SAN LUIS OBISPO COUNTY COORDINATED HUMAN SERVICES PUBLIC TRANSPORTATION PLAN

MARCH 15, 2016

PREPARED FOR:

SLOCOG
SAN LUIS OBISPO COUNCIL OF GOVERNMENTS

PREPARED BY:

GRIDWORKS

Solutions at the Intersection of Access + Mobility
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About the Coordinated Plan

The Coordinated Human Services Public Transportation Plan identifies needs of transportation-disadvantaged populations in San Luis Obispo County, such as seniors, individuals with disabilities, and people with low incomes. The plan then provides recommended strategies and actions for meeting these needs, and prioritizes transportation services for funding and implementation. This update to the Coordinated Plan covers fiscal year 2016-2017 through fiscal year 2021-2022.

About San Luis Obispo Council of Governments (SLOCOG)

The San Luis Obispo Council of Governments (SLOCOG) is an association of local governments, including seven cities (Arroyo Grande, Atascadero, Grover Beach, Morro Bay, Paso Robles, Pismo Beach, and San Luis Obispo) and the County of San Luis Obispo. SLOCOG's prime responsibilities include transportation planning and funding for the region, while also serving as a forum for the study and resolution of regional issues.

About Regional Rideshare

A division of the San Luis Obispo Council of Governments, SLO Regional Rideshare provides a range of transportation resources to the communities of San Luis Obispo County, including youth and senior programs, personalized trip planning assistance, live travel updates, transit information, 511 travel information, road conditions, and other commute resources.

About GridWorks

GridWorks is a Portland, Oregon based consultancy whose expertise lies where transportation intersects with health, housing, and equity. GridWorks collaborates with clients to design, implement and evaluate transportation solutions in industries where transportation makes a difference including healthcare, housing, land use and education.

ACKNOWLEDGEMENTS

We wish to thank the many organizations and individuals who helped to bring the Coordinated Human Services Public Transportation Plan to its completion.

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EXECUTIVE SUMMARY

The San Luis Obispo Council of Governments (SLOCOG) and its regional partners are committed to building a sustainable transportation system. SLOCOG recognizes the critical role of human service transportation in facilitating the access, mobility, and equity goals of the regional transportation plan. Seniors, people with disabilities, and people with lower incomes experience greater barriers when it comes to accessing goods and services in the region. While a number of services exist to meet the needs of transportation disadvantaged individuals, more can be done to improve coordination of these services in the region.

The 2015 Update has simplified the recommendations to a total of five (5) priority actions that will help the region achieve three (3) priority outcomes. The chart below depicts the three outcomes with associated actions.

Figure 1: Recommended actions in support of 3 priority outcomes.

Priority Outcome #1: Improve communication and coordination among local agencies involved in all levels of coordinating social service and public transportation programs.	
Action 1.1	SLOCOG to establish an MOU with Ride-On covering CTSA expectations.
Action 1.2	Transition Regional Mobility Management Functions toward Support of SSTAC & 5310 Programming.
Priority Outcome #2: Increase independence among seniors and people with disabilities.	
Action 2.1	SLOCOG to consolidate travel-training functions and seek professional services through an RFP to provide regionalized travel training.
Priority Outcome #3: Increase transportation options for low-income families and workers.	
Action 3.1	Ride-On to expand supports for community-based transportation services.
Action 3.2	SLOCOG to work with Caltrans to coordinate 5310 grant program to fund and implement other innovative projects.

Key Issues Addressed In This Plan

With this plan update, SLOCOG and their coordination partners aspire to not only meet FTA requirements for establishing a Coordinated Plan, but also to answer a number of important questions facing the region. A few key questions about the Coordinated Plan are summarized below.

What has been done since the 2007 plan was adopted?

The 2007 plan identified 3 goals, 15 objectives and 53 "implementing actions." For a variety of reasons, the majority of the implementing actions were either not implemented or were only partially implemented. We explore these reasons in further detail in Chapter 3 of this plan, but in a nutshell, we attribute the limited success of the prior plan in large part to the complexity of the prior plan's implementing actions and ambiguity in the roles and responsibilities of the Regional Mobility Manager and the local CTSA. Accordingly, much of the focus of this planning effort has been dedicated to simplifying the recommended actions and clarifying the roles and responsibilities of the key partners. This plan outlines 5 recommended priority actions with clear roles and responsibilities for SLOCOG, Rideshare, and the CTSA.

How has the landscape changed in the past seven years?

This coordinated plan includes findings from a landscape scan of policy, economic, and technological changes that have occurred since adoption (Chapter 1); review of existing conditions and available resources in the region (Chapter 2); and an assessment of needs and priorities of stakeholders across the county (Chapter 3). One key takeaway from these activities is that the needs of low-income individuals and families have become more pronounced. We find that the transportation needs of low-income residents have grown as growing housing prices have pushed affordable housing further from job opportunities, resulting in longer commute times. This has occurred in parallel with the loss of dedicated federal funding specifically earmarked for Job Access Reverse Commute projects. While many beneficial policies have been introduced to assist seniors and people with disabilities, stakeholders interviewed for this project expressed a lack of tools and resources to meet the needs of the local low-income population.

As such, while it is no longer a requirement under the FTA 5310 program to consider the needs of low-income populations as part of the Coordinated Plan, we felt it important to address these needs by demonstrating how the 5310 and LTF funds can be used to offset demand for ADA paratransit, thereby freeing those funds available for public transportation but increasingly consumed by growing ADA paratransit demand to be used to meet the emerging needs of low-income commuters.

What gaps exist in the local system?

Our functional assessment outlined in Chapter 3 identifies a need for improved travel training and mobility options counseling. This stems from the priority outcomes stakeholders identified including seniors and people with disabilities having the ability to travel confidently and independently on the public transportation system. We find that current travel training programs can be enhanced to go beyond system orientation to cover more in-depth travel training for individuals who experience physical or cognitive barriers that can be overcome with proper training and coaching.

What roles should the Regional Mobility Manager and CTSA play?

We recommend SLOCOG and its partners begin thinking differently about the term "Mobility Manager." Because mobility management is a collection of functions, it is a misnomer to designate a single entity as the Regional Mobility Manager; Ride-On and Rideshare are both mobility managers in the sense that they both perform mobility management functions. To say only one entity is a Mobility Manager and another is not does not convey the meaning of mobility management. Mobility management is a team endeavor. The functional assessment in Chapter 3 presents the different mobility management functions and explores the different aptitudes that Rideshare and the CTSA each have in performing them.

We recommend the regional partners cease using the term Mobility Manager in reference to the role that any particular entity plays. Instead, the various coordinating partners should speak to the specific mobility management functions that need to be performed. In Chapter 5 we have made specific recommendations about what roles and functions Rideshare and the CTSA should play.

Motivations for Preparing this Plan & Applicable Funding Sources

There are two primary motivations for completing this plan. First, this plan enables the San Luis Obispo Region to continue receiving federal transportation funding for seniors and people with disabilities through the Section 5310 program by providing a roadmap for improving coordination of local and regional human service transportation programs.

Second, as part of this roadmap, this plan lays a foundation for improving collaboration among the local coordination partners through measures such as the recommended Memorandum of Understanding and more clarified roles of Rideshare and Ride-On.

This Coordinated Human Services Public Transportation plan prioritizes two critical funding sources for human service transportation, each of which are described in further detail below.

- Federal Section 5310 Funding, also known as Enhanced Mobility for Seniors and People with Disabilities
- Local Transportation Fund (LTF) proceeds supporting Social Service transportation under the auspices of the local CTSA

Federal Funding & The Coordinated Plan Requirement

Section 5310 of the federal transportation funding statute provides funding for Enhanced Mobility of Seniors and People with Disabilities. The Section 5310 program has historically provided as much as $600,000 per year to support specialized transportation services for seniors and people with disabilities in San Luis Obispo County.

In 2005 congress passed the "Safe Accountable, Flexible and Efficient Transportation Equity-A Legacy for Users" (SAFETEA-LU) Act. At the time of its passage, SAFETEA-LU included a new requirement for recipients of Section 5310 funds to prepare a Coordinated Human Services Public Transportation Plan (Coordinated Plan). The Coordinated Plan requirement continues under the current federal transportation funding legislation, Fixing America's Surface Transportation (FAST) Act.

Similar to the original mandate, Coordinated Plans prepared after passage of the FAST Act legislation must address the following elements:

- An assessment of available services identifying current providers (public and private);
- An assessment of transportation needs of seniors and people with disabilities;
- Strategies to address the identified gaps between current services and needs, as well as, opportunities to improve efficiencies in service; and
- Priorities for implementation based on resources.

Organizations and other entities seeking funding through the 5310 grant program must show that their activities are identified in the locally developed Coordinated Plan.

LTF Funds & CTSAs

California's approach to coordination is markedly different from most other states. In the 1970s, California's legislature passed the Social Service Transportation Improvement Act AB 120 enabling local governments to set aside 5 percent of the Local Transportation Fund proceeds to support formation and operation of Consolidated Transportation Services Agencies, or CTSAs. San Luis Obispo's CTSA, Ride-On, was formed in 1993 under United Cerebral Palsy. Today Ride-On's services

are made up of two major human service contracts – one with CenCal for Non-Emergency Medical Transportation for individuals who require a wheelchair lift-equipped vehicle to access medical services, and one with Tri-Counties Regional Center. In addition to these contracts, the Ride-On CTSA provides senior shuttles, vanpools for agricultural workers, a Community Interaction Program for people with developmental disabilities to get around on nights and weekends, private pay transportation, and technical support to social service agencies.

Key questions related to this plan and the CTSA include how LTF funds are used by the CTSA and whether proposed technology investments currently being studied by Ride-On under a Mobility Services for All Americans (MSAA) grant should be considered a priority for funding under this plan.

- **How should LTF Funds claimed by the CTSA be spent?** The LTF funding comes down to the question of how LTF funds should be allocated among the CTSA's various transportation programs and whether the funding is being used as originally intended. This topic will be addressed when SLOCOG and Ride-On develop the recommended Memorandum of Understanding for the CTSA.

- **Should technology investments be a priority in this coordinated plan update?** Regarding the MSAA study, Ride-On has recently received grant funding to develop technology for sharing ride information among local transportation providers as a means of swapping rides and increasing the visibility of available transportation options. This updated Coordinated Plan does not include brokerage or technology investments as a priority primarily because the other actions identified in this plan are simpler and less costly to implement, and have greater potential to achieve the priority outcomes identified in this plan. If the MSAA study finds that technology investments can be competitive with the other strategies identified in this plan in terms of cost benefit performance, we recommend the region amend this plan accordingly.

A Performance-Based Planning Framework

This plan was developed following a performance-based planning framework. This framework allows stakeholders to trace a thread from the outcomes they want to see back to the resources they invest, the actions they implement, and the measures they use to monitor performance. By identifying desired outcomes first, the logic model helps stakeholders find the best actions for achieving the desired outcomes and the resources needed to achieve them.

Figure 2: A Logic Model is a performance-based evaluation framework

A basic logic model was shared with stakeholders in April 2015 at the beginning of the planning process, to help focus the conversation on the types of outcomes the project stakeholders wanted to see as a result of the Coordinated Plan. The draft logic model was later updated with additional information from the analysis, assessment, and outreach activities. The full list of desired outcomes was then distilled down to three overarching priority outcomes that could be achieved within the context of the Coordinated Human Services Public Transportation Plan.

The final logic model is presented in Chapter 5 with the detailed recommendations and priority outcomes.

Planning Process: A Three-Pronged Approach

Each of the activities performed throughout the course of the coordinated planning process contributed to one of three equally important legs of the planning approach, as depicted in Figure 3 and further described in the following sections.

Figure 3: Three legs of the coordinated planning process
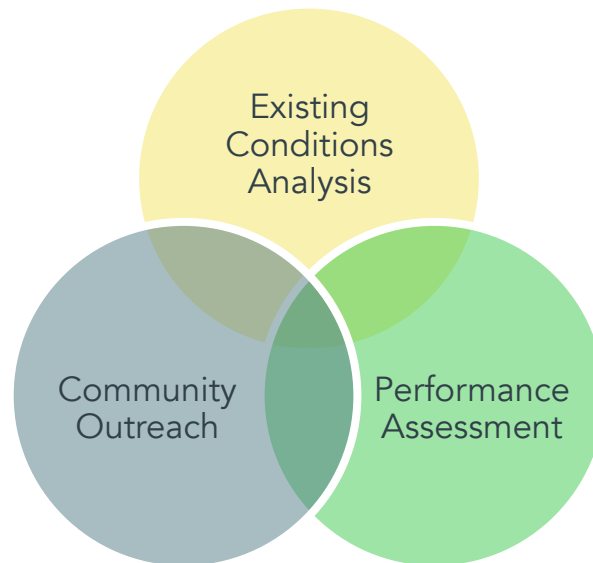
Existing Conditions Analysis

- **Inventory of Current Transportation Services** – A matrix of organizations providing different transportation services in the county, along with a supplemental list of existing transportation services, including service area, eligibility, and trip limitations.

