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Special thanks also goes out to all the residents, business leaders, state, regional and local government officials and the many others who participated in the public participation efforts associated with this study. These individuals provided comment and input on preliminary drafts of the report and shared information throughout the planning process.
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Executive Summary

Project Summary
The Regional Transportation Authority (RTA) conducted a planning effort to identify and recommend regional and local strategies that encourage the most effective use of available community transportation services to enhance mobility for the region’s older adults, persons with disabilities and persons with low incomes. This planning effort is known as Connecting Communities through Coordination. The scope of the project covered the seven counties of Cook, DuPage, Lake, Kane, Kendall, McHenry, and Will, and builds upon the existing coordination plans in the region that have been developed, or are in the process of being developed. In part, Connecting Communities through Coordination is driven by the Safe, Accountable, Flexible, Efficient Transportation Equity Act – A Legacy for Users (SAFETEA-LU). This federal transportation act requires regions to establish locally-developed, coordinated public transit-human services transportation plans in order to access three specific Federal Transit Administration (FTA) funding programs (see below). The planning effort is also being driven by current coordination successes gained both in the Chicago metropolitan region and nationally, as well as by policy statements from the Federal Interagency Coordinating Council on Access and Mobility that encourage more broad-based coordination of community transportation services that are funded by other Federal sources. Accordingly, the planning effort has two primary goals: 1) to meet the federal requirements associated with receiving FTA funding sections 5310, 5316 and 5317; and 2) to develop a regional resource that supports and encourages local coordination efforts. There are, therefore, three major projects associated with Connecting Communities through Coordination:

- A transportation needs assessment for persons with disabilities, older adults and persons with low incomes in the study area;
- A menu of locally appropriate coordination and mobility strategies to address the unmet needs of those three target populations; and
- A revamped process whereby project proposals requesting FTA Section 5316 and 5317 funding are elicited, evaluated, and (for those selected) funded.

Federal Planning Requirements and Policies
As mentioned above, SAFETEA-LU requires the preparation of coordination plans for entities that will access specific FTA funds. The three FTA funding programs include:

- **FTA Section 5310 – Transportation for Individuals who are Elderly and Individuals with Disabilities.** This program provides capital funding for private, non-profit entities (and if none, public entities) that are involved in transporting older adults and persons with disabilities.

- **FTA Section 5316 – Job Access and Reverse Commute Program (JARC).** This program provides funding for projects/services that improve access to transportation services to employment and related activities for welfare recipients and eligible low-income individuals and to transport residents of urbanized and non-urbanized areas to suburban employment opportunities.
- **FTA Section 5317 – New Freedom Program.** This program provides funding for projects/services that provide new public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act (ADA).

The stated goal of this requirement is to maximize these three programs’ coverage by minimizing the duplication of services. Components of the plan must include, at a minimum:

- an assessment that identifies public, private, and non-profit entities that currently provide transportation services to persons with disabilities, older adults, and people with low incomes, and the availability of those services;

- an assessment of transportation needs for persons with disabilities, older adults, and persons with low incomes, and gaps in service; this assessment may be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts;

- strategies and/or activities to address the identified gaps and achieve efficiencies in service delivery; and

- relative priorities for implementation based on resources, time, and feasibility for implementing specific strategies/activities identified.

SAFETEA-LU also stipulates that the coordination plan be developed through a process that includes representatives of public, private and non-profit transportation and human services providers, and participation by the public.

**Work Plan, Methodology, and Products**

The project work plan and research methodology followed the federal requirements. Initial efforts involved primary and secondary research tasks that included reviewing existing coordination efforts and plans, inventorying existing services, preparing a needs assessment and identifying redundant services and gaps in existing services. Data collection was followed by analytic tasks that involved identifying and recommending strategies to address redundant services and gaps in services, and developing recommendations for policies and strategies for future program years.

In the case of developing recommendations for future programmatic years, note that the SAFETEA-LU horizon reaches only through the FFY 2009; thus, the recommended process developed for this Plan extends only through September 2009. These recommendations also focus on just the JARC program and the New Freedom program, as Section 5310 is administered by the Illinois Department of Transportation (IDOT). As such, RTA has no direct role in the administration of this program; however, RTA has recommended to IDOT that as part of the process of considering Section 5310 funding requests from entities within the study area, that IDOT require or give more weight to applications that are consistent with strategies and needs identified in the Plan.

