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Regional Travel Concierge Initiative:

Phase I Planning

Final Report

February 2007

**Henry H. Kessler Foundation
Employment Grant Program
Report Cover Sheet**

Date: February 2007

Name of organization completing report: Alan M. Voorhees Transportation Center
Rutgers, The State University of New Jersey

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Contact person and title (if not Executive Director): N/A

Project name or brief project description: To conduct Phase I planning activities related to creating a *Regional Travel Concierge* demonstration project for New Jersey designed to address transportation barriers to work for people with disabilities.

Check one: ___ General operating Project support ___ Other: (please specify)

Dates covered by this report: from October 1, 2005 to January 31, 2007

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Introduction

Background

In October 2005, the Alan M. Voorhees Transportation Center at Rutgers, The State University of New Jersey (VTC) was selected by the Henry H. Kessler Foundation to conduct phase I planning for a Regional Travel Concierge (RTC) program, to increase access to transportation information and options for people with disabilities in the State seeking employment in a competitive work environment. As a national leader in the research and development of innovative transportation policy, VTC is committed to developing projects such as the RTC, which seek to advance a key mission of the Center focused on improving transportation equity for mobility disadvantaged populations.

The RTC concept was a central recommendation included in the five-year transportation plan VTC prepared for the New Jersey Division of Disability Services (DDS) in 2005. The 2005 five-year transportation plan, entitled *Meeting the Employment Transportation Needs of People with Disabilities in New Jersey*, is intended to address transportation barriers to work for New Jersey's disabled population, seventy-six percent of whom are working age. One of the identified barriers is a lack of travel information and personalized assistance for consumers seeking help with the often complex task of trip planning.

Phase I planning activities funded by the Kessler Foundation focused on developing a collaborative framework for successful implementation of the RTC program. This included scoping the most appropriate RTC program and service features for the designated Morris, Sussex and Warren County demonstration region. As part of phase I planning, VTC received invaluable assistance from the following entities: The project Local Implementation Partner (LIP), TransOptions, selected by VTC to help lead the RTC program; a project advisory committee comprised of various state government agency representatives; and a local stakeholder committee comprised of consumers, employers, employment counselors, transportation providers and government representatives residing or working in the project's demonstration region. We also received valuable input from consumer, non-profit, and private sector representatives who participated in focus groups over the course of the grant period.

This final report includes a summary of key milestones of the phase I planning process and recommended next steps to facilitate successful RTC program implementation.

Regional Travel Concierge: Phase I Planning

Convene Advisory Committee & Select Local Implementation Partner

An early step in the RTC phase I planning process was convening a project advisory committee. Advisory committee members included representatives from the following organizations: NJ TRANSIT, NJ Department of Human Services, NJ Division of Disability Services; and the NJ Department of Transportation. In addition, a consumer representative was also selected to serve on the advisory committee. In terms of involvement, the VTC research team worked with the advisory committee throughout the phase I planning study, seeking guidance and advice from members as the planning process progressed.

A critical accomplishment of the advisory committee was the solicitation and selection of the RTC Local Implementation Partner (LIP). The role of the LIP in the phase I planning process was to work with VTC, the project advisory committee and a local stakeholder committee to collaboratively plan a RTC demonstration project designed to increase access to transportation for individuals with disabilities in the designated LIP demonstration region, who are seeking employment in a competitive work environment.

The search for the LIP was initiated last spring when VTC and the advisory committee sent out a request for letters of interest to a total of 281 New Jersey nonprofit organizations, counties and Transportation Management Associations (TMA)¹. Recipients were given over a month to assess their interest in being selected to serve as the LIP and submit their expression of interest to VTC. To assist prospective parties in learning more about the scope of the project and to address any questions/issues, VTC convened an in-person Question & Answer session and also responded to inquiries related to the project and the role of the LIP via email and phone. Interested organizations were advised of the importance of including in their proposal a description of their commitment to regional collaboration and partnering for the RTC project. A copy of the request for expression of interest is included as Appendix A.

Six organizations responded to the solicitation, expressing a desire to serve as the RTC LIP. VTC and the advisory committee reviewed and scored each application based on evaluation criteria that included factors such as the organization's statement of interest and qualifications; understanding of the transportation problems faced by the disabled community seeking employment; relevant past experience; sustainability (e.g. preparedness to participate in the RTC program beyond the phase I planning phase); and proposed RTC implementation region. The organization selected via this competitive process to serve as the RTC LIP was TransOptions, a Transportation Management Association that serves commuters, businesses and municipalities in Morris, Warren, Sussex and suburban Essex, Passaic and Union Counties. Key factors contributing to the selection of TransOptions included the Organization's understanding of the transportation problems facing the disabled community in their service region, their experience with developing innovative community transportation options for transportation disadvantaged populations, their interest in working with diverse stakeholders to create a truly Regional RTC program and finally, their commitment to both the planning and implementation phases of the RTC program.

Solicit Community Input on the RTC Initiative

Following selection of TransOptions as the LIP, a local stakeholder committee was created. The committee is comprised of approximately 25 diverse stakeholders representing local, county or state government entities, consumers and various nonprofit organizations and transportation providers who serve the disabled community in the proposed implementation region (Morris, Sussex & Warren Counties). The primary role of the stakeholder committee was to advise TransOptions and VTC throughout the phase I planning effort. The committee shared their input and suggestions related to the initiative, as well as their unique perspectives and experiences

¹ TMAs are non-profit organizations that collaborate with area employers, consumers and government to address local transportation problems and increase awareness of commute alternatives to driving. There are eight TMAs currently operating in New Jersey.

regarding the proposed demonstration region's transportation environment. The stakeholder committee was convened twice and was kept apprised of project-related updates via email. The group was especially helpful in identifying the appropriate service features to consider for the RTC and in identifying appropriate strategies for addressing potential implementation obstacles, such as finding feasible transportation options for consumers using the RTC service.

In addition to the input received via the stakeholder committee, the research team convened and facilitated two focus groups. The sessions were held as follows:

- October 25, 2006 – Participants: Consumer and social service/non-profit organization representatives
- December 7, 2006 – Participants: Private business sector and social service/non-profit organization representatives

Approximately 15 individuals either residing in or working for organizations located in the Morris, Sussex, and/or Warren County region participated in the two sessions, which convened for two hours each. The agenda at each session focused primarily on participants' general travel experiences and expectations regarding employment travel and input and feedback were sought on the RTC program.

The most frequently cited transportation options used by participating consumers included NJ TRANSIT bus/rail, NJ TRANSIT Access Link, county paratransit, local dial-a-rides, taxis, self-driving and walking. Participants explained that the process of trip planning, from the perspective of both people with disabilities seeking employment and the counselors who assist them, is often overwhelming and is a major obstacle to success in terms of both securing and maintaining employment. Participants noted that one of the most critical components of the trip planning process involves being aware of existing services/providers and what travel options were available to them. At each focus group session the research team heard though that information on available transportation services in the State is limited or fragmented, which has led to a dependence on "word of mouth" as a key means to determining available services. It was further acknowledged that area transportation providers conduct little if any marketing/advertising of their services. Thus, participants indicated that the concierge service could fill this information gap, and the RTC should develop and maintain a comprehensive database of area transportation providers.