- **Transportation Provider Survey** – An online survey of transportation providers about the capacity of their services, needs and opportunities, and level of interest in increased coordination.

Performance Assessment

- **Plans and Actions Review –** A review of current plans, studies, and recent activities related to social service transportation, including the series of Mobility Management Workshops.

- **Performance Evaluation of Prior Coordinated Plan –** A look back at the recommendations from the 2007 Coordinated Plan to understand which actions were not implemented and why.

- **Functional Assessment –** An analysis of different Mobility Management functions performed by Rideshare and Ride-On.

- **Stakeholder Interviews –** Interviews with over a dozen stakeholder organizations and individuals, including transportation operators and social service providers.

Outreach Activities

- **Intercept Surveys** – Intercept surveys were administered in Spanish and English to 88 individuals at free meal events, homeless shelters, community health screenings, bus stops, parks, and public libraries across the county.

- **Community Interviews** – Additional in-depth interviews were conducted with three seniors and individuals with disabilities in the community, providing unique perspectives regarding the effectiveness of available transportation options.

- **Project Kickoff Meeting with Stakeholders** – The kickoff meeting where stakeholders identified preliminary desired outcomes to guide development of the Coordinated Plan.

- **Mobility Management Workshop** – The third in a series of yearly workshops intended to engage stakeholders on issues around mobility management for transportation-disadvantaged populations in the county.

Table 1. Project outreach timeline.

TIMELINE OF EVENTS	
2015	April and May: Project Kickoff meeting and Stakeholder Interviews
	June: Develop survey and initiate major project deliverables
	July: Survey and major project deliverables completed
	August 22: Project workshop and additional public outreach
	September: Roles and Responsibilities development
	October 6-7: Mobility Management Workshop and interim board presentation on the development of the draft plan
	November 23: Draft plan distributed to SLOCOG committees - beginning of 30-day comment period
	December 16: Presentation of draft Coordinated Plan at a board hearing
2016	January & February: Incorporate all feedback from the public comment period into the Final Coordinated Plan
	March & April: Final Coordinated Plan to be presented for adoption

CHAPTER 1: THE CHANGING LANDSCAPE OF TRANSPORTATION COORDINATION

Much has happened since 2007 when the last Coordinated Human Services Public Transportation Plan for San Luis Obispo was completed. That year Apple released the first iPhone, ushering in the era of smart phones and exciting new transportation tools and industries, which was enabled largely by ubiquitous consumer access to Global Positioning System (GPS) and mobile Internet. The following year marked the start of the worst economic recession since the great depression, a crisis that many regions are only just now climbing out of. Technological, economic, and policy changes have all impacted the way we provide transportation as well as our ability to coordinate services. In this chapter we discuss some of the policies and factors impacting coordination of human services transportation today and explore what they mean for San Luis Obispo County in the coming years.

FTA Section 5310 Program Changes

2012 brought a new transportation authorization bill known as Moving Ahead for Progress in the Twenty First Century, or MAP-21. A hallmark of the MAP-21 legislation was a simplification of the federal transportation code achieved through elimination of programs deemed to be redundant. As a result, programs such as the Federal Transit Administration's sections 5316 (Job Access & Reverse Commute, or JARC, in place since 1998) and 5317 (New Freedom, in place since 2005) discretionary programs were eliminated as standalone funding sources.

In the San Luis Obispo region, these funds had been used for operating support of reverse commute trips along the Santa Maria urban corridor and the North Coast rural corridor. Another use of the 5316 funds was the regional Mobility Management activities, managed by SLO Regional Rideshare per the 2007 Coordinated Plan recommendation. These projects remain eligible for funding under formula sections 5307 (urbanized) and 5311 (non-urbanized/rural) programs, although neither additional nor distinct funding was provided to continue operating job-access and reverse commute projects.

In the San Luis Obispo region, the 5317 funds had been used to develop information infrastructure for 511, subsidies toward senior volunteer driver programs, and operating support toward specialized transit. These projects are now eligible under the revised section 5310 program, now referred to as "Enhanced Mobility of Seniors and Individuals with Disabilities."

While many states and other regions have maintained access to JARC projects by "protecting" a percentage of 5307 funds, the SLO region has not chosen to do so. The main obstacle to such an approach (taken by several large counties in southern California) stems from the much smaller funding (Pre-MAP 21 versus Post-MAP 21). Since then, the net gain in 5307 or 5311 was not aligned with prior amounts available competitively, the end result would likely be: either a scaled back JARC budget or a below historical 5307 balance, itself the prime funding source for public transit in a small region. The State of California left FTA programming options open to each region while, for instance, giving any eligible party the choice to carve out JARC dollars in the annual 5311 Program of Projects; again, this was left up to individual regions and their operators. Keeping a grant simple

by only using one project type (such as rural operating assistance) saves time and effort in getting approval and securing such grant reimbursement.

The changes brought by MAP-21 also had important implications on planning. Coordinated Plans are no longer explicitly required to address the needs of populations of low income. However, given the needs identified in this and related plans, this change comes at a time when such individuals and their families are experiencing the greatest transportation challenges.

Based on current emerging trends, as well as interview input and prior plan review activities discussed in Chapter 3, this plan finds transportation for the region's residents of low income to be a chronic, pressing, and multi-faceted issue that is not being adequately addressed. This is not from a lack of effort by the region's transportation providers. More services are available today than ever before, including a county program to provide bus fare for trips to job interviews and a SLO Transit program to provide fare tokens for trips to the Prado Day Center and the Maxine Lewis Homeless Shelter. Yet for many low-income residents the cost of transportation remains prohibitively high. Making matters worse, many low-income residents throughout the county live more than ¼ mile from a bus route. While seniors and people with disabilities benefit from recent changes in policy such as the incorporation of operating dollars under FTA's Section 5310 program and the Final Ruling on Reasonable Modifications described below, many of today's transportation challenges fall squarely on the shoulders of low-income individuals.

FTA Final Rule on Reasonable Modifications

Transit agencies that operate as a curb-to-curb service must now make reasonable accommodations for people with disabilities who request door-to-door service. In March of 2015, the Federal Transit Administration released updated rules that require transit agencies to make reasonable modifications to services so that people with disabilities have full access to the public transportation system[1]. While the long-term impact of these new rules is unclear, we anticipate that some of the customer needs for door-to-door transportation may be met through observance of this new rule. Specifically, when ADA eligible seniors and people with disabilities request door-to-door transportation, transit agencies must now evaluate the request to determine if the modification can be made without fundamentally altering the service or creating a direct threat to the health or safety of others. Riders have recourse if an ADA transportation provider denies their request.

This differs from prior guidance from the FTA, which informally permitted ADA paratransit providers to claim a blanket policy of providing either door-to-door or curb-to-curb services. While this ruling will be beneficial to seniors and people with disabilities and will go a long way in meeting the need for more flexible ADA services, it may create a financial burden for fixed-route transit providers who will need to dedicate a larger share of their budgets to ADA paratransit services. As such, the final ruling has the effect of benefiting seniors and people with disabilities at the expense of other transit riders – of whom many are low-income.

Affordable Care Act & Medicaid NEMT

Nationally, Medicaid is the largest funder of human service transportation trips through the program's Non-Emergency Medical Transportation (NEMT) benefit. According to a Government Accountability Office report, total Medicaid funding for transportation is estimated at over $1.3 billion as of 2012[2]. As a comparison, this amount is over four times the total congressional

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[1] http://www.fta.dot.gov/newsroom/news_releases/12286_16374.html

[2] http://www.gao.gov/assets/670/667362.pdf

apportionment of $300 million in 2012 for FTA's Section 5310 program[3], Enhanced Mobility of Seniors and Individuals with Disabilities. Consequently, Medicaid spending is often a major driver of transportation spending in rural and small urban regions where funding for fixed-route transit service is limited. Indeed, the Medicaid program – MediCal in California, locally administered by CenCal – is the second largest share of net income for Ride-On's transportation program, behind funding from the Tri-Counties Regional Center.

Given the large role of Medicaid in human service transportation, recent changes in Medicaid enrollment brought on by the Affordable Care Act are likely to have an impact on transportation services. The Affordable Care Act became fully implemented in January 2014, when states were given the opportunity to expand Medicaid eligibility to low-income individuals in exchange for generous federal subsidies. California opted into an expanded Medicaid program resulting in a 37 percent increase in total MediCal enrollment as of May 2015, compared to Summer 2014 average enrollment[4].

Medicaid in San Luis Obispo County is provided through a Section 1115 Waiver allowing for local management through CenCal Health, a public entity governed by a 13-member board of directors appointed by the Santa Barbara and San Luis Obispo county boards of supervisors[5]. CenCal maintains its own protocols relating to non-emergency medical transportation (NEMT), including rules that limit NEMT to individuals who cannot use public or other private transportation services, and explicitly name taxi and public transportation as non-covered services. As such, NEMT services are generally only available to individuals who use a wheelchair or require a gurney transport. Ambulatory passengers are required to use public transportation at their own expense.

Nationally, the expansion of Medicaid has resulted in an influx of ambulatory individuals who tend to access mental and behavioral health services more frequently than the historic Medicaid population. As a growing number of low-income individuals seek these services under their new coverage, they will need transportation. However, under the current CenCal rules, the majority of these individuals will not be able to utilize NEMT services and will instead have to rely on local public transportation and other options. This could translate into an increase in ridership for fixed-route and ADA paratransit, as well as services provided by Ride-On and others. While this could lead to increased demand on the public transportation system, it is also an opportunity for enhanced collaboration with mutual benefits for riders, as well as healthcare and transit providers.

There is growing evidence that investments in transportation have downstream positive impacts on health outcomes. A 2005 study of the costs and benefits of NEMT services found a positive return on investment to the healthcare system for four specific health conditions (asthma, heart disease, diabetes, and pregnancy) when additional funds were spent on NEMT[6]. The study also found that investments in NEMT were highly cost effective for depression and mental health, as well as five other health conditions.

Historically, the NEMT program has been viewed by health plans as an area where funds can be saved through more efficient operations and strict limits on NEMT benefits. Under the Affordable Care Act, health plan providers in California and other states are now financially incentivized to focus on health outcomes. This shift creates an opportunity to leverage transportation in areas

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[3] http://www.fta.dot.gov/grants/15032.html

[4] http://www.medicaid.gov/Medicaid-CHIP-Program-Information/By-State/california.html

[5] https://www.cencalhealth.org/about_sbrha/introduction/index.html

[6] Hughes-Cromwick, P and Wallace, R (2005) Cost Benefit Analysis of Providing Non-Emergency Medical Transportation, Transit Cooperative Research Program, Washington DC, http://onlinepubs.trb.org/onlinepubs/tcrp/tcrp_webdoc_29.pdf

where there are known transportation barriers for individuals accessing quality healthcare. Given the positive impact transportation can have on improving access to preventive healthcare, new opportunities may exist to persuade partners such as CenCal to view transportation as an area for further investment.

Implications of an Improving Economy

As the U.S. economy recovers from the worst recession since the great depression, there are several emerging patterns that will have significant implications for transportation in the coming years. For the first time in nearly ten years, Americans are driving more, again. The estimated 12-month total of national Vehicle Miles Traveled (VMT) – a common measure of the amount of driving in the U.S. – increased by 2.8 percent in 2015[7] to reach an all-time peak of over 3 trillion vehicle miles traveled. When adjusted for population growth, per capita VMT is still below the 2005 peak, which many experts point to as the end of the driving boom. Nevertheless, automobiles in America remain the dominant mode of transportation.

The underlying causes of the increase in driving are not well understood but are likely related to increasing employment rates. Figure 4 shows total VMT relative to total U.S. employment over the past twenty-five years. As underemployed Americans go back to work, driving patterns are returning to pre-recession levels.

