable transportation options
2. Assist with the dissemination of transportation resources information
3. Coordinate outreach and awareness activities that enhance knowledge of the recipient agency's transportation functions and philosophy and promotes interagency coordination and integrated services
4. Communicate, collaborate, and form partnerships with agencies providing or needing transportation services to expand transportation options and seek efficiencies in doing so

Planning and Service Enhancement Activities

1. Research and identify unmet transportation needs and demands of users
2. Identify transportation solutions to resolve identified unmet needs
3. Cooperate with area transportation service providers to insure optimum transportation opportunities for customers in light of mandates, regulations, and expectations
4. Work toward a simple and uniform system of eligibility for all services. Develop incentives to encourage partner agency participation as needed
5. Develop new ways to remove barriers faced by people with transportation needs
6. Analyze routes and offer suggestions periodically to be most cost effective to riders and partner agencies
7. Assist/prepare grant funding proposals and search for possible additional funding opportunities to support expanded mobility options/services