Other obstacles and issues identified by participants focused on the limited number of transportation providers/options, limited operating schedules & service areas and the high cost of certain services, such as taxi service. With specific regard to limited operating schedules, several consumers and counselors cited this as a key concern because many of the job opportunities available are in industries or sectors such as retail, where evening and weekend work is required. For many consumers, pursuing work in such fields is not an option because they cannot secure transportation to meet work schedules.

Participants expressed strong support for creation of a "one-stop transportation knowledge source", that could assist consumers, counselors and even employers in determining feasible transportation options to reach work and other key destinations. Participants also expressed support for including travel orientation and training as needed, as part of the RTC program. There was overall consensus that the concierge should operate via a "phone-in model" to ensure

the greatest convenience for users. That being said, there was a recognized need for the RTC to make site visits to various client and community centers to provide in-person assistance when needed.

Participants noted several obstacles to achieving lasting success, relative to addressing transportation barriers for people with disabilities. These include finding feasible, reliable transportation solutions for clients; and fostering more flexibility and cooperation among area transportation providers, especially with regard to cross jurisdiction travel. Participants stressed the importance of developing strong relationships between the RTC and area providers so that issues such as the need for more inter-county travel options can begin to be addressed. In terms of program-related suggestions, participants highlighted the need for an active marketing campaign for the RTC services. They further suggested that once advertising materials for the program are developed, they must be marketed via appropriate venues. Some venue suggestions offered by consumers included local cable television, the Internet, newspapers, radio and via area community centers/organizations, social service agencies and government agencies. Participants also suggested that the State's 211 telephone information hotline be used to refer callers to the RTC program. Other program-related suggestions included the need for the RTC to build and maintain strong relationships with key area partners – in addition to transportation providers – such as consumers, counselors, employers, client agencies, government agencies, nonprofits and community organizations. Finally, it was suggested that the RTC should serve as a trip broker for area non-profits/social service agencies interested in sharing their unused vehicles and/or driver capacity. (Refer to Appendix B to review more detailed focus group findings).

Determine RTC Implementation Strategy

Based on the work of the research team and findings from the focus group discussions and stakeholder committee meetings, a RTC implementation strategy was developed by VTC and TransOptions in December 2006. As agreed upon, the main goal of the project is to create a concierge service that will serve as a one-stop resource to assist area residents with disabilities to obtain and maintain accessible and affordable transportation services, supporting their efforts to work and live independently. The initial strategy is to begin program implementation in Morris County and then extend the program to the larger TransOptions service area, thus validating the service model for replication statewide. Furthermore, TransOptions plans to focus initially on serving people with disabilities and employment transportation needs, but will extend the model to serve other transportation disadvantaged populations as well.

RTC program objectives include 1) Provide robust customized mobility solutions to people with disabilities and other transportation disadvantaged populations; 2) Provide or arrange for training and technical assistance on transportation options and resources for individuals and community organizations; 3) Contribute to transportation planning efforts with local government, employers and human service agencies; 4) Identify unmet transportation needs and facilitate solutions to fill the identified gaps; and 5) Increase community awareness of the needs of transportation disadvantaged individuals.

To implement the RTC program, TransOptions is seeking to secure a staff of two mobility counselors and one assistant, who will first work on building and then maintaining an extensive network & database of the demonstration region's transportation providers. The VTC research team initiated the process of developing the local provider database by conducting phone surveys

with approximately 45 providers serving Morris, Warren and Sussex Counties. Contact information for the majority of those providers was shared by TransOptions and four types of service providers were inventoried and documented via the telephone survey as follows: county services; nongovernmental organization services; Mobility Access Vehicles; and municipal services. The phone survey instrument was designed to determine basic, as well as more detailed information on the services offered by given providers. Question topics included contact information for service providers; use and eligibility requirements for services; hours of operation and service areas; reservation procedures; fare policies; and other relevant information, with an emphasis on service characteristics relevant to employment travel needs.

In addition to building the provider database, the RTC staff will focus attention on establishing client call-in and data management procedures, as well as determine the most appropriate marketing strategy to advertise the RTC program so that a broad audience is reached. That “audience” must include consumers with disabilities and other transportation disadvantaged populations, as well as nonprofit agencies, community organizations, local businesses and county and municipal government.

The core of RTC program implementation will involve the mobility counselors’ one-on-one work with clients to develop individual mobility plans. With regard to this task, VTC and TransOptions anticipate that the process will generally progress in the following manner: a consumer, family member, social service agency representative or other individual will contact the concierge/mobility counselor seeking trip planning assistance; the concierge will then work to understand and assess the client’s travel needs and any special circumstances; the concierge and client will next review and determine together the most appropriate travel options; the concierge will develop an individualized mobility plan for the client and will help the client coordinate and connect with the provider(s); finally, the concierge will monitor client results periodically and will strive to troubleshoot any identified issues/problems. During the client needs assessment process detailed above, the concierge will also arrange for or provide client travel orientation or training if needed. Lastly, the concierge will record unmet client needs, which is a critical task to perform in order to determine appropriate and needed new/enhanced transportation services.

Another key component of RTC work efforts will involve participating in education, planning and advocacy services related to the concierge program. For example, the RTC staff will conduct public awareness training for government and community groups to highlight the needs of transportation disadvantaged individuals and will also participate in municipal, county and regional transportation planning studies as appropriate, advocating to address unmet transportation needs.

Regional Travel Concierge: Next Steps

The VTC research team is proud to report that the phase I planning process for the RTC initiative was successful and the program is primed to begin a two-year implementation and evaluation demonstration period under the guidance and direction of the extremely competent and motivated LIP, TransOptions. The main goal of the phase I planning process was achieved in that a model RTC program has been developed that will contribute to the continued empowerment and independence of consumers with disabilities, by offering them personalized assistance with the often complex task of trip planning. Further, as noted earlier, the RTC initiative will serve the larger community by advocating for new transportation services based on identified unmet client needs.

Below are a series of next steps TransOptions will pursue beginning in January 2007 to ensure successful RTC program implementation. Targeted time frames for task completion are noted.

- Secure funding for RTC phase II implementation (January – June 2007).
 - The projected annual operating budget for the RTC initiative is approximately \$238,000. As such, VTC and TransOptions have researched potential sources for implementation funding and prepared several funding applications to support the phase II effort. Thus far, a \$50,000 grant commitment has been received from the Federal Transit Administration (FTA); \$50,000 from the United Way of Morris County; and \$50,000 from NJDOT. TransOptions has also submitted a proposal to the Kessler Foundation via the Community Employment Grant initiative, requesting \$50,000 for program support and anticipates submitting additional proposals to government agencies and private foundations in the upcoming months to acquire the needed additional implementation funds. Securing this initial implementation funding, as well as more sustainable funding for the RTC program, is considered a key challenge related to RTC implementation.
- Hire staff and recruit partners to begin marketing efforts so RTC services can be offered at TransOptions beginning early summer 2007 (April-June 2007).
- Expand the transportation provider database and work to develop strong relationships with area providers so that the concierge has more opportunities to generate creative transportation opportunities for consumers (January – ongoing).
- Continue meeting periodically with VTC and the advisory committee for program guidance and support and prepare quarterly progress reports through 2008.

Conclusion

The VTC and TransOptions team welcome a meeting with the Kessler Foundation to discuss the RTC program in more detail, if desired. The team is extremely satisfied with the phase I planning results and particularly, with the unanimous support received for the initiative from consumers, nonprofit agencies and government entities who participated in focus groups or via the stakeholder committee. No significant challenges were encountered in the RTC phase I planning process, but as indicated above, challenges related to securing funding and developing cooperative working relationships with area transportation providers are anticipated for the phase II implementation stage. However, with regard to these anticipated challenges, the

implementation team, led by TransOptions, is well prepared to overcome these obstacles due to their early identification in the planning process.