Figure 4: Employment and vehicle miles traveled, 1991-2015

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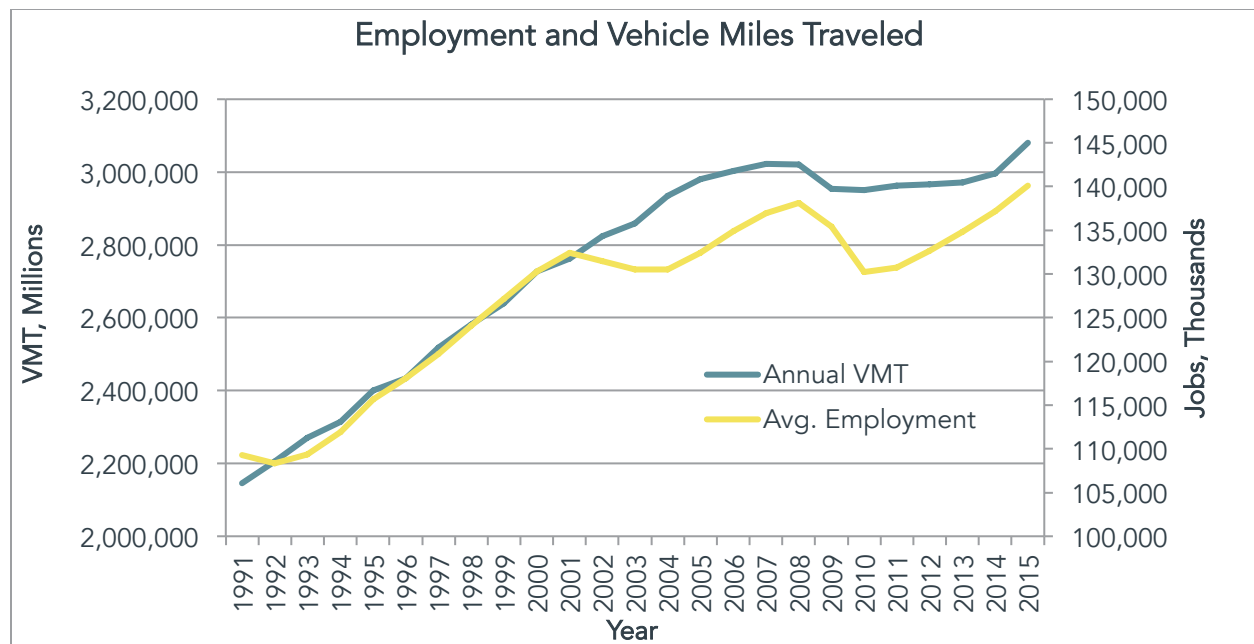
[7] Traffic Volume Trends, May 2015, U.S. Department of Transportation Federal Highway Administration

The second major trend we are watching related to the economy is the widening income gap between rich and poor Americans. While the employment outlook continues to improve throughout the U.S. – including in San Luis Obispo – wages of the lowest income workers remain stagnant. Nationally, reduced purchasing power among low-income workers, combined with rising costs of housing and transportation, have resulted in changes to urban settlement patterns over the past decade. The San Luis Obispo Regional Transportation Plan echoes a similar theme relating to rising housing prices and the difficulty lower-income households face in gaining affordable housing near their place of work.

Combined, these two themes present a challenging future for low-income commuters: driving alone continues to be among the easiest and fastest choices for commuters who live increasingly far from their place of work, yet it is increasingly the most expensive. As the cost of personal transportation increases with fuel and insurance prices, transit modes that are competitive in terms of affordability and speed will help ensure low-income individuals have access to work opportunities.

Impact on San Luis Obispo County

As the economy continues to change, policy changes are implemented, and new transportation providers expand services, communities must continually adapt. In San Luis Obispo County this not only means adapting to satisfy different policy requirements, it means figuring out how to satisfy them in order to provide for the evolving needs of all its residents. In the next chapter, we look at the people and services currently available in San Luis Obispo County and begin to explore the new needs and opportunities that have arisen in the years since the 2007 Coordinated Plan.

CHAPTER 2: LOCAL CONTEXT & CONDITIONS

In this chapter we look at the makeup of San Luis Obispo County, including the existing conditions for transportation-disadvantaged populations. We also present and discuss the inventory of transportation services compiled during the course of the coordinated planning process.

County Profile

San Luis Obispo County is home to a diverse economy that includes strong contributions from a number of sectors such as agriculture, education, and tourism. The county is home to nearly 280,000 people, over 17% of who are over the age of 65. Over 6% of the county's population under age 65 have a disability. 15% of the population lives at or below the poverty line.

Table 2: San Luis Obispo County Quick Facts

San Luis Obispo County Quick Facts from the U.S. Census Bureau	
Land area in square miles (2010)	3,298.6
Persons per square mile (2010)	81.7
Population (2014 estimate)	279,083
Population 65+ (2014 estimate)	48,840
Percent persons 65 and over (2014)	17.50%
Population under 65 with a disability (2009-2013)	17,580
Median household income (2009-2013)	$58,697
See the Community Health Status Report, the 2016-2017 Community Action Plan, the RTA/SLO City SRTP, and the Ride-On Future Strategies Report for more detailed population analysis.	

Recent plans prepared for SLOCOG include extensive demographic analyses of the region, including data about seniors and people with disabilities. For this reason, we do not include a detailed demographic analysis in this study and instead draw from the findings of of these recent reports, including the Community Health Status Report from the County Department of Public Health, the 2016-2017 Community Action Plan from CAPSLO, the 2015 Ride-On Strategic Plan and Future Strategies Report, and the ongoing RTA/SLO Transit Joint Short-Range Transit Plan. Each of these reports point to a large population of low-income families and individuals spread out across the county.

Focus: Income and Poverty

At $58,700, San Luis Obispo County sits just below the state average in terms of median household income. This is not unexpected, given that there are many small towns, large rural areas, and a relatively high number of college students in San Luis Obispo.

Conversely, the percentage of residents at or below the poverty line is lower than the state average (14.3% to 15.9% respectively). While this is a reasonable big-picture indicator that the county may

be doing better economically overall, such countywide metrics do little to show how people are doing on the ground.

As can be seen below in Figure 5, about 20% of all households in the county receive less than $25,000 in annual income. While this is somewhat lower than where the county was at the time of the last Coordinated Plan, one fifth of the county's households are likely to struggle keeping up with the expenses of car ownership.

Figure 5: Households in SLO County by income bracket[8]
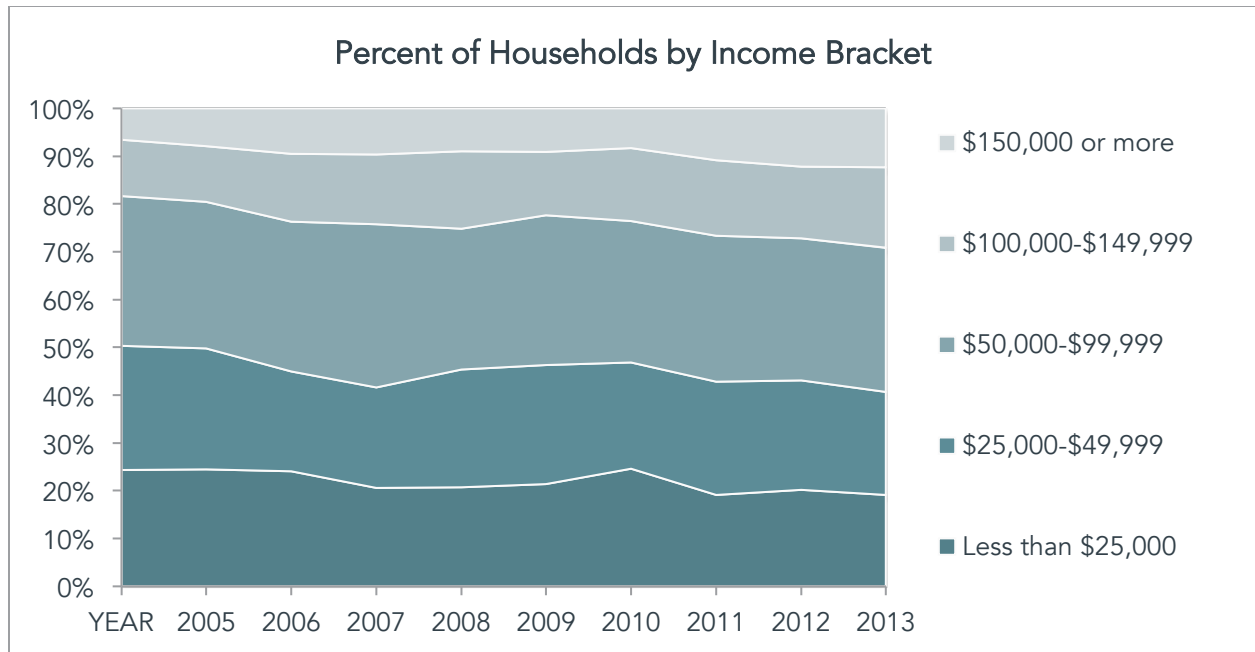
When compared to higher-income workers and families, low-income individuals and families are more likely to rely on public transportation to get to work, school, daycare, or the grocery store. According to the 2016-2017 Community Action Plan of the Community Action Partnership of San Luis Obispo (CAPSLO) workers who rely on public transportation to get to work in San Luis Obispo County have a median income that is 64% less than those who drive alone to work. For the county's farmworkers and others who work or live in low-density areas, the hours, days, and range of available public transit is limited, if it is available at all.

A lack of adequate transportation is a barrier for the county's homeless population as well. According to the 2015 Homeless Point-In-Time Census & Survey for San Luis Obispo County, as of January 15 there were 1,515 homeless persons who met the U.S. Department of Housing and Urban Development (HUD) definition of homelessness in the county, over two-thirds of whom were living unsheltered. In addition, there were 229 homeless individuals reported by the County Office of Education, a number that could not be verified for inclusion in the HUD report. The HUD count includes young people, seniors, and families all over the County. The report included a survey of homeless individuals in the county, in which a lack of transportation was cited among the top five obstacles to obtaining permanent housing.

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[8] U.S. Census Bureau American Community Survey 3 year estimates

Since the 2007 Coordinated Plan, the county has made strides in planning for and providing more quality transportation service for seniors and people with disabilities. But given the spread-out nature of the county's low-income populations it is possible that some individuals, who do not qualify for targeted programs, are slipping through the cracks.

Available Transportation Services

There are over 65 different entities providing some sort of transportation service in San Luis Obispo County. They range from fixed-route and demand-response public transportation operators to taxi companies, and social service organizations to small private tour operators. Basic information on these organizations is included in the comprehensive transportation inventory in Appendix A.

Realistically, many of the transportation providers in the county presently have little to no role in providing human service transportation beyond their direct constituencies. For example, many churches limit transportation to members of their congregation to and from church services. Similarly, many of the smaller private for-profit operators specifically provide transportation for special events such as wine tours. While these organizations may not directly provide social service transportation to the community at large, their presence indicates a strong demand for transportation services of all sorts within the region, as well as a potentially robust base for coordinated driver training or volunteer driver programs.

Consolidated Transportation Service Agencies

The Social Service Transportation Improvement Act, also known as Assembly Bill 120, codified under California Government Code Title 2, Division 3, Part 13, designates Consolidated Transportation Services Agencies (CTSAs) throughout California counties. The original intent of establishing CTSAs was to promote "the consolidation of social service transportation services to improve the cost effectiveness, quality, and efficiency of existing social service transportation programs." Specific activities identified in the CTSA legislation include:

- Combined procurement of equipment to achieve bulk purchase discounts.
- Consolidated training of drivers to reduce risk and insurance cost and to improve service quality.
- Centralized dispatch, maintenance, and administration to achieve economies of scale and other efficiencies.
- Consolidated funding for social service transportation.

In exchange for performing these functions, CTSA's are eligible to claim up to five percent of the Local Transportation Fund (LTF) funding allocated for the region.

Key Transportation Services

Of the many transportation service providers in the county, there are four entities that sit at the center of the region's Coordinated Plan. Together, Rideshare, Ride-On, RTA, and SLO Transit are the primary transportation coordination partners in the County, each playing key roles in the overall transportation system.

- **Consolidated Transportation Service Agency (CTSA): Ride-On Transportation/United Cerebral Palsy.** Ride-On is a non-profit transportation provider serving San Luis Obispo County with a range of transportation services that includes everything from day program access among developmentally disabled clients, senior shuttles and MediCal NEMT, to wine tours and special event transportation. As the county's Consolidated Transportation Services Agency (CTSA), Ride-On is charged with facilitating coordination of transportation services throughout the community.

- **Regional Mobility Manager: Rideshare.** Regional Rideshare is a subsidiary of the San Luis Obispo Council of Governments (since 2007). Through their website, local phone number, and community outreach they provide information on transportation options for residents, visitors, and commuters in and around San Luis Obispo. Rideshare hosts the 511 travel information database for the county, and connects users to a wide range of transportation services including vanpool providers and transit travel training for seniors and people with disabilities. They also serve as the regional Mobility Manager, primarily through the "Know How to Go!" program.

- **Transportation Authority: SLO Regional Transit Authority (RTA).** RTA is the public transportation authority for the region, providing regional fixed-route transit and ADA paratransit across the county. They also operate or administer local fixed-route and dial-a-ride services on behalf of a handful of cities and communities within the County, including Paso Robles, Nipomo, and the Five Cities Area (South County Transit). RTA also manages established senior van contracts, which receive a mileage allowance and tap into volunteer drivers.

- **Urban Transit Operator: SLO Transit.** The City of San Luis Obispo contracts with a private company that operates eight fixed-route transit lines within the city, including a trolley through downtown. These lines bring riders into the central city area, with a total of 4 routes serving the North side of town to serve the California Polytechnic State University campus, adjacent to the city center.