The project also involved a comprehensive public participation effort that was conducted in concert with the requirements of SAFETEA-LU. This effort included establishing and meeting with a Project Advisory Committee, interviewing stakeholder organizations throughout the region; conducting county-based workshops and themed focus groups; issuing periodic press releases; establishing a dedicated project website; and providing opportunities for comment on the final products. The Project Advisory Committee was composed of regional and local stakeholders.
representing the three target populations; the three service boards, planning organizations, and representation from all seven counties.

In addition to this Executive Summary and the draft final Plan, the interim supporting products of this project included the following:

- Task 2 Technical Memorandum: Overview of Community Transportation Coordination – Planning and Services (March 2007)
- Task 3 Technical Memorandum: Inventory of Available Services (May 2007)
- Task 4 Technical Memorandum: Trip Origins and Destinations (May 2007)
- Task 7/8 Technical Memorandum: Regional Policies and Strategies and Recommendations for Future Programmatic Years (June 2007)

All of these documents were used in the construct of this Plan. All of these documents, including the Executive Summary and the draft final Plan were reviewed by the Project Advisory Committee. Input from Project Advisory Committee members was used to revise the documents as needed. The revised documents were posted on the RTA’s project website for additional comment from the general public.

**Summary of Community Transportation Services**

There is a multitude of existing community transportation services available in the seven-county study area, ranging from large regional transit operators to small local providers. As part of this study, an inventory of existing services was developed using a combination of existing research and a web-based provider survey administered by the project team. These are summarized below. A table listing the region’s community transportation services (for which information was obtained) is available in the final Plan.

- **Regional Transportation Authority (RTA)** – The RTA provides financial oversight and regional planning – including coordination – for regional public transportation operators (“service boards”) in Northeastern Illinois: Chicago Transit Authority, Metra, and Pace.

- **Chicago Transit Authority (CTA)** – CTA operates buses as well as subways and elevated rapid transit primarily within the City of Chicago and forty surrounding suburbs. The CTA operates 1,190 rail cars over eight routes and 222.6 miles of track, and has approximately 2,100 buses that operate over 154 routes. All 154 bus routes are fully accessible to customers with disabilities. CTA has used JARC funding to implement new reverse commute bus routes and to extend hours on its Orange and Purple Lines.

- **Metra** – Metra is the commuter rail division of the RTA. It operates 11 fully-accessible rail lines that serve over 240 stations throughout the six-county area of Northeast Illinois. Metra has co-funded reverse commute shuttle services to/from suburban rail stations and established a reverse commute train to North Cook and Lake County using JARC funding.

- **Pace** – Pace is the suburban bus division of the RTA. Pace is responsible for (1) ADA paratransit services throughout the region, (2) the Taxi Access Program (TAP) in Chicago,
(3) co-funding Dial-a-ride services throughout the region – many of which are operated in a coordinated fashion by Pace operations contractors; and (4) vanpool programs – including the Advantage Vanpool program that provides vehicles to agencies providing services to persons with developmental disabilities. Pace also has been involved in JARC projects; this has included reverse commute bus routes and shuttles connecting suburban Metra stations with employment concentrations.

- **Illinois Department of Healthcare and Family Services (HFS)** – HFS is one of the largest providers of transportation in Illinois through administration of Medicaid (Title XIX) funding and in particular, non-emergency medical transportation (NEMT) services. HFS’ call center contractor, First Transit, operates the call center (for the entire state) in Lombard. First Transit staff estimates that there are approximately 500 transportation service providers in the study area, most of whom are private for-profit carriers.

- **Area Agencies on Aging** – Transportation for seniors is funded in part with Federal Title III-B funding which, in Illinois, is distributed by the Illinois Department of Aging to 13 Area Agencies on Aging (AAAs) around the state, three of which are in the study area: the Chicago Department of Aging, Suburban (Cook County) AAA, and Northeast Illinois AAA. The CDOA purchases a limited amount of service on Special Services and otherwise provides a senior shuttle service and a senior building transportation service. The other two AAAs provide funding to several township/municipality services and senior center transportation services, including dial-a-ride services, taxi subsidy services, and volunteer driver programs.

- **Township and Municipal Sponsored Services** – There are approximately 100 township and municipal sponsored community transportation services in the study area. These services primarily include a combination of dial-a-ride services and taxi subsidy programs.

- **Local Human Service Transportation Programs** – There is also a network of approximately 70 human service transportation programs in the study area that were identified as part of this study. Local human service transportation programs include organizations that fund or operate transportation services for clients and specific segments of the population.

### Coordination Activities and Challenges

Successful coordination efforts being pursued in each of the seven counties include:

- Regional, multi-agency coordination councils that meet regularly to discuss and address public transit and human service transportation issues.