To conclude, the research team is confident that with secure funding and a competent staff, the Regional Travel Concierge will serve as a valuable resource for consumers with disabilities seeking personalized assistance with their trip planning and will serve as a tool to help bridge the gap between New Jerseyans with disabilities who seek employment and existing employment opportunities. Further, it is the ultimate goal and expectation that the coordinated, seamless trip planning assistance offered via the RTC service will be extended to disabled individuals throughout the state, following the successful two-year RTC program implementation demonstration period about to begin.

Regional Travel Concierge: Phase I Financial Summary

Budget Narrative

The VTC research team received a total of \$30,000.00 from the Henry H. Kessler Foundation via the Employment Grant Program to conduct phase I planning activities related to creating a Regional Travel Concierge demonstration project for New Jersey, designed to address transportation barriers to work for people with disabilities. There was no income generated for this project, as it was a planning study and no services that could have generated income were offered. No equipment was purchased with project funding.

The expenditures for the project totaled \$30,000.00 and were devoted to project management efforts led by staff. Key tasks undertaken which incurred the use of funds included the following:

- Managing general project-related activities, including project planning, internal coordination meetings and conference calls, and budget and accounting oversight;
- Monitoring work program implementation and maintaining a list of action items and follow-up tasks;
- Preparing meeting documentation as needed;
- Determining the appropriate advisory committee membership;
- Soliciting and selecting the RTC Local Implementation Partner;
- Determining the appropriate stakeholder committee membership;
- Convening meetings with the advisory committee, stakeholder committee and other interested parties;
- Convening and facilitating two focus group sessions;
- Administering phone survey of approximately 45 area transportation providers to initiate the process of building the demonstration region provider database;
- Defining the services to be offered by the RTC;
- Developing model policies and procedures to guide RTC implementation and determining program monitoring strategies;
- Identifying potential sources for implementation funding and assisting in the preparation and/or review of funding applications to support phase II implementation; and
- Preparing final report.

APPENDIX A:
Request for Expression of Interest

April 7, 2006

To Whom It May Concern:

I am writing to inform you about an exciting new transportation initiative and to invite you to submit a letter of interest to become the local implementation partner for the “***Regional Travel Concierge***” pilot program. Your organization has been asked to submit a letter of interest to become the local implementation partner because of your commitment to and interest in addressing the transportation needs of people with disabilities seeking employment in your community. **Letters of interest should be no longer than five pages long and must be received no later than 4:30 P.M. on May 22, 2006.** Additional background and more detailed guidance on preparing a letter of interest are provided below.

Background and Overview

In 2005, the Alan M. Voorhees Transportation Center (VTC) at Rutgers University completed a five-year transportation action plan for the New Jersey Department of Human Services – Division of Disability Services (DDS). The plan, which is entitled “Meeting the Employment Transportation Needs of People with Disabilities in New Jersey,” is intended to increase employment opportunities for New Jersey’s disabled population by addressing work-related transportation barriers.

In December 2005, VTC received a grant from the Henry H. Kessler Foundation to conduct phase one planning activities to develop a model ***Regional Travel Concierge*** demonstration project for New Jersey. Subsequent phases will involve implementation and evaluation. At this time we anticipate the demonstration period for the program will be three years. Implementing a ***Regional Travel Concierge*** pilot program was one of the key recommendations included in the DDS five-year transportation action plan. A copy of the plan can be downloaded from the VTC website at <http://policy.rutgers.edu/vtc/>.

As conceived, the ***Regional Travel Concierge*** service would function as a one-stop resource for consumers with disabilities offering them a variety of travel-related information and services. These services may include but would not necessarily be limited to: trip planning assistance, travel training, ride matching, trip scheduling and trip brokering.

The role of the local implementation partner in the ***Regional Travel Concierge*** pilot program will involve working with a committee of multi-county stakeholders including consumers, employers, employment counselors and transportation providers to collaboratively plan a demonstration project designed to increase access to transportation for individuals with disabilities seeking employment in a competitive work environment, as well as other transportation disadvantaged populations.

If your organization is selected as the local implementation partner, you will collaborate closely with VTC, a project advisory committee and other partners to conduct the project planning

process. Important elements of that process will include but may not be limited to the following activities:

- Determine what services the **Regional Travel Concierge** should offer and how to best meet the needs and expectations of consumers in the targeted region;
- Develop policies and procedures to guide implementation of the program;
- Prepare a draft operating budget for implementing the program;
- Develop methods to monitor and evaluate program success; and
- Identify potential funding sources to support implementation of the program. At this time we anticipate that the level of funding required to implement the program will be in the range of \$500-750,000 over the three year demonstration period. At the completion of phase one, VTC will work with the local implementation partner, NJ TRANSIT, NJDOT and other potential funding organizations to secure implementation grants.

Guidance on Preparing Letters of Interest

If you wish to be considered as a potential local implementation partner, please forward a letter of interest that addresses the following elements:

- Statement of Interest and Qualifications – Provide a summary description of your organization or team’s interest in becoming the local implementation partner for the **Regional Travel Concierge** pilot program. Provide a brief description of your organization or team’s history, stated missions and goals. Describe any relationships, both formal and informal, your organization or team has with other groups working to meet the employment and transportation needs of people with disabilities. Although organizations may propose by themselves, we encourage applicants to partner with other organizations to demonstrate a commitment to regional collaboration.
- Proposed Implementation Region – A brief description of the implementation region you propose for the demonstration project. For example, we propose to provide regional travel concierge services in County X and County Y.
- Understanding of Problem – Provide a statement demonstrating your understanding of the transportation challenges facing people with disabilities wishing to travel to and from work in the demonstration region proposed. Describe how you believe regional travel concierge services may address some or all of these challenges.
- Past Experience – Provide a brief description of any relevant past experiences/work efforts that demonstrate you and/or your team’s understanding of the transportation issues facing New Jerseyans with disabilities who are seeking employment and other transportation disadvantaged populations.
- Sustainability – Respondents must be able to demonstrate an interest in and ability to participate in a multi-year demonstration project beyond phase one planning activities. Given the focused, location-specific nature of the phase one planning effort, applicants must be able to demonstrate a history and “track record” of performance on multi-year initiatives.

- Letters of support – Please provide letters of support demonstrating the commitment of other agencies, organizations and groups that may be involved in the planning and/or implementation of the **Regional Travel Concierge** pilot program in the proposed implementation region.

Letters of interest should be no longer than five pages and must be received no later than 4:30 P.M. on May 22, 2006. Letters of interest should be mailed to:

*Andrea Lubin, Project Manager
Alan M. Voorhees Transportation Center, Suite 500
33 Livingston Avenue
New Brunswick, New Jersey 08901*

Selection Criteria

The criteria for selecting a local implementation partner will include the following:

1. Qualifications of the respondent/team and organizational relationships between the respondent/team and other groups working to meet the employment and transportation needs of people with disabilities;
2. Demonstrated understanding of the issues and challenges facing people with disabilities wishing to travel to and from work in the proposed demonstration region;
3. Demonstrated commitment to regional collaboration and partnering; and
4. Past performance on multi-year initiatives and relevant experience.