Inventory of Transportation Services

In addition to the four entities listed above, the region is home to a wide range of organizations that provide some sort of transportation service, including non-profit social service agencies, churches and faith-based organizations, taxi companies, limousines, and private wine tour operators. A full list of transportation providers is included in Appendix A. For each entity, the list features the organization name, type, contact name, email, phone, website, and source of information.

43% of the 65 transportation providers inventoried were churches, senior services, or human service transportation. Another 43% consisted of private providers offering various combinations of taxis, shuttles, and tours. Figure 6 breaks down these organizations by the type of services they provide. Because Ride-On and Rideshare each offer a variety of transportation related services, they are classified as "Various" in this chart.

Figure 6: Inventory of transportation providers by type of service, July 2015.

Transportation Providers by Type

(Pie chart data)
- Vanpool: 2
- Travel Training: 2
- Various: 2
- Transit: 4
- Taxi/Shuttle/Tours: 27
- Social Service: 28

(Social Service breakdown)
- Human Service: 11
- Church: 10
- Senior Services: 7
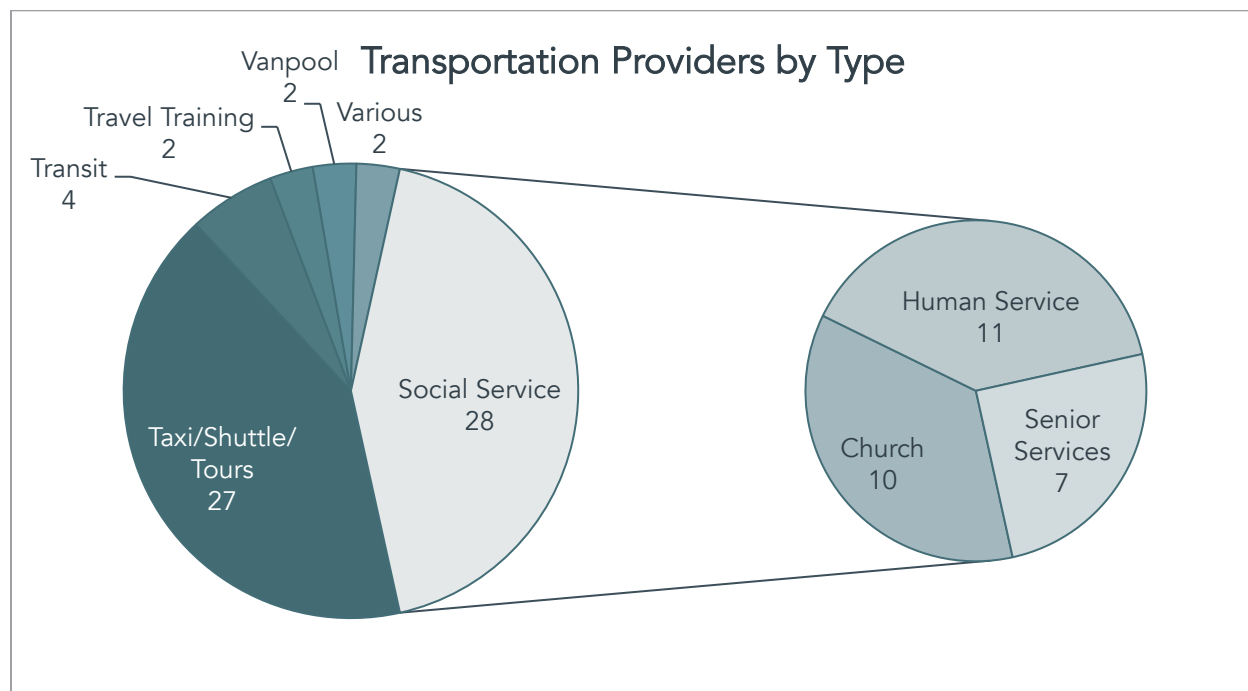
A number of these organizations could become partners in coordinating different transportation services, such as volunteer driver pools or driver training. In particular, the following providers already offer at least one transportation service and have expressed interest in specific coordinated transportation services:

- **Amdal In Home Care.** Amdal recently started providing an alternative non-emergency, wheelchair accessible transportation service for people with disabilities. Though it has been used most often for discharge transportation from hospitals and care facilities, the service is available for all trip purposes, with the goal of providing safe transportation without restrictions. These services could be particularly helpful for riders with attendants.

- **CAPSLO.** The Community Action Partnership of San Luis Obispo provides a suite of human service programs to disadvantaged populations, including transportation for the Head Start program. They operate the Prado Day Center, providing meals and services for individuals who are homeless, and the Maxine Lewis Homeless Shelter in San Luis Obispo. Additionally, they have staff that often ends up providing necessary transportation for their clients, despite a lack of formal driver training. With appropriate training and support CAPSLO and other human service organizations could help augment a coordinated volunteer driver program, either by partnering with a volunteer transportation service or by making driver training available to their staff.

- **SLO Safe Ride.** SLO Safe Ride started out four years ago as a way for people to enjoy downtown nightlife without the worry of having to drive home later. They have expressed interest in utilizing their growing fleet of commercial vans, buses, and smaller vehicles to help meet daytime transportation demand.

- **Ventura Transit System - West Coast Paratransit.** As the region's Yellow Cab operator, Ventura Transit System operates taxis across most of the County as well as other services in nearby counties. They already are a MediCal NEMT provider in Ventura County and have expressed interest in providing more on-demand daytime trips to supplement Runabout and Ride-On services.

- **Wilshire Community Services.** The Wilshire Good Neighbor Program relies on committed volunteers to provide assistance to seniors and people with disabilities in the community, including transportation. The transportation component of the Good Neighbor Program is an excellent starting point for building a more robust volunteer driver pool.

There are over 50 transportation services being offered in the county by public, private, and non-profit organizations. These services range from fixed-route buses and dial-a-ride services, to shuttles, vanpools, and other transportation options. The majority of these are provided by Ride-On, RTA, and SLO City Transit. The complete list of services is included in Appendix A.

Takeaways from the Transportation Inventory

Overall, San Luis Obispo County has a wide range of services given its size. However, despite the high overall number, the proportion and distribution of services for transportation-disadvantaged populations are areas of concern. The inventory illustrates potentially critical gaps in services for individuals who rely on transportation, as well as a few other observations:

- **Many services are limited by geographic area**. Only 12 of the 52 transportation services describe themselves as county-wide. Some of these are still limited by capacity and schedule. A majority of the remaining transportation services that limit their service area, don't cross city lines. For example, Atascadero Dial-A-Ride is limited to the city limits of Atascadero and most of the routes stay within the city of origin. Less than half (nine of 22) of the fixed-route services cross a city line (not counting the boarder between San Luis Obispo city and Cal Poly).

- **There are a large number of private sector transportation providers**. 42% of transportation providers in San Luis Obispo County are in the private sector. While a large number of these primarily provide tours, many provide shuttle or taxi services such as Surf Cab Co and Ventura Transit System.

- **Low-income populations are underserved**. While there are nine transportation services tailored toward persons with disabilities, and seven that have age requirements, only one is meant specifically for people of low-incomes. SLO City Transit's program providing free tokens to homeless persons traveling between the Prado Day Center and the Lewis Homeless Shelter is the only formal program focused on low-income persons. The somewhat informal homeless transportation service provided by CAPSLO also serves persons with low-incomes or in poverty, though it is severely limited due to a lack of funding for dedicated staff and vehicles. The service is only provided for people with urgent needs.

These takeaways will be explored further in the following chapters. In the next chapter, we describe the activities performed during this planning process, and incorporate the takeaways above to identify specific needs that this plan should address.

Funding For Human Service Transportation

While the FTA requirement for developing a Coordinated Human Service Public Transportation plan is specific to the Section 5310 Enhanced Mobility for Seniors and People with Disabilities program, there are a wide range of state and federal funding sources for Human Services

Transportation. Recent studies by the Government Accountability Office (GAO) have identified more than 80 individual human service transportation programs funded by the Federal Government[9]. The largest source of federal funding for human service transportation, for example, is from Medicaid for Non-Emergency Medical Transportation to necessary medical services for Medicaid beneficiaries. Other major programs include Medicaid long-term care waivers, Vocational Rehabilitation, Head Start, Temporary Assistance for Needy Families, Older American's Act Title III-B, and a variety of Workforce Investment Act programs.

The primary objective of this coordinated plan is to recommend priorities for the Federal Section 5310 and LTF funding sources.

- **FTA Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities.** At the national level, the Federal Transit Administration has apportioned $257 million[10] for the 5310 program for fiscal year 2015. This is comparable to the amounts apportioned in 2013 and 2014. Of the 2015 amounts apportioned by the Federal Transit Administration, approximately $28.4 million was apportioned to California[11].

  In December of 2015 President Obama signed into law the Fixing America's Surface Transportation (FAST) Act, the first long term federal transportation funding bill in over 10 years. The FAST Act provides states and local governments much needed certainty around federal transportation funding. The FAST Act authorizes approximately 2 percent increases in the Section 5310 program over the 5-year period of the bill.

  The Federal Transit Administration distributes section 5310 funds on a formula basis to states. Caltrans distributes 5310 grants competitively within the state, meaning the amount awarded in any particular region can swing greatly from year to year.   Based on historic trends and anticipated future needs in the region, we anticipate approximately $400,000 – $550,000 available through the 5310 program, 55 percent of which must be applied to traditional capital projects such as vehicles, equipment and technology, leaving the remainder available for expansion projects including operating expenses and "mobility management."

- **CTSA LTF Funds.** Under the Public Utilities Code, the TDA allows up to 5 percent of Local Transportation Funds (LTF) to be claimed by the CTSA. Historically LTF amounts claimed by the CTSA have averaged approximately $550,000 per year.

This plan interfaces with additional funding sources but does not have jurisdiction over them. It may be appropriate to encourage recipients of those funds to work with recipients of 5310 funds to leverage their dollars to the greatest extent possible, such as by including these other funding sources as match for 5310 grants.

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[9] Government Accountability Office, Coordination Efforts are Underway, but Challenges Continue. Accessed March 2, 2016, at http://www.gao.gov/assets/660/658766.pdf

[10] Table 1: Fiscal Year 2015 Appropriations and Apportionments for Grant Programs - Full Year Accessed November 6, 2015 at http://www.fta.dot.gov/12853_16536.html

[11] Table 8: Fiscal Year Section 5310 Enhanced Mobility of Seniors and Individuals with Disabilities Apportionments - Full Year Accessed November 6, 2015 at http://www.fta.dot.gov/12853_16552.html

CHAPTER 3: IDENTIFYING NEEDS

This chapter summarizes the analysis activities performed during the planning process and describes the needs that were identified. Analysis activities fell into one of two categories. The activities in the first category were designed to assess the existing organizations and services available based on performance measures and expectations from coordinating partners. The second set of activities involved collecting feedback from the community to understand how users experience available transportation services in the real world. The insights gleaned from each set of activities led to a list of identified needs used to guide the strategies outlined in subsequent chapters.

Performance Assessment Activities

The performance assessment activities included the following:

- **Plans and Actions Review.** A review of current plans and studies, and recent activities related to social service transportation, including the series of mobility management workshops

- **Performance Evaluation of Prior Coordinated Plan.** A look at the recommendations from the 2007 Coordinated Plan to understand what worked as well as which actions were not implemented and why

- **Functional Assessment.** An analysis of mobility management functions performed by Rideshare and Ride-On

- **Stakeholder Interviews.** Interviews with over a dozen stakeholder organizations

Plans and Actions Review

The San Luis Obispo Region is the subject of numerous plans, studies, and evaluations relating to public and alternative transportation. There is a great deal of planning work currently underway among transportation providers. For this coordinated plan update we reviewed the following plans, studies, and activities:

- **2015 RTA/SLO Transit Joint Short-Range Transit Plan.** RTA and SLO Transit are currently working with a consultant to jointly update their short-range transit plans.

- **Ride-On Transportation Plan and Future Strategies Report.** The Ride-On Transportation Plan and Future Strategies Report was completed in May 2015, and covers Ride-On's function as both a Transportation Management Association (TMA) and Consolidated Transportation Services Agency (CTSA).

- **2014 Transit Needs Assessment Update.** The 2014 Transit Needs Assessment Update, completed by SLOCOG, covers recent changes and developments in transportation options in the region. It includes a helpful summary of transit options by jurisdiction (Figure 1-a), an assessment of service coverage, review of ridership trends for fixed-route providers, and a summary of known deficiencies in the system. This summary mirrors the 2007 Coordinated Plan framework in identifying needs encountered by those groups using regular bus transit.

- **2014 Mobility Management Workshop.** The second annual Mobility Management meeting was styled as a workshop and facilitated by Hunter Harvath, Assistant General Manager of

Monterey-Salinas Transit (MST). The 2014 event focused on how and why clients of the participating agencies use the transportation system.