- Pace co-sponsors and in several cases, operates (through a contractor) many township and municipal level dial-a-ride programs. In many cases, the management/operation of these dial-a-ride programs and ADA paratransit operations are coordinated.

- Groups of townships working together to provide sub-county regional services. Providing dial-a-ride service as a multi-jurisdiction entity effectively expands service coverage and increases the service area.

DuPage County has been at the forefront of coordination activity in the region, stemming back to activities in the mid 1990s. In addition to the above activities, the Ride DuPage program, weaving in human service agency and municipal trips, has been consolidated with the management/operation of ADA paratransit and dial-a-ride programs, while the Pilot II taxi subsidy
program provides additional cross-boundary mobility options for sponsored individuals. Ride-In-Kane, a new project partially sponsored with both New Freedom and JARC monies, is largely based on the successful experiences in DuPage County.

Among the many of the challenges facing organizations that sponsor/operate/coordinate community transportation services is the lack of sustainable long-term funding sources, especially as demand for service outstrips the supply of service. Such concerns frequently develop out of the most successful services that do the best job of addressing traveler needs and thus tend to stimulate demand for additional services. This appears to be a concern common to nearly all service providers, inclusive of township, municipal and human service organizations. The conundrum is that the more an organization relies on one local funding source, the more tenuous the service becomes if that funding disappears, is significantly reduced, or simply cannot be counted on from year to year. Thus, the identification of more stable and sustainable funding sources is high on the list of significant needs mentioned by most of these organizations.

Service Redundancies, Service Gaps, and Unmet Needs

With over 170 services and a study area population of 8.2 million, it is not surprising that service redundancies were identified in nearly every county in the study area. Our analysis suggests that redundant services are most likely to occur under the following circumstances:

- Transportation services oriented towards specific programs or populations that operate within the catchment area of a broader, more comprehensive service.
- Municipal and village sponsored transportation services that are provided in locations where township or regional dial-a-ride services already exist.
- Local community transportation services, including human service transportation programs and publicly sponsored dial-a-ride services, frequently overlap with ADA services for certain populations and during specific operating times.

Service gaps and unmet needs persist despite on-going efforts to improve the quality of community transportation services through innovative use of resources and equipment. Limitations on the way service is provided include:

- **Lack of centralized information** – At least two counties currently offer a central resource listing available transportation services; in both cases, transportation directories list services available within the sponsoring county only. The lack of centralized information outside of these areas means there is no single source for individuals seeking to find transportation options, eligibility requirements, fares and service hours, nor is there a regional directory providing information on transportation services available in the wider Chicago area.
- **Spatial limitations** – Limitations on community transportation operating areas were observed in every county in the study area. This means travelers face challenges crossing municipal, township or county boundaries to access regional service areas, especially employment centers. Limitations on community transportation services are especially significant in rural areas.
• **Temporal limitations** – Service hours on most public dial-a-ride services are limited to weekdays during normal business hours, typically between 9 a.m. and 5 p.m. These service hours do not effectively support employment and make it difficult for individuals seeking local connections to regional transportation infrastructure. Weekday hours also creates gaps for travelers during weekends.

• **Program eligibility and trip purpose restrictions** – Many of the existing dial-a-ride services, including ADA paratransit services, are available to subsets of the three target populations. As a result, some populations, especially individuals with low incomes, have limited access to the transportation resources. Other transportation programs are limited to taking people to/from medical appointments, or only to specific programs.

Unmet needs and gaps in services were also identified in association with service quality, issues of affordability and other miscellaneous issues. These gaps and unmet needs include:

- Demand for many community transportation services exceeds the supply and capacity of local providers making it difficult for users to schedule trips.
- Same-day service requests typically can not be accommodated, except through taxi subsidy programs.
- Limited ability to book subscription service makes it difficult for individuals traveling to regularly scheduled trips, such as employment.
- Concerns over the quality of service were voiced across the study area.
- The recent fare increases for Special Services and TAP have presented some affordability issues for some ADA paratransit customers and especially those who use these services regularly, if not daily.
- Subsidized taxi programs do provide opportunities for individuals to cross township and municipal borders, but high per trip costs to the traveler mean taxi programs are most appropriate for occasional travel.

**Strategies to Address Shortcomings**

We identified a series of coordination and mobility strategies that offer potential application to the study area. Our objective with these strategies is not to develop a regional or county-based coordinated service plan, but rather to enhance understanding of the opportunities and challenges associated with individual strategies that are relevant to the region.

The following text provides an overview of the relevant strategies identified as part of this study. We have grouped strategies based on likely implementation timeframe and type of strategy.
Shorter Term Strategies

We identified nine coordination strategies that could likely be implemented in a six to twelve month timeframe, once financial resources are awarded. These short term strategies are grouped by strategy type that share key implementation and funding characteristics. These shared attributes are briefly described and individual strategies presented.