Information Session

VTC will host an informational session on Friday, April 21st at 10:00 am in Room 170 at the Edward J. Bloustein School, located at 33 Livingston Avenue in New Brunswick. This informal meeting will provide you and your partners with an opportunity to learn more about the *Regional Travel Concierge* project and to participate in an open question and answer session with the project team. If you are interested in attending the information session, please contact Andrea Lubin to confirm your attendance by Monday, April 17th at 732-932-6812, ext. 593.

We look forward to seeing you at the information session on April 21st and/or receiving your letter of interest by May 22nd. If you have any questions, please feel free to contact Andrea Lubin at 732-932-6812 ext. 593 or me at 732-932-6812 ext. 606.

Sincerely,

Jon A. Carnegie, AICP/PP
Assistant Director

Enclosures:

Project Background document
Directions to Edward J. Bloustein School for April 21st Information Session

APPENDIX B:
Focus Group Meeting Reports

MEETING DESCRIPTION: Kessler Foundation
Regional Travel Concierge Pilot Project:
Consumer/Agency Focus Group

DATE: October 25, 2006

Location:
United Way of Morris County
Cedar Knolls, New Jersey

PREPARED BY: Alan M. Voorhees Transportation Center
Rutgers, The State University of New Jersey

NOTES:

- This focus group was conducted to inform an initiative undertaken by the Alan M. Voorhees Transportation Center (VTC) to develop a Regional Travel Concierge program in the Morris, Sussex and Warren County area, to be piloted by the Transportation Management Association TransOptions. Funded by the Kessler Foundation, the project derives from recommendations included in a five-year transportation plan VTC presented to the NJDDS in 2005, entitled *Meeting the Employment Transportation Needs of People with Disabilities in New Jersey*. The plan addressed transportation barriers to work encountered by people with disabilities.
- The focus group was facilitated by Jeff Bashe of TransOptions and Andrea Lubin of VTC. A total of three consumers and four representatives from local social service agencies attended the session. They resided or provided services in the following counties: Morris, Warren and Sussex.

DISCUSSION:

Meeting participants were engaged in a discussion focused on their general travel experiences and expectations, employment travel experiences, and on how the regional travel concierge program could be designed to best meet their transportation needs. Specific questions/topics were presented as follows:

General Travel Experiences and Expectations

What transportation options are generally available to you or your clients in the area?

Options cited by participants included NJ TRANSIT's Access Link, Morris Area Paratransit (MAPS) and local dial-a-ride services. One consumer said she is able to drive, but only for short distances and not during inclement winter weather. Another consumer said he sometimes must pay to ride a taxi to work because he works irregular hours. In terms of other travel options, agency representatives also mentioned Morris on the Move, a shuttle service that operates between Budd Lake and Dover.

How did you or your clients find out about these options? Did you have difficulty locating this information?

One consumer reported he discovered MAPS “by seeing their blue bus” and was aware of Access Link through work he does for an agency that provides disability services. Another consumer indicated he located transportation information by searching municipal websites in his region. An agency representative reported she learned of area transportation services through professional networking. Most participants stressed that transportation providers conduct little marketing/advertising of their services and that the information available is fragmented.

What is the most popular area transportation option?

Consumers and agency representatives agreed that MAPS was the most popular service in the area, although it was noted that the service can be difficult to access because it is frequently booked. An agency representative reported the eligibility process to qualify for Access Link serves as a deterrent because of the need to travel to Newark for an interview. Several consumers said the use of taxis was not a viable option due to the prohibitive cost.

For those of you working, how do you travel to/from your employment site and in what ways is transportation a barrier to finding and keeping a job?

Two consumers reported they are currently employed and the third indicated involvement in a job training program. One consumer said he uses MAPS to travel to/from work but explained that their limited schedule poses difficulties for those who rely upon the service for employment trips. Specifically, he explained that he is unable to get to work until 9:30 a.m. because MAPS drivers do not start their runs until after 9:00 a.m. In addition, the service closes before 5:00 p.m. As a result, he must rely on friends, family and co-workers for a ride home. Another consumer said he relies on a combination of fixed route bus service and taxis during weekdays and train service on weekends. On some days, his job concludes at 2:00 p.m., forcing him to wait until 2:30 p.m. to walk to a train station which is physically challenging. Also, the costs associated with the taxi service he takes several times a week is difficult for him to manage with his salary. Another consumer said her job training program is within a five-minute drive of her home, but she is reluctant to drive during winter weather and must use a vehicle that can accommodate a wheelchair. She added that because Access Link service requires advance booking by several days, it does not offer a realistic travel option if people cannot drive on a given day due to inclement weather conditions.

An agency representative pointed that out that a requirement to achieving self-sufficiency is securing full-time employment, yet the current hours of service of transportation providers do not match with typical work/commuting schedules. As a result, many clients are forced to work part-time or stay home and not work at all. Those working part-time are often limited in their ability to earn higher wages and to qualify for medical benefits. Overall, agency representatives indicated that “large numbers” of clients have been shut out of employment due to lack of transportation. One agency representative stressed that at least one-third of its job placements are typically in the retail sector, an industry in which employees are typically expected to work weekends, nights and other atypical hours. Unfortunately, current transportation provider schedules rarely accommodate such trips.

Does the way you get to work, work for you or your clients?

An agency representative reported that working with employed clients and their prospective or current employers to address transportation issues can be successful if the given employer is accommodating and sensitive to a particular transportation issue/problem. However, the task is made difficult by the overall lack of available transportation service on weekends and off-hours. In addition, changes in management at a given client's place of employment can pose problems, since new supervisors may not be willing to accept arrangements related to transportation honored by their predecessor. One agency representative responded that efforts should be made in the State to expand transportation options, so that the need for counselors and clients to seek flexibility from employers can be reduced.

Another agency representative explained that arranging transportation for jobs located outside Morris County poses challenges because of the lack of provider coordination across counties. For example, the representative reported on a client whose job was located ten minutes from his home in Essex County, yet he was unable to secure transportation because of the need to cross county lines. A representative from another agency said a client who worked in Sussex County was able to work out arrangements to cross county boundaries. However, this required persistence on the part of both client and agency.

Agency representatives also cited situations in which clients arranged for Access Link service during bad weather and then waited outdoors for the van to arrive. When the client returned inside to get a break from the inclement weather, the van arrived and not seeing anyone, left empty.

A further complicating factor in terms of transportation mentioned by consumers and agency representatives involves finding housing that is located close to transit stops or that has access to sidewalks to accommodate pedestrian travel.

One client explained that the willingness of her current employer to accommodate her travel needs has precluded her from searching for a higher paying and more challenging job opportunity. "We are people who want to work and it makes it so frustrating," she said.

What is the single most important transportation-related issue facing people with disabilities in NJ in terms of finding and keeping a job?

There was consensus that a lack of transportation options/providers and the limited timing/schedules offered by current providers were huge issues and barriers to people with disabilities seeking employment. In addition, provider unwillingness to cross county boundaries was also mentioned as a key concern and obstacle to consumers seeking employment.

Regional Travel Concierge Program

Mr. Bashe and Ms. Lubin reported that TransOptions had been selected by VTC to help create and pilot the regional travel concierge program, with the goal of developing a service that functions as a one-stop resource for consumers with disabilities seeking employment opportunities, offering them a variety of travel-related services via personalized assistance from a mobility counselor, i.e. the Concierge. Specific questions related to the concierge initiative were presented to participants as follows:

What type of assistance/features would be most helpful to you or your clients if offered by a concierge service?