- **SLO and RTA 2014 Transportation Development Act (TDA) Performance Audits.** TDA performance audits were conducted for SLO Transit and RTA in May and June, 2014, respectively. These audits contain detailed operating and performance data for both services and recommendations for improvements.

- **2014 Regional Transportation Plan.** The 2014 Regional Transportation Plan outlines a long-range vision for transportation in the San Luis Obispo region. It emphasizes livable communities, public transit and active transportation as a means of supporting more active and healthy lifestyles among the region's residents.

- **2013 Mobility Management Summit.** The 2013 Mobility Management Summit was the first annual meeting focused on Mobility Management for the region. It marked a renewed focus on human service transportation in the San Luis Obispo area.

- **2007 Coordinated Human Services Transportation Plan.** The 2007 Coordinated Plan provides an assessment of existing transportation options for seniors, people with disabilities, and people with low incomes.

A summary of each review is included in Appendix C.

Performance Evaluation of Prior Coordinated Plan

The 2007 Coordinated Plan includes three overarching goals, 15 objectives and 53 "implementing actions." Each of the implementing actions was reviewed to determine its current status and impact. Each implementing action was rated as "Implemented," "Partially Implemented," or "Not Implemented." Barriers preventing implementation of actions classified as either partially or not implemented were assessed. The complete evaluation is included in Appendix C.

Figure 7: Summary of implementation assessment of prior coordinated plan.

	Implemented	Partially Implemented	Not Implemented
Goal 1.0 – Coordination Infrastructure	29%	29%	37%
Goal 2.0 – Build Capacity to meet Needs	4%	29%	67%
Goal 3.0 – Information Portals	25%	50%	25%

Functional Assessment

A functional assessment employs a matrix to define the full spectrum of Mobility Management functions relative to the entities that perform them. The matrix helps document existing conditions, indicating whether each function is a strength, a weakness, not performed at all, or is not applicable. This tool enables quick identification of overlapping roles and gaps in functional capacity. By focusing on the relative strengths and weakness of partners, it also identifies practical opportunities for coordination.

The framework used to assess the performance of Mobility Management functions in San Luis Obispo County is presented in Table 3 below. Functions are arranged under three primary categories: 1) making the case, 2) promotion and awareness, and 3) day-to-day transportation system operations.

Table 3: Continuum of Mobility Management functions.

Category	Mobility Management Function
Making the case	Advocacy
	Fund development
Promotion, Awareness	Marketing
	Information and referral
	Mobility options counseling
	Travel training
Day-to-day transportation system operations	Customer intake, eligibility
	Scheduling and dispatch
	Service delivery
	Driver screening, training
	Vehicle maintenance, insurance
	Mileage reimbursement

The functions are organized in chronological order and reflect the life cycle of a mobility management investment. While some functions reflect best practices, others are basic requirements for delivering services in any given community. Most of these functions will need to be performed in order to provide mobility management services.

The first category – making the case – begins with advocacy and fund development. These functions serve to strengthen investment and support for mobility management services. The functions in the next category – promotion and awareness – are intended to ensure that individuals are aware of and have access to available services. The last category – day-to-day operations – reflects those functions necessary to maintain a wide variety of transportation options.

Table 4 on the following pages shows the functional assessment matrix applied to two of the region's primary coordinating partners Rideshare, the region's Mobility Manager per the 2007 Coordinated Plan and Ride-On, the region's CTSA. The tables are followed by findings from the assessment. The matrix provides insights into what roles are overlapping and what roles are potentially falling through the cracks.

Table 4: Functional Assessment Matrix as performed for Rideshare and Ride-On by GridWorks.

Category/Function	Rideshare	Ride-On
Making the case		
Advocacy	<u>Strengths</u>: Currently positioned as a strong advocate for alternative transportation in general, direct link to policy makers. <u>Weakness</u>: Limited social services advocacy mission.	<u>Strength</u>: Role as a non-profit creates credibility in social services arena. <u>Weakness</u>: Dual mission relating to both TMA and CTSA services dilutes social service message.
Fund development	<u>Strengths</u>: A good track record of fundraising, experience with multiple federal funding programs. It also is a division of the region's MPO, SLOCOG. <u>Weakness</u>: Opportunistic about funding and new initiatives.	<u>Strength</u>: A good track record of fundraising. Non-profit status allows for alternative fundraising strategies. <u>Weakness</u>: Opportunistic about funding and new initiatives
Promotion and Awareness		
Marketing	<u>Strengths</u>: Skilled in developing high-quality materials, collateral, branding. Regional role allows for ability to market for broad range of services modes.	<u>Strengths</u>: Experience with multiple advertising and promotional channels, willingness to invest in promotion. <u>Weaknesses</u>: Marketing cited as weakness in Future Strategies Report, although shortcomings are being addressed.
Information and referral	<u>Strengths</u>: Website and infrastructure are well established and highly polished. Know How to Go program materials provide strong foundation. <u>Weakness</u>: 511 system is understaffed. Not well equipped to handle large increase in call volumes.	<u>Strength</u>: Answers all calls in person. <u>Weakness</u>: Lack of familiarity by staff with some alternative options for low-income individuals.
Mobility options counseling	<u>Weakness</u>: Function is performed as part of MM position but not enough dedicated staff/time to do so efficiently.	<u>Strength</u>: As a provider Ride-On has flexibility to provide a reduced rate ride for a one-time trip. <u>Weakness</u>: Although this function is performed by Ride-On, it is not promoted or advertised.
Travel training	<u>Weakness</u>: Function is performed as part of MM position but not enough dedicated staff/time to do so effectively.	Not performed

Table 4 Continued: Functional Assessment Matrix as performed for Rideshare and Ride-On by GridWorks.

Category/Function	Rideshare	Ride-On
Day-to-day transportation system operations		
Customer intake, eligibility	<u>Emerging strength</u>: Through partnership with RTA (not performed directly by Rideshare) as result of recent input from 2013 and 2014 Mobility Management workshops.	<u>Strength</u>: Intake processes are designed according to each specific program. Ride-On does not use a formal ADA eligibility process.
Scheduling and Dispatch	Not Performed	<u>Strength</u>: RouteMatch software with rider portal, IVR and real-time dispatch currently in practice. Very large fleet allows for large degree of flexibility. <u>Weakness</u>: High percentage of rides are program related subscription trips. Limited funding for one-off, non-program trips.
Service delivery	Not Performed	<u>Strength</u>: Long history in transportation operations. <u>Weakness</u>: Limited reporting and accountabilities relating to service standards specific to individual services.
Driver screening, training	Not Performed	<u>Strength</u>: Strong driver training program with capacity for others to use. <u>Weakness</u>: Cost of driver training reported by others as too high. In practice, driver training program is only used by two social service transportation providers. Outreach could be more formalized, organized and documented.
Vehicle maintenance, insurance	Not Performed	<u>Strength</u>: Ride-On has robust maintenance and transportation technical assistance resources, is able to provide these services to interested social service agencies. <u>Weakness</u>: In practice, very few agencies use this program. Outreach could be more formalized, organized and documented.
Mileage reimbursement	Not Performed	Not performed

Stakeholder Interviews

In late April and early May 2015, interviews were conducted with representatives from stakeholder organizations to understand the needs and opportunities for coordination of transportation services in the region. The organizations interviewed are as follows (listed alphabetically):

Table 5: Stakeholders interviewed.

Organization	Location	Number of Individuals	Interview Date
Adult Services Policy Council	CAPSLO, 1030 Southwood Drive, San Luis Obispo, CA	14	5/12015
Amdal In Home Care	Over the phone	1	5/5/2015
Community Action Partnership of San Luis Obispo (CAPSLO)	CAPSLO, 1030 Southwood Drive, San Luis Obispo, CA	9	4/30/2015
Regional Rideshare	Regional Rideshare, 1114 Marsh Street, San Luis Obispo, CA	2	5/1/2015
Ride-On Transportation	Ride-On, 3620 Sacramento Drive #201, San Luis Obispo, CA	2	4/30/2015
San Luis Obispo Transit	SLO City Transit, 919 Palm Street, San Luis Obispo, CA	1	4/30/2015
San Luis Obispo Council of Governments (SLOCOG)	Bello Mundo Café, 980 Monterey Street, San Luis Obispo, CA	1	4/29/2015
San Luis Obispo County Department of Social Services	SLO County DSS, 3433 South Higuera Street, San Luis Obispo, CA	1	5/1/2015
San Luis Obispo Regional Transit Authority (RTA)	RTA, 179A Cross Street, San Luis Obispo, CA	1	4/29/2015
SLO Safe Ride	Over the phone	1	4/30/2015
SMOOTH Transportation	Over the phone	1	4/23/2015
Ventura Transit System/Yellow Cabs of San Luis Obispo	SLO County Gov't Center, 1055 Monterey Street, San Luis Obispo, CA	3	4/29/2015
Tri-Counties Regional Center	Tri-Counties Regional Center, 3450 Broad Street, San Luis Obispo, CA	3	4/30/2015

Many of the themes heard during the interviews echoed the findings of the functional assessment. For example, throughout these interviews, a common theme emerged regarding the confusion and competition that resulted from overlapping roles, programs, and offerings. Multiple organizations

including SLO Transit, Rideshare, RTA, and Tri-Counties are performing travel training, but they are not doing so in a coordinated way.

Meanwhile, there is confusion about how some functions are performed and by whom. For example, we heard wildly different interpretations about how the 5310 funding program operates in the county. Lack of clarity and mutual accountability around roles and responsibilities appear to contribute to a lack of trust between stakeholders.

Findings from the Performance Assessment Activities

Taken together, the performance assessment activities provided a handful of key insights into the current status of social service transportation and mobility management in San Luis Obispo County.

Insight: The social service transportation mission is diluted. Ride-On's social service mission as a CTSA is muddled in part because of their ongoing pursuit of other non-social service related transportation programs often referred as a Transportation Management Association (TMA). Several of the recently completed plans and studies identify the same issue. This is also true of Rideshare, where regional mobility management services are geared toward a broader audience. In practice, having vague mission statements has enabled both organizations to serve a wide range of customers. However, it also appears to dilute the social service mission of these organizations, leaving neither as a prominent advocate for social service transportation.

① **Identified Need:** There is a need to clarify the organizational mission of Rideshare and Ride-On as they relate to social services transportation.

Insight: There are gaps and overlap among mobility management functions. Much of the confusion surrounding mobility management and coordination in the region is caused by a lack of clarity in the roles and functions of Ride-On as the CTSA and Rideshare as the regional Mobility Manager. This ambiguity has meant that many key mobility management functions are either overlapping or aren't happening at the level they need to be happening. Formally defining which organization is responsible for which function will provide each partner organization with purpose and accountability.

② **Identified Need:** There is a need to better define the roles of the CTSA and other parties performing mobility management functions.

Insight: Travel training and travel options counseling programs could be stronger. Both agencies provide a degree of information and referral services but neither is distinguished as the go-to resource. Rideshare provides broad transportation information services including 511 and the "Know How to Go!" program, which includes travel training and formal mobility options counseling. Ride-On provides informal mobility options counseling when a caller is not eligible for any of Ride-On's existing services. This can include a one-time reduced rate for riders who are in need. Based on the level of interest in individualized trip planning from social service agencies expressed in prior plans and at the Mobility Management workshops, there is demand for additional travel training services. If more directed effort was made to meet the need for individualized travel information, it would increase ridership on fixed-route transportation and potentially decrease the demand for ADA paratransit.

(3) **Identified Need:** There is a need for more travel training and travel options counseling.

Insight: The region has a wide range of transportation resources. With many of the mobility management functions being provided by numerous organizations throughout the community, there is great opportunity to coordinate. Partnerships with these organizations will create stronger programs that are able to reach more community members. Some examples of this include:

- **Sharing trips.** Many taxi vehicles and TNCs experience low volumes during the daytime on weekdays, the same general time period when Ride-On and Runabout experience peak ridership. With proper coordination and training, these vehicles and drivers could help meet the demand for human service transportation during weekdays.

- **Providing NEMT service.** Yellow Cab of San Luis Obispo, owned by Ventura Transit System, has had experience providing NEMT services in Ventura and Los Angeles Counties. In 2015, they entered into a contract with Easy Lift in Santa Barbara, under which they pickup MediCal rides, when the CTSA/ADA agency lacks capacity. They already serve MediCal clients across the San Luis Obispo/Santa Barbara County line and could potentially use that experience to help meet the need by expanding their presence to serve more local NEMT requests in San Luis Obispo County.

- **Expanding the volunteer driver pool.** Many human service organizations stated that their staff members sometimes provide needed rides for their clients, despite not having any formal training as a paid or volunteer driver. Meanwhile, there are transportation programs that rely on volunteer drivers, but their services are not centrally coordinated or always made available to human service organizations in the area. While the existing Wilshire Foundation Good Neighbor volunteer driver program fills a critical niche, recruitment of volunteers has been limited and the service remains relatively expensive on a cost per ride basis. Putting investment and support behind a coordinated volunteer driver program such as this could help ensure that users get transportation that is appropriate for their needs.