- **Information and information technology.** Information and information technology offer potential to improve access to or enhance the delivery of existing services. The key challenges for implementation involve establishing support and buy-in from decision makers and partner organizations. Funding for these strategies will be available via most of the major FTA programs.
  - *Centralize information* – develop a single directory of transportation providers on the county and regional level.
  - *Utilize tools that improve productivity* – use new software to improve service productivity and cost efficiency.

- **Alternative mobility and service options.** These strategies tend to work best as part of a portfolio of mobility options. Including end users in service design and developing a comprehensive communication strategy will work to increase success. These options lend themselves to traditional funding sources as well as non-profit and for-profit partnerships.
  - *Establish/expand volunteer driver/escort programs* – expand service effectiveness by developing or expanding volunteer driver programs to handle trips that are more expensive to serve through more traditional means;
  - *Establish/expand taxi subsidy programs* – expand service through taxi programs where vouchers pay for all or part of a taxi ride;
  - *Introduce community bus routes* – increase travel options that do not require call-in reservations by creating short, fixed-route services for seniors and persons with disabilities that are tailored to their trip patterns;
  - *Introduce flexible transit services* – increase service coverage (and provide an alternative to paratransit) by allowing transit buses to deviate from base route to pick up or drop off passengers on request;
  - *Introduce agency/employment tripper services* – enhance mobility options by adding scheduled deviations to major trip generators such as job training locations, senior centers, or employment centers at key times;
  - *Expand reverse commute strategies* – improve access to suburban employment centers from urban and rural locations.

- **Financing strategies.** One financing strategy is included in the list of potential short term coordination strategies.
  - *Accelerate reimbursement* – provide a perpetual “bridge loan” to solve prospective cash flow problems for community transportation operators as an incentive to become Medicaid non-emergency medical transportation carriers.
Longer Term Strategies

We identified ten coordination strategies that would likely require twelve months or more to implement. Similar with the short term strategies, key issues shared across strategy groups are discussed, followed by a synopsis of the individual strategies.

- **Contracting and consolidation.** Contracting and consolidation strategies work to create cost-efficiencies by sharing resources and administration and increasing purchasing power. Generally speaking, they require a longer implementation timeframe because of the time associated with changing business practices and developing agreement and contractual terms across independent agencies. In most cases funding is available through the larger federal programs.
  - *Joint purchasing* – orchestrate group purchase of capital equipment and services, such as vehicle maintenance, driver training, drug and alcohol testing or insurance;
  - *Share resources* – share capital and operational resources, such as vehicles, vehicle maintenance functions, storage and support functions;
  - *Contract with agency operators* – purchase service from community transportation operators with excess capacity;
  - *Contract with common providers* – allow a single transportation provider to co-mingle sponsored trips with other trips from other contracts;
  - *Consolidate functions* – merge call center functions and possibly some service delivery functions under one entity.

- **Service improvements.** Strategies to improve service convenience can have a profound impact on customer mobility. The most significant implementation challenges associated with any service improvements are funding and commitment. Service improvement projects are challenged because they require on-going funding sources and most federal programs fund operating expenses at 50%, meaning local sources must sponsor the remaining 50% of service costs. Some non-FTA sources include federal programs outside of the Department of Transportation, community foundations and member cooperatives.
  - *Improve service convenience* – enhance access and mobility by increasing and expanding existing services, including spatial and temporal service, same-day service and increased driver assistance.

- **Strategies that improve physical access.** Strategies associated with improving the accessibility involved in making accessibility improvements to transit and inter-modal stations that permit a wider spectrum of the population to physically access these locations. Implementation challenges are associated with making sure the project is designed, funded and executed effectively and efficiently. Making accessibility improvements is considered to meet the eligibility for New Freedom funds, so long as the projects are clearly intended to remove barriers that would otherwise have remained. In addition, several of the major FTA programs permit accessibility improvements.
  - *Improve access to non-key rail stations* – improve access to regional infrastructure by making non-key rail stations accessible to persons with disabilities;
  - *Improve access to fixed-route bus stops* – improve accessibility to existing fixed-route bus services by making safety and access improvements to fixed-route bus stops.
• **Information technology.** Technological tools that aim to support and enhance public transit and human service transportation develop alongside new coordination strategies. The most significant obstacle associated with implementing new technology, especially in cases where technology is under development, is training staff to operate and manage the systems and integrating new systems with older technologies. Hardware and software that support coordination strategies are eligible for capital funding under the New Freedom program.