Agency representatives reported that the level of difficulty involved with the task of arranging employment-related transportation depends upon the client and his/her travel and personal needs; some clients require little to no help, while others require substantial assistance. In many cases, agency participants said that finding a client a job required less time than finding transportation options to get to the job. One instance in particular was cited in which an agency representative spent over two weeks arranging transportation for a client, which ultimately required rescheduling a fixed bus route. It was also reported that in some cases, job opportunities have been lost during the time frame it took to explore and arrange transportation options to a given job site.

In this context, participants reported that having access to a “one-stop knowledge source” of area transportation information who could help plan and schedule trips would be extremely beneficial, especially for consumers seeking employment. Agency representatives specifically noted that the concierge service would facilitate the work they already perform for their clients and would be time-saving. They added that many counselors/agency representatives who work with clients do not possess a comprehensive knowledge of transportation options and further, most often do not have the time or resources to try to develop “creative” transportation solutions for clients experiencing difficulties securing transportation.

With regard to trip scheduling, Mr. Bashe explained that some initial assistance with trip scheduling may be feasible via the concierge service but he emphasized the focus must be on getting the client in touch with the provider.

In addition to participant requests for concierge assistance with trip planning and scheduling, the issue of travel training was discussed. One consumer reported that he had signed up for travel training offered by NJ TRANSIT and thought it would offer helpful information. He opined though that many other persons with disabilities are unaware that such training is available. Another client said that he already received travel training, but indicated it did not help him with his travel issues, primarily because he lives across a four-lane highway from the transit stop.

One agency representative noted that there are instances in which family members are fearful of public transit as a transportation choice and thus are not interested in their loved ones with disabilities seeking travel training. Overall there was agreement that offering or facilitating travel training as a feature of the concierge service could be valuable but it was stressed that the availability of transit service is a far larger concern than the availability of travel training.

How would you or your clients prefer to access the Concierge service?

Participants generally agreed it would be beneficial for the concierge service to operate via a telephone center model. The prime reason for the support of a phone-in model focused on the convenience such a model offers for all parties. Some noted that the phone-in model would offer a less intimate service than an in-person one-stop center, but it was suggested that concierge staff should travel to various area social service agencies on a periodic basis to provide in-person assistance to consumers who have difficulty articulating via telephone or who are experiencing other problems planning their trips via a phone-in model.

What are some obstacles you think the concierge service could face during implementation?

Participants noted that the concierge will face the obstacle of getting the area's various transportation providers to work cooperatively with one another to help accomplish tasks such as providing service that crosses county boundaries. Mr. Bashe and Ms. Lubin responded that the concierge could serve as a broker in such situations, and added that the concierge will also document unmet travel needs. By performing this latter task and alerting area providers to untapped demand, the concierge could actually help to create new transportation services.

Agency representatives also explained that the concierge attempting to schedule trips will face difficulties arising from the common occurrence of having to deal with providers who make decisions, often without sound reason or justification, to alter their previous commitment to provide rides along a certain route or at a given time for a consumer. Agency representatives emphasized that they need transportation providers to make and keep solid commitments to consumers with regard to delivering consistent service. Examples were cited in which providers have missed pick-ups and then fail to provide the service altogether. Such action negatively impacts consumers currently employed, as well as those seeking employment.

Participants also cited the importance of coordinating the selection of any concierge program software (e.g. scheduling software) to assure compatibility among diverse users.

Aside from area transportation providers, who should the concierge work to build strong relationships with in an effort to promote the concierge service and ensure it is meeting demand?

It was noted that the concierge must focus attention on building strong relationships with consumers and the social service agency representatives/counselors who serve them. Agency representatives also suggested that the concierge should work with the local chambers of commerce to increase awareness among employers of the concierge service and of the more basic fact that transportation services are available for disabled persons, thereby expanding a given employer's potential hiring base. It was further recommended that the concierge should reach out and build partnerships with representatives from county governments, municipalities, community organizations and area Workforce Investment Boards (WIBs).

To build these above suggested relationships and to promote awareness for the concierge service, it was recommended that an advertising/marketing campaign be developed. Consumers suggested that the service be advertised on local cable television, the internet, newspapers, radio and via area community centers/organizations, social service agencies and government agencies. It was also recommended that information on the service be included on the State's 211 telephone information hotline.

Concluding Thoughts

Participating consumers and agency representatives agreed that the concierge service will help serve unmet needs in the disabled community in terms of providing much needed personalized assistance to help consumers with trip planning activities.

MEETING DESCRIPTION: Kessler Foundation
Regional Travel Concierge Pilot Project:
Business/Agency Focus Group

DATE: December 7, 2006

Location:
Morris County Chamber of Commerce
Cedar Knolls, New Jersey

PREPARED BY: Alan M. Voorhees Transportation Center
Rutgers, The State University of New Jersey

NOTES:

- This focus group was conducted to inform an initiative undertaken by the Alan M. Voorhees Transportation Center (VTC) to develop a Regional Travel Concierge program in the greater Morris, Sussex and Warren County area, to be piloted by the Transportation Management Association TransOptions. Funded by the Kessler Foundation, the project derives from recommendations included in a five-year transportation plan VTC presented to the NJDDS in 2005, entitled *Meeting the Employment Transportation Needs of People with Disabilities in New Jersey*. The plan addressed transportation barriers to work encountered by people with disabilities.
- The focus group was facilitated by Jeff Bashe of TransOptions and Andrea Lubin of VTC. There were a total of six participants: one from a government agency, one from the private business sector, and four from area nonprofit organizations. Two of the non-profit organizations in attendance indicated they provide transportation services for their participants. All focus group participants were located in the Morris, Sussex and/or Warren County area, except for one organization that was located in Essex County.

DISCUSSION:

Meeting participants were engaged in a discussion focused on the general travel experiences of their clients or employees and on how the regional travel concierge program and one-stop transportation information resource center could be designed to best meet their client or employee transportation needs. Specific questions/topics were presented as follows:

General Travel Experiences

What transportation options are generally available in the area for your clients or employees and how do most access work sites?

Options cited by participants included driving, walking, NJ TRANSIT fixed route bus and train service, Morris Area Paratransit (MAPS), local dial-a-ride services, taxi service, carpooling and NJ TRANSIT Access Link. Participants stressed that although taxi service is often a convenient means to reach employment sites, it is too costly to be a realistic option for most clients. As one participant explained, many of her clients have entry level jobs at local food stores and are often spending \$40 or more for their transportation to/from work via taxi. Another participant explained that Access Link is not frequently an option in the Morris area because its geographic

coverage area is not extensive. The private employer participant noted that his employees generally drive or carpool to their work sites, with very few utilizing public transit.

How did you or your clients find out about these options? Did you have difficulty locating this information?

Participants commented that transportation providers conduct little marketing/advertising of their services and that the information available is fragmented. As such, the primary means through which they become aware of existing services is through “word of mouth”. One participant remarked that her organization has “no one to turn to” for assistance in determining transportation options for her clients.

Do you as an employer offer any type of shuttle service for your employees or are you aware of such services in the aware?

The employer participant indicated that since he managed several small branch offices in diverse locations, operating an employee shuttle service was neither needed nor would it be economically feasible. He added though that if he operated one large branch office with a sizeable workforce, investigating use of a shuttle service for those employees would likely be considered.