Insight: Coordinated intake, referral and eligibility screenings should be explored. Based on input during the 2014 Summit there is a great deal of support for clarifying how referrals are made between Rideshare, Ride-On, and Runabout. RTA's intake process for Runabout is not currently coordinated with other organizations' services. Coordinating multiple intake processes between public and private providers would likely mean a more efficient use of resources and less confusion from end-users.

Insight: Coordinating driver recruitment, training, and certification could increase the region's capacity. Multiple stakeholders expressed that despite there being plenty of demand for human service transportation and non-emergency medical transportation services, the bottleneck may be finding enough qualified and interested drivers either for paid or volunteer positions. Coordinating efforts would mean a less confusing process for potential drivers as well as a more efficient process that can afford to focus more efforts on recruitment.

Insight: Coordinated marketing could help to increase awareness of existing programs. Multiple plans indicate a need for Ride-On and other providers to invest in marketing. Rideshare's "Know How to Go!" program is a good place to start.

(4) **Identified Need:** There is a need to explore greater coordination of available transportation services and key mobility management functions between Ride-On, Rideshare, and other coordinating partners.

Community Outreach Activities

Building on the stakeholder interviews conducted in April and May of 2015, the consultants organized additional community outreach activities to see how the findings from the performance assessment activities compared to the perceptions and experiences of residents across San Luis Obispo County. In early August 2015, the consultants conducted intercept surveys and personal interviews in various cities and towns across the county, including San Luis Obispo, Morro Bay, Los Osos, Grover Beach, Nipomo, and Paso Robles. One primary goal was to hear from residents who rely on transportation services, particularly those in some of the further flung corners of the county where transportation is most limited.

- **Intercept Surveys.** Since the community members most affected by changes in public transportation are the people who don't have the option to drive, the intercept surveys were targeted at low-income populations, people with disabilities, and seniors. From August 6-11, 2015, we spoke with 88 Spanish and English speaking individuals at free meal events, homeless shelters, community health screenings, bus stops, parks, and public libraries. The survey is included in Appendix D along with a summary of responses.

- **Community Interviews.** To help solicit more detailed feedback from the community beyond the questions asked in the intercept surveys, we scheduled more in-depth interviews with three community members. These residents all provided unique perspectives regarding the transportation options available in San Luis Obispo County. Interview summaries are included in Appendix D.

Findings from the Community Outreach Activities

The community outreach activities provided a number of additional insights, some of which corroborated the findings from the performance assessment activities. These insights helped illuminate additional needs for this plan to address, as detailed below.

Insight: Few residents know about informational resources. One of the most interesting takeaways from the survey was the number of participants who had never heard of the key transportation information resources: 511 and "Know How to Go!" (Figure 8). Many places providing key services in the community – including senior centers, homeless shelters, and transit stops – did not have any of the pamphlets or handouts from these programs on display. In addition, many survey participants did not own a phone, thus limiting their ability to call 511. Delivering informational materials to centers around the community would be an easy way to inform these and other residents about lesser-known transportation options such as senior shuttles and local volunteer driver programs.

Figure 8: Intercept survey participant's familiarity with informational resources.
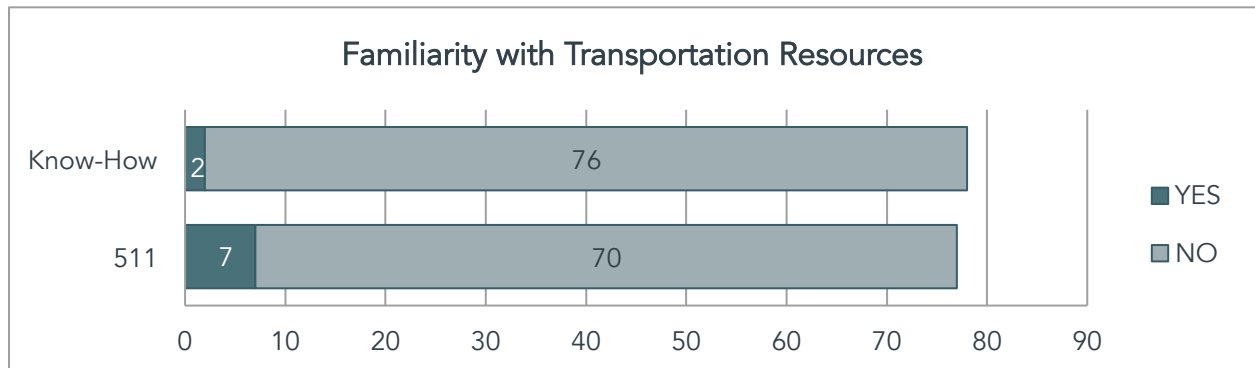
(5) **Identified Need:** There is a need for new strategies for marketing existing transportation services.

Insight: Buses are too infrequent. As buses only come once every half hour or once every hour (less on weekends), many people have difficulties making transfers and getting to places like work and school in a timely fashion. For example, some participants in San Luis Obispo mentioned that walking or biking are often faster ways for them to get around the city. While this provides great exercise for some of the county's residents, it is a possible barrier to many seniors, low-income residents, and people with disabilities.

Survey participants were also asked for general feedback on currently available public transportation options. While there were many positive responses, Figure 9 outlines the five most common suggestions survey participants had for improving public transportation services.

Figure 9: Top five suggestions for improving public transportation services.
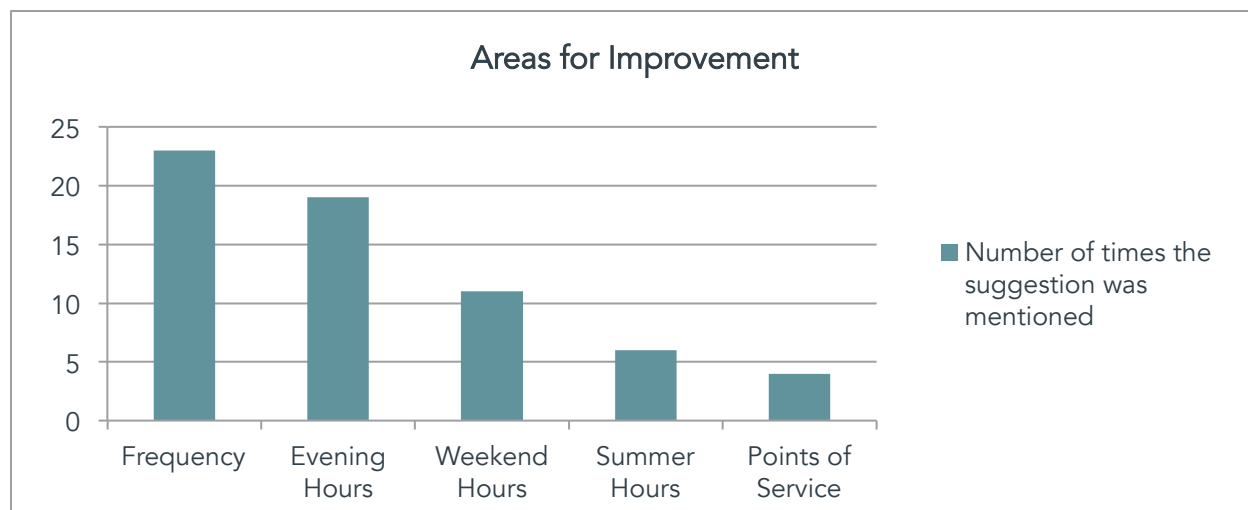
The issue of frequency is exacerbated on evenings, weekends, and in San Luis Obispo during the summer. Many of the people that rely on public transit most are unable to take jobs that start or end in the evening because they don't have transport to get there and back. A group of senior citizens mentioned a similar problem with taking classes. Since many adult education classes are in the evenings, they have no reliable way of getting home afterwards. In addition to causing people to have longer wait times for buses, infrequency can cause a lot of confusion for people trying to figure out the system for the first time. One survey participant even mentioned being left at a bus stop more than a mile from her house because she didn't realize that routes as well as times change during the summer.

(6) **Identified Need:** There is a need for increased frequency and span of transportation services such that options are available more often and on nights and weekends in key areas.

Insight: There are geographic gaps in service. In regions of the county where fixed-route transit is lacking, not having a car can mean not being able to get a job, or have access to healthy food and medical care. SLO City routes are largely oriented to get riders in and out of downtown and to the university, making certain cross-town trips especially long. The following areas were identified by stakeholders and the public as regions with the most limited or inadequate transportation service:

- **South County.** The Nipomo area in particular was cited by a number of stakeholders as an area that is not well served by public transportation.

- **North County.** Downtown Templeton used to have a bus but today the area is served only by RTA route 9, which stops on the other side of HWY 101.

- **Shandon.** This relatively low-income area out on HWY 46 to the East has dial-a-ride service 3 times per week on call.

- **Oceano.** This unincorporated territory just South of Grover Beach has a relatively high concentration of native Spanish speakers who travel to Santa Maria for goods and services, a bus trip that despite being only 16 miles long takes between 1.5-2 hours each way.

- **Morro Bay.** This coastal city features a number of low-income mobile home parks and senior living centers, as well as full-time vacation rental homes. This population dichotomy presents a unique challenge for transportation as these two populations have very different needs. Some of the low income mobile home parks are outside the ¾ mile definition for access to the local fixed route deviation service.

- **San Luis Obispo Airport and Greyhound Station.** All survey participants that mentioned points of service in San Luis Obispo cited the Greyhound stop and the airport as the most difficult places to go. The fact that there isn't an economical way for people to get to these key travel locations means that low-income and disabled residents have greater difficulty coordinating with visiting family and friends as well as accessing the increasing number of services in these areas.

(7) **Identified Need:** There is a need to increase transportation service to connect rural areas with services in San Luis Obispo and Santa Maria.

Insight: There is a lack of resources available for low-income populations. While we spoke with many of San Luis Obispo's disadvantaged populations as part of this survey, people with low-incomes generally had the lowest number of transportation resources available to them. They lack the ability to get to jobs and necessary services because many live in homeless camps far from the city center and can't afford the bus fare. While there are a number of organizations and programs that provide funding and transportation to seniors and people with disabilities, many people with low-incomes still have limited options.

Populations of low income are varied with diverse transportation needs. A few examples of the needs of different populations of low income include:

- **Hospitality industry workers.** These individuals have seasonal and weekend peaks that are often at odds with typical weekday demand. They often travel long distances from home to coastal areas or out into wine country.

- **Agricultural Industry workers.** These individuals tend to have variable destinations. They also often need to travel long distances from home to rural areas with very limited transportation options. Workdays start early, even on weekends, and they often have language barriers to overcome.

- **Homeless individuals.** These individuals often need access to destinations and social services that are spread out all over the county. Shelters, treatment facilities, or even an opportunity for a hot meal are often too far away to access with out transportation and money to pay the fare.

- **Seniors.** Seniors tend to have more regular schedules, but sometimes need more attention and care. These individuals also have a higher proportion of disabilities that impact their ability to get around independently.

- **Youth.** These individuals need consistent and reliable transportation to school and after school activities, as well as shopping or work trips at irregular times.

It is important to recognize that these are not distinct groups, and that there is a great deal of overlap between different populations of low income.

(8)   **Identified Need:** There is a need to increase transportation options for low-income populations.

In the next chapter we will present potential strategies and actions that can meet the desired outcomes of this plan. The needs identified above will be used as a tool to prioritize the strategies and actions of this plan.

CHAPTER 4: PRIORITIZATION CRITERIA & POTENTIAL STRATEGIES

In this chapter we combine the needs identified in Chapter 3 with the desired outcomes presented by the stakeholder advisory group at the April 2015 stakeholder kickoff meeting. We then distill this information down to a set of three priority outcomes to frame the recommendations of the Coordinated Human Services Public Transportation Plan.

Translating Needs into Prioritized Desired Outcomes

Chapter 3 identifies unmet needs drawing from an extensive analysis of current services, prior plans and activities, stakeholder feedback, and community outreach. The eight identified needs are summarized in Table 6 below.

Table 6: Summary of identified needs from the analysis.

1	**Identified Need:** There is a need to clarify the organizational mission of Rideshare and Ride-On as they relate to social service transportation.
2	**Identified Need:** There is a need to better define the roles of the CTSA and Regional Mobility Manager.
3	**Identified Need:** There is a need for more travel training and travel options counseling.
4	**Identified Need:** There is a need to explore greater coordination of key mobility management functions between Ride-On, Rideshare, and other coordinating partners.
5	**Identified Need:** There is a need for new strategies for marketing existing transportation services.
6	**Identified Need:** There is a need for increased span of transportation services such that more options are available on nights and weekends in key areas.
7	**Identified Need:** There is a need to increase transportation service to connect rural areas with services in San Luis Obispo and Santa Maria.
8	**Identified Need:** There is a need to increase transportation options for low-income populations.

Many of these needs (specifically 1, 2 and 4) relate to coordination and communication among existing partners. As part of this project we explored several potential changes to the roles and responsibilities of key partners. We considered shifting more responsibility for travel training and mobility options counseling to the CTSA as a means of delineating roles and raising the profile of

the social service transportation mission of the CTSA. We also explored the concept of using a Memorandum of Understanding (MOU) to clarify and strengthen roles and accountabilities. These ideas were presented at the Third Annual Mobility Management Workshop in San Luis Obispo on October 6, 2015.

Other needs (specifically 3 and 5) relate to marketing of existing services and delivery of travel training services. While some of these needs could potentially be met through improvements in the roles and responsibilities of key partners, participants of the October 6 workshop also expressed concerns relating to lack of trust and potential unfair competition; specifically they viewed this as challenging if the CTSA were to play a larger role in travel training and mobility options counseling.

The remaining three needs (6, 7 and 8) relate to low-income populations and fixed-route transit services for which the 5310 program is not a readily available source of funding. These needs could potentially be met by strategically leveraging the 5310 funds so that more the flexible dollars – such as state monies (STA and LTF), federal monies (5307 and 5311) are available to expand fixed-route services. This way the 5310 funds can be used to indirectly benefit low-income individuals who would otherwise not benefit from 5310 funds.

In order to integrate these eight identified needs with the ongoing planning process we can translate them into corresponding desired outcomes (Table 7). This allows us to align the needs identified through the analysis and outreach phase with the desired outcomes previously identified by stakeholders earlier in the planning process.

Table 7: Identified needs can be translated into a corresponding desired outcome.

	NEED		DESIRED OUTCOME
1	Clarify the social-service transportation mission of Rideshare and Ride-On.	→	Rideshare and Ride-On have clarity on their respective social-service transportation missions.
2	Defined the roles for the CTSA and Regional Mobility Manager.	→	Roles for CTSA and Regional Mobility Manager are clearly defined.
3	Increase available travel training and travel options counseling.	→	Travel training and travel options counseling services are plentiful and readily available for those in need.
4	Better coordination of key Mobility Management functions.	→	Mobility Management functions are effectively coordinated across the county.
5	New strategies for marketing existing transportation services.	→	Users and the general public are aware of existing transportation services.
6	Increased frequency/span of transportation services on nights and weekends.	→	More transportation is available on nights and weekends.
7	Increase service to connect rural areas with services.	→	People in rural and low-density areas have more transportation options available.
8	Increase transportation for low-income populations.	→	People with low-incomes have more transportation options available to them.

The newly identified outcomes can then be combined with the desired outcomes collected at the stakeholder kickoff meeting in April 2015 creating a comprehensive list of outcomes that should be considered for this planning process. The comprehensive list of outcomes is shown in Table 8 on the following page.

Table 8: Combined list of desired outcomes.

SHORT TERM	MID TERM	LONG TERM
• More accessible vehicles available • More same day trips available to be booked • Available options are more affordable • Available options have a wider service span (nights/weekends) • Residents and visitors are more aware of existing options • There are more ways to book trips • Booking trips over the phone is quick and easy (fewer call transfers) • Transportation providers can swap trips with each other when needed • Roles for CTSA and Regional Mobility Manager are clearly defined • Users and the general public are aware of existing transportation services	• Resources are aligned and utilized more efficiently • All riders - especially seniors and people with disabilities - feel independent and confident riding transit • Transportation providers are collaborative partners • Transportation providers are accountable to each other and their own roles • Private sector partners have the information needed to participate fully • Partners have clarity on their respective social service transportation missions • More transportation is available on nights and weekends • Travel training and travel options counseling services are plentiful and readily available for those in need	• Increase cost effectiveness so that savings can be reinvested into the transportation system • Overall spending on ADA paratransit is reduced • Travel times are reduced • Seniors can age in place • Available options are convenient • Available options are plentiful • People in rural and low-density areas have more transportation options available • People with low-incomes have more transportation options available to them • Mobility Management functions are effectively coordinated across the county (Newly identified outcome)

In its current state, the above list of outcomes is too large and unruly to be of much use in guiding the Coordinated Plan. Many of the outcomes overlap and the distinctions between short-term, mid-term, and long-term outcomes are vague. Additionally, some outcomes such as reduced travel times for fixed-route transit are outside of the scope of what can be accomplished within the coordinated planning process.

Instead of attempting to craft a plan with steps to address each and every outcome, we can focus on overarching priority outcomes that encompass the items listed above.

- **Priority Outcome #1: Improve communication and coordination among local agencies involved in all levels of coordinating social service and public transportation programs.** This first priority outcome encapsulates many of the items on the list, including missions, roles, and communication. It also specifically responds to the needs for better communication and coordination among partners, which was continually identified by stakeholders as a major priority throughout the process.

- **Priority Outcome #2: Increase independence among seniors and people with disabilities.** The second priority outcome collects needs expressed by stakeholders and the community for services that enable seniors and people with disabilities to live independently by making the

county more accessible through increased transportation options. Successfully achieving this outcome will mean meeting many other benchmarks along the way, including more convenient transportation options and increased access to fixed-route services through travel training and mobility options counseling. Additionally, this priority outcome indirectly addresses the desire to reduce overall demand for ADA paratransit service, by making other, less expensive alternatives more attractive and accessible.

- **Priority Outcome #3: Increase transportation options for low-income families and workers.** The third priority outcome speaks directly to the needs identified for better transportation for the County's economically disadvantaged individuals, families, and communities. From low-density areas like Nipomo to the city of San Luis Obispo, we heard from stakeholders and the public that many of the region's transportation services were either not affordable or not available at the times and locations that low-income individuals needed them. This priority outcome collects the needs and desires expressed for affordability, flexibility, and service span.

In chapter 5 we will explore these three priority outcomes and present recommended actions for stakeholders in San Luis Obispo County that result in these outcomes being achieved.

CHAPTER 5: RECOMMENDATIONS

This chapter presents the recommended actions of the Coordinated Plan. Actions are aligned with one of the three priority outcomes identified in Chapter 4. Accordingly, recommendations are presented within the outcomes (or goals) that stakeholders seek to accomplish with this Coordinated Plan.

- Each of the three (3) priority outcomes is presented below with 1-2 corresponding priority actions.

- Each action includes a conceptual cost estimate, as well as measures and targets specific to the project.

- Each action includes a description with background for why the action is recommended as a priority and details for how it can be carried out.

Table 9: Summary of Recommendations

Priority Outcome #1: Improve communication and coordination among local agencies involved in all levels of coordinating social service and public transportation programs.	
Action 1.1	SLOCOG to establish an MOU with Ride-On covering CTSA expectations.
Action 1.2	Transition Regional Mobility Management Functions toward Support of SSTAC & 5310 Programming.
Priority Outcome #2: Increase independence among seniors and people with disabilities.	
Action 2.1	SLOCOG to consolidate travel-training functions and seek professional services through an RFP to provide regionalized travel training.
Priority Outcome #3: Increase transportation options for low-income families and workers.	
Action 3.1	Ride-On to expand supports for community-based transportation services.
Action 3.2	SLOCOG to work with Caltrans to coordinate 5310 grant program to fund and implement other innovative projects.

Priority Outcome #1: Improve communication and coordination among local agencies involved in all levels of coordinating social service and public transportation programs.

As part of this project we explored several potential changes to the roles and responsibilities of key partners. Much of the confusion surrounding mobility management and coordination in the region is caused by the lack of clarity in the roles and functions; those include respectively Ride-On Transportation as the CTSA and SLO Regional Rideshare as the regional Mobility Manager. In order to clarify roles and responsibilities we explored the idea of shifting more responsibility for travel training and mobility options counseling to the CTSA. The intent was to further delineate roles and to raise the profile of the social service transportation mission of the CTSA. We also explored the concept of using an MOU to clarify and strengthen roles and accountabilities of the CTSA. These ideas were presented at the Third Annual Mobility Management Workshop in San Luis Obispo on October 6, 2015.

Participants in the October 6 workshop expressed concerns relating to lack of trust and potential unfair competition among transportation providers if the CTSA were to play a larger role in travel training and mobility options counseling. Based on the feedback received, we no longer recommend shifting travel training or mobility options counseling functions to the CTSA. Instead, we recommend issuing a third-party RFP, as described under Action 2.1.

We also recommend creation of an MOU between Ride-On and SLOCOG to delineate the roles and expectations of the CTSA. Furthermore, we recommend refocusing Regional Mobility Manager staff time provided by SLOCOG on enhanced support for Social Services Transportation Advisory Committee (SSTAC) to assist in implementing this plan. These actions are described in detail on the following pages.

Action 1.1   SLOCOG to establish an MOU with Ride-On covering CTSA expectations.

Cost	• Establishing the MOU will be carried out as part of this coordinated plan update. The cost is less than $10,000 and will be paid for using current funds. The cost of maintaining the MOU involves staff time from SLOCOG.
Performance Measures	• Creation of and regular amendments to the MOU.
Performance Targets	• Create and adopt the MOU within 3 months of the adoption of this plan. Revise MOU at least once per year as experience is gained.

As we discussed earlier in the plan, CTSAs have a great deal of flexibility in how they operate, which has resulted in a wide range of operating models among California's CTSAs. The Social Service Transportation Improvement Act identifies specific activities that a CTSA should perform but does not provide guidelines for accountability. A recent analysis by CalACT, California's specialized transportation association found that only 15 of the state's 50 designated CTSAs conform to the original legislative intent expressed in AB 120.

The CTSA legislation does not go far enough in establishing clear reporting and accountability requirements for CTSAs. We recommend SLOCOG and Ride-On develop an MOU covering the following topics to ensure agreement, transparency, and accountability surrounding CTSA functions and expectations:

•   The MOU should delineate the specific functions performed by the CTSA in exchange for LTF funding and its designation as the CTSA, including existing LTF funded activities and new CTSA support functions identified below.

•   The MOU should define which are the thresholds for a CTSA function to warrant supplemental STA funding, once agreement has been reached on all identified LTF functions.

•   The MOU should establish a CTSA Advisory Board. For simplicity, we recommend the existing SSTAC serve this function.

•   The MOU should designate specific performance targets and reporting requirements for each function provided by the CTSA. Reporting requirements should include explicit financial reports of how LTF funds are used.

Action 1.2	Transition regional mobility management functions toward support for SSTAC and 5310 programming.

Cost	• The cost for this action should be based on approximately .5 FTE.
Performance Measures	• Commitment from SSTAC members to support the implementation and evaluation of the other actions of this plan. • Successful implementation and evaluation of strategies in this plan.
Performance Targets	• The majority of SSTAC members can recite the strategies of this plan and the roles of key players one year after this plan is adopted. • Four out of five actions from this plan have been successfully implemented within three years of plan adoption. All actions are evaluated for impact according to the performance measures identified herein and with respect to criteria included in the grant applications used to fund the actions.

The 2007 Coordinated Plan includes three overarching goals, 15 objectives and 53 implementing actions. During an earlier step in this planning process each of the implementing actions was reviewed to determine status and impact. Each implementing action was rated as "Implemented," "Partially Implemented," or "Not Implemented." Table 10 below summarizes the findings of this evaluation.

Table 10: Status of "Implementing Actions" as a Percentage of all Actions by Goal

	Implemented	Partially Implemented	Not Implemented
Goal 1.0 – Coordination Infrastructure	29%	29%	42%
Goal 2.0 – Build Capacity to Meet Needs	4%	29%	67%
Goal 3.0 – Information Portals	25%	50%	25%

As shown in Table 10, the majority of actions were either "Partially Implemented" or "Not Implemented" at all. In addition to the effects of the economic recession, we attribute the limited success of the prior plan to several other factors, including unclear roles and responsibilities, limited follow-through on evaluation, lack of clarity and overly complex actions, and a need for leadership in administering implementation of the plan. These factors are explored in detail in the performance evaluation section of Appendix C.

In order to improve performance we recommend the regional Mobility Management functions shift away from providing travel training and focus more specifically on support of SSTAC and "shepherding" of the 5310 program.

Specifically, we recommend SLOCOG and Regional Rideshare, dedicate a larger share of time for the following functions:

• **Overseeing the CTSA MOU.** Staff time is needed to review performance reports and follow up on MOU compliance issues as necessary.

- **Overseeing the Travel Training RFP.** Staff time is needed to interface with the travel training contractor to set expectations, and to ensure performance in compliance with the RFP.

- **Local shepherding of the 5310 program.** Staff time is needed to oversee implementation of the strategies in this plan, including the enhanced role SLOCOG will need to play as part of Action 3.2.

- **Staffing the SSTAC.** SSTAC's enhanced role in overseeing the CTSA will also require additional staff time.

Priority Outcome #2: Increase independence among seniors and people with disabilities.