What is the single most important transportation-related issue facing people with disabilities in NJ in terms of finding and keeping a job?

There was consensus that a lack of transportation options/providers and the limited timing/schedules offered by current providers were huge issues and barriers to people with disabilities seeking employment. In addition, the prohibitive cost of some services, such as taxis, was cited as a barrier, as was limited geographic coverage offered by many providers. With regard to the last point, one participant noted that area transportation service seems to primarily be limited to Routes 10 and 46. Finally, one participant noted that consumers need reliable and consistent transportation for employment trips and those are two features many current transportation options do not offer.

In terms of possible solutions to the above mentioned transportation-related issues, several participants explained that their staff tries to work with clients to think of “creative” transportation options, such as creating a shuttle service, but that the obstacle to such solutions is often lack of funding. In response, one participant suggested that social service agencies should consider approaching private area transportation providers, such as limousine services, to see if an arrangement can be brokered to offer clients rides at a discounted rate.

Regional Travel Concierge Program

Mr. Bashe and Ms. Lubin reported that TransOptions had been selected by VTC to help create and pilot the regional travel concierge program, with the goal of developing a service that functions as a one-stop resource for consumers with disabilities seeking employment opportunities, offering them a variety of travel-related services via personalized assistance from a mobility counselor, i.e. the Concierge. Specific questions related to the concierge initiative were presented to participants as follows:

What type of assistance/features would be most helpful to you or your clients if offered by a concierge service?

Participants reported that having a one-stop resource to assist with trip planning would be beneficial to clients, as well as to the agencies that serve them. Several participants also indicated that offering travel training would be a valuable component of the concierge service. One participant reported that his organization currently offers travel training and noted such training typically involves several elements, including teaching personal safety and awareness.

Discussion also focused on how the concierge could perhaps function as a trip broker, working with area organizations who are interested in sharing their vehicles and/or drivers for a fee with other entities. While it was noted that insurance liability and other issues would have to be first addressed, there was general support among participants who provide transportation for considering how to make better use of existing resources, which include their vehicles, in an effort to serve unmet transportation needs.

How would you or your clients prefer to access the Concierge service?

Participants generally agreed it would be beneficial for the concierge service to operate via a telephone center model. The prime reason for the support of a phone-in model focused on the convenience such a model offers for all parties.

It was suggested that concierge staff should travel to various area social service agencies, government agencies (e.g. One-Stop career centers) and to other groups that work with consumers with disabilities (e.g. Parents of Exceptional Children) on a periodic basis to provide in-person assistance.

What are some obstacles you think the concierge service could face during implementation?

Participants noted that the concierge will face the obstacle of finding transportation options for consumers that offer reliable and dependable service. It was also noted that the concierge should be prepared to service non-English speaking callers and that not offering such assistance could be a hindrance to the expansion of the service in the community. Finally, several participants explained that any trip brokering activities undertaken by the concierge would necessitate helping interested providers deal with issues such as insurance liability.

Do you have any other suggestions and/or concerns related to the regional concierge service you would like to share with us?

Participants cited a need to market the service to area non-profits, social service agencies and government in an effort to reach a wide audience of consumers. The idea of pursuing marketing/advertising strategies such as cable television and radio, were not generally supported among the group though, as several indicated such efforts would not likely be needed if outreach was conducted with the appropriate area social service agencies.

Concluding Thoughts

Participants agreed that both the concierge service and web portal concepts have merit and were worth pursuing as they will serve unmet needs in the disabled community. Several participants reiterated their earlier remarks that area social service agencies providing transportation should

work together to examine opportunities to broker services and/or share vehicles, especially because such action could help serve unmet needs and would be cost effective to participating organizations.

APPENDIX C:
Stakeholder Committee Meeting Reports

Meeting Description: Regional Travel Concierge Stakeholder Meeting

Date: September 25, 2006

Location:
United Way Headquarters
Cedar Knolls, New Jersey

Prepared by: TransOptions & the Alan M. Voorhees Transportation Center (VTC)

ATTENDEES:

Theresa Davis	Morris County
Ed Facas	Morris County
Tom Drabic	Sussex County
Mary Emilius	Sussex County Chamber of Commerce
Lorraine Hentz	Sussex County
Ronnie Siriani	NJ Transit
Art Ondish	Mt. Arlington
Phyllis Doyle	United Way of Morris County
Al Hagert	NJ DVRS
Mark Stephenson	Employment Horizons
Lisa Montalbano	Employment Horizons
Jerry Rohsler	Morris County
Carmela Slivinski	DAWN
Marc Molde	DAWN
Todd Roast	JVS MetroWest
Jim Benson	Stanhope Township
Gretchen Haas	Morris County
Amy Wexler	Morris County
Floyd Borden	NJ DHS
Jon Carnegie	Voorhees Transportation Center
Andrea Lubin	Voorhees Transportation Center
Pippa Woods	Voorhees Transportation Center
John Ciaffone	TransOptions
Jeff Bashe	TransOptions

INTRODUCTION:

This was the first meeting of the Regional Travel Concierge stakeholder committee. The purpose of the session was to provide the committee with an opportunity to learn more about the Regional Travel Concierge project and how it can be designed to help transportation disadvantaged individuals in the community who are seeking employment achieve the goal of living a more fully independent and self sufficient lifestyle.

TransOptions was selected to scope and develop the Concierge program with guidance from the Alan M. Voorhees Transportation Center (VTC) at Rutgers University. The prime role of the stakeholder committee will be to work with TransOptions and VTC as they complete Phase I planning activities for the Regional Travel Concierge initiative, primarily by sharing their thoughts and perspectives on planned program features and elements.

DISCUSSION:

Jeff Bashe, TransOptions, welcomed participants and introduced the VTC team members in attendance – Jon Carnegie, Pippa Woods and Andrea Lubin. Mr. Carnegie provided background information focused on the project’s history and purpose, and Ms. Lubin reviewed the anticipated project key tasks and targeted completed dates.

Mr. Bashe then facilitated an open discussion amongst participants to determine committee member thoughts and perspectives on the most appropriate service features to consider for a Regional Travel Concierge program. Potential obstacles/issues related to implementation were also mentioned.

The following are highlights from that discussion:

- There was general support for development of a Concierge service that includes a comprehensive menu of features, including ride matching, as well as some degree of trip scheduling.
- The service should strive to reduce existing barriers for cross county travel and intra-county travel, as well as foster more cooperative relationships among area providers.
- Several participants who currently work with consumers seeking employment noted that locating transportation options is a significant overall obstacle for their clients. Specifically, finding transportation providers that serve typical work hours (9-5), as well as untraditional work hours required by popular industries such as retail, is difficult.
- The Concierge initiative must be designed so it can interface cooperatively with existing programs that may offer similar or related services.
- The service must be structured in a very supportive manner, especially since many of the client population seeking the service may need extensive assistance.
- One of many potential benefits of the Concierge service is that unmet needs can be documented by the Concierge and used for future advocacy work in finding new transportation solutions.