Essentially every transportation plan and needs assessment that has been carried out for the San Luis Obispo region in the past five years has identified a need for improved transportation information. Many of these plans point specifically to the need for individualized transportation information. While the region has made progress in travel training in some ways, the depth of travel training available has been inadequate to reach individuals with disabilities and seniors who remain dependent on other modes of transportation such as ADA paratransit or family members.

We recommend an increase in funding for travel training and mobility options counseling functions and that these functions be consolidated under a single countywide program. Furthermore, we recommend the regional partners work together to procure these services from a professional third-party through an RFP. In order to keep the focus of travel training on independence and not cost-savings, the travel training function should be separate from the ADA eligibility determination process.

Action 2.1	SLOCOG to consolidate transit travel training functions and seek professional services through RFP to provide regional travel training.

Cost	• The travel training contract will likely range between $90,000 - $200,000. • Development of referral criteria as part of developing a no-wrong door approach to mobility options counseling will require staff time from multiple organizations.
Performance Measures	• Number of individuals successfully trained per year. • Increase public awareness of 511 and the Know-How-To-Go guide.
Performance Targets	• 40 individuals successfully travel trained per year. • Greater than 50 percent of all contacts through intercept survey or a household survey have heard of 511 or Know-How-To-Go guide. • Identified herein and with respect to criteria included in the grant applications used to fund the actions.

We recommend SLOCOG/Rideshare work with transportation providers, primarily SLO RTA and SLO Transit, to develop an RFP solicitation for Travel Training. The aim of the travel-training program should focus on maximizing independent travelers among seniors and people with disabilities.

Travel training should go beyond travel orientation to include working with individuals to the gain skills and abilities necessary to travel independently. As part of the RFP, we recommend increasing

the total amount of funding for travel training to ensure that at least one FTE is available to provide travel-training services in the region.

The cost estimate of $90,000 - $200,000 is based on an allowance of $65,000 for direct labor per FTE for 1 to 2 FTEs plus a direct cost budget of $10,000 per FTE for equipment, marketing, transit fares, and training. The low-end estimate assumes one FTE plus an administrative overhead rate of 20 percent. The high end rate assumes two FTEs and an administrative overhead rate of 35 percent. Overhead includes allocated rent, utilities, communications, insurance, administrative oversight and professional services.

It is important that travel training be carried out following best practices by a trained and experienced professional. The individual or individuals filling the travel training roles should receive adequate training and certification by third-party experts. For travel training we recommend Easter Seals or the Association for Travel Instruction.

Last, it is also important that the purpose of travel training focus on increasing independence of seniors and people with disabilities. Caregivers tend to distrust travel training programs that are designed primarily as a means of lowering the cost and demand of ADA paratransit programs. This is why we have separated travel training from the actions listed under Priority Outcome #3. This is also why we recommend travel training be carried out separately from ADA eligibility determination process. While some transit agencies have successfully implemented travel training programs, we recommend the regional partners consider a third-party that is separate from the local transit providers to further delineate the purpose of travel training as one that is separate from ADA cost-savings.

As part of the RFP we recommend Rideshare include a task directing the travel training provider to collaborate with Rideshare and other key stakeholders including the CTSA, to incorporate the Know-How-To-Go guide into the travel training curriculum. This task should include developing a no-wrong door approach for providing mobility options counseling.

Recognizing that individuals tend to seek transportation information from a variety of sources, which can include 511 as well as local social service and transportation providers, we recommend a no-wrong-door approach to providing transportation information. The Know-How-To-Go guide should continue to be maintained by SLOCOG as the central repository of transportation information for all agencies who receive inquiries about transportation.

In order to integrate the Know-How-To-Go guide into the travel training and the no-wrong-door approach to mobility options counseling criteria for referrals will need to be established.

- **Referral Criteria.** Criteria will need to be developed jointly by Rideshare, the travel trainer, and transportation providers to determine when a referral is needed from 511 to the travel trainer for travel training or a provider for specific transportation services.

- **Warm Referral Procedures.** A warm-referral procedure involves key agencies using an attended call transfer function to transfer callers to other agencies when the initial call goes to the wrong agency. For example, if a consumer calls agency A only to learn that Agency B is a better fit, the call taker at Agency A can transfer the caller to Agency B without hanging up. The result is the caller need not call multiple numbers in order to find the right ride. This is helpful when coupled with an up-to-date centralized information resource such as the Know-How-To-Go guide so that agencies know where to refer callers.

Priority Outcome #3: Increase transportation options for low-income families and workers.

Many of the needs identified in this plan relate to the needs of low-income families and individuals who find it difficult to navigate the local transportation system. While the 5310 program is not an ideal funding source for meeting the needs of these groups, the 5310 program can be leveraged to offset the expense of the ADA paratransit program so that more of the flexible dollars available in the region – such as State Transportation Assistance (STA), Local Transportation Fund (LTF), and FTA section 5307 and 5311 funds – are available to expand fixed-route services. This way the 5310 funds can be used to indirectly benefit low-income individuals who would otherwise not benefit from 5310 funds.

This strategic leveraging can be accomplished by investing 5310 funds in a range of actions that create high-quality, low-cost alternatives to ADA paratransit. As shown in Table 11 below ADA paratransit demand is growing substantially faster than the average growth in population[12, 13, 14]. If this trend continues at an average growth rate of 10 percent per year for the next three years, ADA paratransit costs will increase by nearly $1 million to $3.8 million in 2017. Strategic investments in high-quality alternatives to the ADA paratransit program that reduce growth in ADA demand will result in substantial cost savings that can be reinvested into the general public transportation system. This has the benefit of increasing transportation options for low-income families and individuals while also improving transportation options for seniors and people with disabilities.

Table 11: Runabout Ridership Growth Relative to Population Growth

FY	Runabout Ridership	Annual % Change	Population	Annual % Change
09/10	31,554	4.6%	266,971	0.7%
10/11	32,929	4.4%	270,005	1.1%
11/12	34,424	4.5%	271,253	0.5%
12/13	37,994	10.4%	274,622	1.2%
13/14	43,669	14.9%	276,443	0.7%

In order to accomplish this, we recommend a two-pronged approach involving both the CTSA and SLOCOG in specific roles well-suited to their respective areas of expertise. The first prong involves expansion of supports for community-based transportation providers to be provided by the CTSA. The second prong involves SLOCOG playing a larger role in "shepherding" the 5310 process to invest in strategic small-scale projects with clearly defined objectives tied to the outcomes identified in this plan. This two-pronged approach is further described in Actions 3.1 and 3.2, below.

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[12] Runabout ridership data from years 09/10 - 11/12 is from SLO RTA March 6, 2013 Staff Report Agenda Item A-2.

[13] Runabout ridership data from years 12/13 and 12/14 is from RTA and SLO Transit Join Short-Range Transit Plan.

[14] SLO County population estimates data from U.S. Census Bureau.

Action 3.1	Ride-On to expand supports for community-based transportation services.

Cost	• The equivalent of approximately 1 FTE.
Performance Measures	• Average cost per ride, percent increase in rides provided by volunteers and customer satisfaction measured through an annual survey with a statistically valid random sample of riders.
Performance Targets	• Maintain an average cost per ride less than $25. • Increase ridership by at least 20 percent per year. • Maintain greater than 95% customer satisfaction rating on annual customer satisfaction survey.

The original social service transportation act allows CTSAs to achieve cost efficiencies through consolidation, coordination, or a mixture of both. Based on input gained during our interviews, we found that many of the transportation programs that can be consolidated, have already been folded into Ride-On's portfolio. At this point, the remaining transportation providers appear to be more effective as autonomous entities whose programs would not benefit from consolidation. As a mature CTSA, Ride-On could provide support for smaller transportation providers and volunteer driver programs by expanding the availability of supportive services such as driver training, and vehicle procurement and maintenance. In fact, half of the agencies that completed the transportation survey for this Coordinated Plan Update identified an interest in joint driver training. Of these, the majority expressed similar training requirements.

This strategy should include but is not limited to enhanced support for volunteer driver programs. The goal is to strengthen and support community-based transportation services. This would be accomplished by increasing operating funding for Ride-On to increase availability of support in the following areas.

•   Driver Training

•   Vehicle Maintenance

•   Vehicle Sharing

It is important to allow flexibility in how these supports are structured so they can be tailored to the individual agencies supported by Ride-On. As such, monitoring and evaluation of these supports should focus on the results rather than the outputs. The important results include an increase in the number of rides provided by supported providers while maintaining a relatively low cost per ride and high customer satisfaction.

Action 3.2	SLOCOG to work with Caltrans to coordinate the 5310 grant program to fund and implement other innovative projects.

Cost	• 100 percent of the remaining 5310 and LTF funds should be made available after funding of other actions identified in the plan.
Performance Measures	• Number of projects implemented.
Performance Targets	• Implementation of two other projects identified in the logic model within two years of this plan's adoption.

One of the key insights gained from this planning process relates to the substantial changes that have occurred since the last plan was completed. Chapter 1 highlights a number of dramatic changes in the economy, in technology and in policy that will continue to shape how human service transportation programs are provided. In order to address this uncertainty we recommend prioritization be structured in a way that allows a degree of flexibility in determining how local projects are funded. This flexibility is accomplished by identifying a percentage of available 5310 and LTF funds to distributed on a discretionary basis. Prioritization will be accomplished as part of the grant review process by requiring applicants to demonstrate how their projects meet the outcomes and needs identified in this plan.

We recommend the remaining 5310 and LTF funds be available for any of the eligible activities under the 5310 program and prioritized by the SSTAC. Initially we recommend small-scale investments in multiple types of programs that create low-cost, high-quality alternatives to ADA paratransit. Higher-cost projects that are more complex should be funded only after lower-cost strategies have successfully been implemented. Recommended prioritization criteria include:

• The grant applicant demonstrates a logical connection to one of the three desired outcomes identified in this plan.

• The application helps the region meet specific needs identified in the needs assessment of the plan.

• Cost relative to other applications.

• Ease of implementation relative to other applications.

For the first two items grant applications could include a questionnaire similar to Figure 10 below.

Figure 10: Supplemental Questionnaire for Funding Applications.

OUTCOMES AND NEEDS OF THE COORDINATED HUMAN SERVICES PUBLIC TRANSPORTATION PLAN	
Which of the priority outcomes of the 2015 Coordinated Human Services Public Transportation Plan does your project help achieve? (check all that apply): ☑ Improve communication and coordination among local agencies involved in all levels of coordinating social service and public transportation programs. ☑ Increase independence among seniors and people with disabilities ☑ Increase transportation options for low-income populations, particularly families and workers	Which additional needs identified in the Coordinated Human Services Public Transportation Plan does your project help to meet? (check all that apply): ☑ Increase available travel training and travel options counseling ☑ Coordinate Mobility Management functions ☑ New strategies for marketing transportation services ☑ Increase span of services on nights and weekends ☑ Improve service to and from rural areas
Please describe how your project helps achieve these outcomes: _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____	Please describe how your project helps to meet these needs: _____ _____ _____ _____ _____ _____ _____ _____ _____ _____ _____

Updated Logic Model

Table 12 shows the updated logic model that encapsulates the Coordinated Plan. The three priority outcomes are listed on the far right. The recommended actions are reflected in the Activities column. The Inputs are the resources needed to implement the activities, and the Outputs are the measures and targets for each activity that will ensure that the priority outcomes are being met.

If 5310/LTF funding is leveraged as described above, other resources should be freed up for supplementary improvements for fixed-route. Table 13 deals with these areas that are outside of the scope of the Coordinated Plan but are highly related.

Table 12: Complete logic model for the Coordinated Plan.

INPUTS (Resources)	ACTIVITIES (Actions & Strategies)	OUTPUTS (Measures & Targets)	PRIORITY OUTCOMES
• Current JARC funding ($10,000) • 0.5 FTE	• MOU between CTSA & MPO • Shift Mobility Management to SSTAC support & 5310 program	• Execute and update MOU • SSTAC familiarity with coordinated plan goals	#1. Improve communication and coordination around social service and transportation.
• 5310 & LTF ($100-$250k)	• Consolidate travel-training	• Release RFP for regional travel training function	#2. Increase independence for seniors and people with disabilities.
• 1 FTE • Remaining 5310 & LTF funding	• Expand support for community-based transportation • Increase 5310 projects	• Maintain < $25 average cost/ride • Increase ridership • Maintain customer satisfaction • Projects implemented	#3. Increase transportation options for low-income families and workers.

Table 13: Complete logic model for actions related to low-income needs outside of the Coordinated Plan.

INPUTS (Resources)	ACTIVITIES (Actions & Strategies)	OUTPUTS (Measures & Targets)	PRIORITY OUTCOMES
• **5307 Funding** • **5311 Funding** • **STF and other Funding**	• Expand fixed route services, hours, and coverage • Implement user-side subsidies for taxis and TNCs	• Increased ridership on fixed-route • Increased hours and miles on fixed-route • Increased ridership on taxi and TNCs	#3. Increase transportation options for low-income families and workers.