- One feature the Concierge service should offer to working consumers is arranging for emergency ride home services, if needed. This should be coordinated, where possible, with current TransOptions programs offering such rides.
- Collaborative efforts and open communication between the Concierge service, area Workforce Investment Board, one-stop centers, businesses and business oriented agencies/organizations (e.g. Chamber of Commerce) should be encouraged, as a means to engage employers in the service and to work together to develop innovative solutions, such as making the Concierge aware of a given company's shuttle programs, etc.
- The Concierge service should be designed to offer assistance by phone, in-person and perhaps at large venues/sites, such as a shopping mall or senior center, in an effort to promote awareness among targeted consumers. Some participants expressed hesitation for designing a program whereby counselors would have to travel off-site.
- The project team should consider examining the NJ WINS coaching system initiative, whereby counselors provide consumers with support in navigating the social security system, as one potential consumer-focused service model.
- The Concierge program may present opportunities for shared services among providers, for which grant funding could be sought. The project team noted that while increased coordination among providers and shared use of the existing infrastructure may ultimately be a positive by-product of the Concierge initiative, it will not be the main focus of the program. Instead, success of the program will be predominately based on the service's ability to address the transportation barriers of those with disabilities seeking competitive employment opportunities.
- With regard to potential implementation obstacles, the following was noted:
 - Meeting the demand and finding a supply of feasible transportation options, especially for those seeking transportation to/from work, will be difficult. It was noted that employment trips are often particularly difficult to serve due to the hours associated with them. In response, one participant remarked that efforts should be made by the Concierge service to collaborate with area employers to address any concerns and/or suggestions they may have for the program and that the Concierge should also dedicate time to building strong relationships with area providers.
 - Consumers seeking work trips may also need to travel with their children to daycare facilities as part of their overall trip. This raises some liability as well as feasibility concerns.
 - Travel training is a complex task, which involves more than teaching familiarity with travel systems. For example, participants are typically instructed how to handle emergency situations, financial issues, etc. Thus, offering travel training as a feature of the Concierge Service may be to time and resource intensive. Other travel training options should be identified and used as appropriate (e.g. NJTIPS).
 - If a given client misses a particular travel connection, it may be difficult to make another connection immediately, especially due to the fact that the service area is largely suburban, without the benefit of frequent transit service. Thus, the Concierge counselor planning trips must consider this possible obstacle and its

potential impact for consumers making employment-related trips. Contingency plans for such missed connections must be discussed and developed and work should be undertaken to help improve existing linkages between the area's different transportation services.

- Liability and operational issues would be a likely concern/issue, especially for smaller non-profits, if any vehicle sharing activities are pursued. It was also noted that very few area non-profits likely have a fleet of accessible vehicles that could be shared.

CONCLUSION

Mr. Bashe concluded the meeting by thanking participants for their candid participation in today's discussion. Participants were notified that the stakeholder committee will likely be convened 2-3 occasions prior to the anticipated completion of Phase I planning work in January 2007. As such, he indicated that TransOptions would be reaching out to the committee via email in the near future to select a November stakeholder committee meeting date.

Mr. Bashe also requested participant assistance over the next few weeks in helping to solicit area consumers, businesses and nonprofits to participate in several focus groups on the topic of the Regional Concierge, to be held in October.

Meeting Description: Regional Travel Concierge Stakeholder Meeting

Date: December 14, 2006

Location:
United Way Headquarters
Cedar Knolls, New Jersey

Prepared by: TransOptions & the Alan M. Voorhees Transportation Center (VTC)

ATTENDEES:

Andy Swords	NJDOT
Ed Facas	Morris County
Tom Drabic	Sussex County
Liz DeRuchie	NJTPA
Bob Panzer	Consumer
Art Ondish	Mt. Arlington
Phyllis Doyle	United Way of Morris County
Bob Koska	NJ Transit
Helen Kirsch	NJ Transit
Peggy Miller	Abilities of NW NJ
Jerry Rohsler	Morris County
Carmela Slivinski	DAWN
Marc Molde	DAWN
Renee Palermo	Township of W. Milford
Andrea Lubin	Voorhees Transportation Center
John Ciaffone	TransOptions
Jeff Bashe	TransOptions

INTRODUCTION:

This was the second and final meeting of the Regional Travel Concierge (RTC) stakeholder committee. The main purpose of the session was to provide the committee with a final update on the project's planning phase as it draws to a conclusion; to discuss next steps related to program implementation; and to receive feedback on the planned implementation strategy.

John Ciaffone, President of TransOptions, welcomed the assembled group and thanked them for giving their time, effort and dedication to the planning phase of the Regional Travel Concierge initiative. He reported that TransOptions is most eager to begin the implementation phase of this project in early 2007.

DISCUSSION:

RTC Goals & Objectives

Jeff Bashe, TransOptions, reminded the group that the prime goal of the RTC initiative is to create a one-stop center to assist area residents with disabilities to obtain and maintain accessible and affordable transportation services, supporting their efforts to work and live independently. He reported that the initial strategy is to begin program implementation in Morris County and extend the program to the larger TransOptions service area afterwards, eventually validating the service model for replication statewide. Mr. Bashe added that the RTC will support all transportation disadvantaged populations.

In terms of RTC program objectives, they were described as follows:

- Provide robust customized mobility solutions to people with disabilities and other transportation disadvantaged populations.
- Provide training and technical assistance on transportation options and resources for individuals and community organizations.
- Contribute to transportation planning efforts with local government, employers and human service agencies.
- Identify unmet transportation needs and facilitate solutions to fill the identified gaps.
- Increase community awareness of the needs of transportation disadvantaged individuals.

RTC Focus Groups

Andrea Lubin, Voorhees Transportation Center (VTC), reported on the focus groups convened during the RTC planning phase. She noted that two meetings were held with consumers, non-profit agencies, government agencies and private businesses. The sessions each lasted approximately two hours and were facilitated by Ms. Lubin and Mr. Bashe. The agenda at each focused primarily on participants' general travel experiences and expectations regarding employment travel and input was also sought on the RTC model. Ms. Lubin reported that the project team was most pleased by the enthusiastic support and positive feedback for the project expressed by participants.

In terms of general travel experiences, the project team consistently heard that trip planning, from the perspective of both people with disabilities seeking employment and the counselors who assist them, can be overwhelming and is a major obstacle to success in terms of both securing and maintaining employment. Transportation options currently used by participants include NJT bus/rail, Access Link, MAPS, local dial-a-rides, taxis, self-driving, carpooling and walking.

Obstacles and issues associated with using many of these travel modes to get to and from work generally focused on:

- The limited number of area providers/options;
- Limited operating schedules & service areas;
- The high cost of certain services, such as taxi service; and
- Limited or fragmented information on available services, which has led to a dependence on “word of mouth” as a key means to determining what transportation services are available. It was acknowledged that area transportation providers conduct little if any marketing/advertising of their services.

With regard to the obstacle of limited operating schedules, several consumers and counselors cited this as a key concern because many of the job opportunities available are in industries or sectors such as retail, where evening and weekend work is required. For many consumers though, pursuing work in such fields is not an option because they cannot secure transportation to meet those work schedules.

In terms of feedback on the RTC program, as indicated above, participants expressed strong support for creation of a “one-stop transportation knowledge source”, which could assist both consumers and counselors and even employers in determining feasible transportation solutions to reach work and other key destinations. Support was also expressed for including travel orientation and training as needed, as part of the Concierge program.

There was also overall consensus that the Concierge should operate via a “phone-in model” to ensure the greatest convenience for users. That being said, there was also support for the idea that the Concierge should make site visits to various client and community centers to provide in-person assistance when needed.

Focus group participants were also asked for their thoughts on potential obstacles the program will have to overcome in order to achieve success. The two main obstacles cited were finding feasible, reliable and affordable transportation solutions for clients and fostering more flexibility and cooperation among area transportation providers.

In terms of program-related suggestions shared, they focused on the following:

- Conduct an active marketing campaign for the Concierge service via means including advertising the service on the internet, in area newspapers, radio, local cable television, on the state’s 211 information line and through area client centers, community organizations and nonprofits.
- Build and maintain strong relationships with key partners (including consumers, counselors, employers, client agencies, nonprofits, community organizations and transportation providers).
- Design the service so the Concierge can serve as a trip broker for area non-profits/social service agencies interested in sharing their unused vehicles and/or driver capacity. Two nonprofit providers who attended one of the focus group sessions specifically noted that such action could be beneficial in terms of meeting unmet travel needs, as well as providing economic benefits to their respective organization.

RTC Program: Services

Mr. Bashe reported that the RTC program will be designed to offer customized mobility assistance to its targeted consumer population. To accomplish this goal, a staff of two mobility counselors and one assistant will likely be assembled to work on the following tasks:

- Build and maintain an extensive network & database of local transportation providers
- Establish client call-in and data management procedures
- Market the availability of services to reach a broad population (clients; agencies; support organizations; businesses; municipalities; counties, etc.)
- Create individual mobility plans for clients, which involves:
 - Understanding client needs & any special circumstances
 - Reviewing available options and recommending/creating feasible options
 - Coordinating with & connecting clients to provider(s)
 - Providing or arranging client travel orientation or training a needed (e.g. NJ TIP)
 - Monitoring results periodically & troubleshooting any identified issues/problems
 - Recording unmet client needs

Another key component of RTC work efforts will involve participating in education, planning and advocacy services related to the Concierge program. For example, the RTC staff will conduct public awareness training for government and community groups to highlight the needs of transportation disadvantaged individuals and will also participate in municipal, county and regional transportation planning studies as appropriate. Finally, the RTC will work with government, agency, business and provider partners to increase transportation coordination and advocate for the development of cost-effective new services based on identified unmet needs.

RTC Program: Next Steps & Challenges

Mr. Bashe explained that anticipated next steps related to the RTC program are as follows:

- Present phase I project findings to the Kessler Foundation. At this time, no further stakeholder committee meetings will be planned.
- Develop funding for Phase II implementation (January – June 2007)
 - Annual operating budget projected at \$238,000
 - Commitment from FTA of \$50,000
 - Proposal submitted to Kessler Foundation for \$50,000
 - Some existing United Way and NJT funding available
 - Proposals to be made to government agencies & private foundations
- Hire staff and recruit partners to begin marketing efforts so services can be offered beginning July 2007.
- Continue meeting with VTC and the Concierge advisory committee and preparing quarterly progress reports through 2008.

Mr. Bashe explained that challenges associated with project implementation are primarily focused on securing initial and sustainable funding for the RTC program, finding appropriate staff members to manage the program, and developing relationships with area providers to promote creative transportation solutions for clients.

QUESTIONS/COMMENTS:

Questions and comments posed by participants include the following:

- A participant asked if the RTC model would be designed to accommodate a consumer who would need to correspond with the Concierge via email or a means other than telephone, due to disabilities such as speech impediments. The project team responded affirmatively and reported that the Concierge will be cognizant that not every consumer will be able to utilize the phone-in model.
- A participant noted the importance of having providers train their drivers in sensitivity related to people with disabilities.
- With regard to the discussion on potential funding opportunities for the RTC initiative, Bob Koska, NJT, explained that mobility management is now deemed an eligible expense under various federal grant programs, such as the FTA 5310 program and New Freedom initiative, and thus, the project team should consider seeking funding from such sources in 2007. Liz DeRuchie, NJTPA, added that CMAC funding possibilities should also be considered.
- A participant expressed support for the RTC plan to have staff record unmet client needs, as this information will be critical in determining the most appropriate new or expanded services to advocate and pursue.
- A participant remarked that while encouraging vehicle brokerage efforts among area providers will be difficult to achieve, the benefits are numerous, as such action will help to serve unmet needs. Further, by promoting cooperative vehicle sharing, the number of providers traveling with one or only a few passengers in their respective vehicles will hopefully diminish.

CONCLUSION

Mr. Bashe concluded the meeting by thanking the group again for their participation in today's discussion and for their dedicated efforts to the RTC program. He advised that although future meetings of the stakeholder committee are not anticipated at this time, all members will continue to be updated on the project's progress via email.

APPENDIX D:

Revised Program Development Plan

Revised Program Development Plan For:		Alan M. Voorhees Transportation Center Rutgers, The State University of New Jersey	
Program Goal(s):	To conduct Phase I planning activities related to creating a <i>Regional Travel Concierge (RTC)</i> demonstration project for New Jersey designed to address transportation barriers to work for people with disabilities.		
Resources	Activities	Outputs	Outcomes (As of January 2007)
<ul style="list-style-type: none"> ▪ \$30,000 budget received from the Kessler Foundation to scope and conduct planning for the <i>Regional Travel Concierge</i> pilot project. ▪ Experienced VTC staff, led by Principal Investigator Jon Carnegie and Project Manager Andrea Lubin. ▪ Collaboration partners, including NJDDS, NJDOT and NJ TRANSIT to assist in project development. 	<ul style="list-style-type: none"> ▪ Solicit letters of interest to recruit a local implementation partner. ▪ Create project advisory board, comprised of a diverse range of stakeholders. ▪ Conduct survey of consumers who utilize the county transportation system(s) in the region of the designated local implementation partner. ▪ Define services to be provided by the <i>Regional Travel Concierge</i> pilot. ▪ Confirm existing databases to ensure accurate inventory of transportation services, providers and eligibility requirements in the demonstration region. ▪ Develop detailed operating plan and budget. ▪ Develop strategies that will ultimately guide project implementation and determine how best to monitor and evaluate success. 	<ul style="list-style-type: none"> ▪ Appropriate components for a successful <i>Regional Travel Concierge</i> pilot identified. ▪ Detailed action plan developed to advance <i>Regional Travel Concierge</i> concept to implementation stage. ▪ Monthly meetings convened with designated stakeholders, the advisory board and collaborating partners. ▪ Detailed information related to consumer needs and the characteristics of available travel options in the targeted region identified. 	<ul style="list-style-type: none"> ▪ A Local Implementation Partner was selected, TransOptions, who worked with VTC to determine the services to be offered by the <i>RTC</i> and the most appropriate program implementation strategy. TransOptions has now initiated the implementation phase. ▪ Transportation providers have begun to become aware of the <i>RTC</i> pilot project via outreach efforts and the provider phone survey initiated in phase I. ▪ Transportation providers have begun to understand better consumer needs and expectations and will continue to do so through interactions with <i>RTC</i> staff and <i>RTC</i> outreach efforts. ▪ Consumers have begun to understand better provider capabilities and resources related to meeting their needs and will continue to do so through interactions with <i>RTC</i> staff and <i>RTC</i> outreach efforts. ▪ The framework for a sustained collaborative partnership between consumers, transportation providers, employers, employees, employment counselors and state, county and local agencies is now in place. ▪ The <i>RTC</i> project has received implementation funding support from the FTA, United Way and NJDOT and is well positioned to receive additional funding for the 2-year demonstration phase from other sources.