  - *Utilize tools that improve data integrity* – technological improvements that enhance fare collection, reporting, billing, cost allocation and sharing.
  
  - *Utilize tools that support live dispatch* – software systems that offer dynamic trip scheduling and routing.

### Federal and Regional Goals

The development of the Plan stems from several goals. Some of these goals are derived from federal regulations and policies; these include the following:

- To ensure an uninterrupted flow and appropriate level of JARC and New Freedom program funding to the region by ensuring that the Plan fully complies with the SAFTEA-LU regulations and with the spirit and intent of the JARC and New Freedom programs.

- To establish a framework by which proposed projects requesting JARC and/or New Freedom program funding can be elicited, evaluated and (within the constraints of the funding available for the region) funded through a competitive selection process that is fair and equitable, well-advertised, and inclusive.

  - However, the FTA specifically notes that “equitable distribution” refers to “equal access to, and equal treatment by, a fair and open competitive process” and that the result of such a process “may not be an ‘equal’ allocation of resources among projects or communities”. FTA guidance also states that it is possible that some areas may not receive any funding at the conclusion of the competitive selection process.

- To ensure that all components of the Plan have benefited from a comprehensive public involvement effort that has effectively reached out to public, private, and non-profit transportation providers, human services providers and other stakeholders representing persons with disabilities, older adults, and persons with low income, and the general public.

- To craft a plan that will encourage not only coordination among services supported by JARC and/or New Freedom program funding, but also coordination among the broad array of community transportation services in the seven-county region.

- To ensure that the process for adopting the plan includes the endorsement of the Project Advisory Committee.

Additional goals and objectives were derived from public input and especially from the Project Advisory Committee. These included the following:

- To ensure that proposed projects specifically address unmet needs identified in the HSTP.

- To ensure that project applications identify a local “hard” match.
To ensure that proposals for new projects vs. continuation or expansion of existing projects (that have been successful or have made progress) be given equal weight.

To give more weight to projects which address more severe needs.

To give more weight to projects that are regional in scope or otherwise involve multiple counties or jurisdictions.

To give more weight to projects which are based on strategies identified in the HSTP.

To give more weight to projects that reduce/minimize duplication of existing services and to projects that utilize or improve access to existing transportation services.

To give more weight to projects which coordinate with existing public and private human service agency transportation providers or reflect partnerships with non-transit entities and/or private for-profit or non-profit carriers.

To give more weight to projects that can be implemented quickly (thereby maximizing use of funding).

To give more weight to projects which are sustainable after JARC/New Freedom funding is depleted, e.g., where local funding source(s) have committed funding for a longer term.

To give more weight to projects that demonstrate cost efficiency in terms of unit cost of service output, of service consumed, and/or a unit cost reduction of service consumed.

To give more weight to projects that will increase economic opportunities for individuals with disabilities and persons with low income.

Project Selection Process and Criteria

As the agency designated to receive JARC and New Freedom funding for the region, the RTA is required to:

- conduct an area-wide competitive selection process;
- certify a fair and equitable distribution of funds resulting from the competitive selection process¹;
- certify that the Program of Projects selected was derived from a locally developed, coordinated public transit-human services transportation plan;
- certify that local plans are developed through a process that included representatives of public, private, and non-profit transportation and human services providers and participation by the public;
- manage all aspects of grant distribution and oversight for sub-recipients receiving funds under this program; and
- submit reports as required by FTA.

¹ FTA notes that equitable distribution refers to equal access to, and equal treatment by, a fair and open competitive process. The result of such a process may not be an ‘equal’ allocation of resources among projects or communities. It is possible that some areas may not receive any funding at the conclusion of the competitive selection process. This means that in any year, there will not be a pre-allocation of funds earmarked for each county and/or for each or any service board. Indeed, the only amount of funds that may be earmarked would be for a selected multi-year project from a preceding year.
With these responsibilities and the above objectives in mind, a schedule for the federal fiscal years 2007-2009 was developed, noting that funding for federal fiscal year (FFY) 2007 must be obligated to a specific project within the year of apportionment plus two additional years. Therefore, FFY 2007 funds must be obligated by September 2009. In summary, the selection process improves upon the existing process in a number of key ways:

- It provides more information to prospective applicants; this includes goals, eligible projects, and activities, eligible applicants, selection criteria, timetables, description of the selection committee, available funding, local match guidelines, the performance monitoring program, and answers to other frequently asked questions.
- The RTA will issue a Call for Projects, utilizing a database of over 3,500 organizations that was compiled as part of this project, and will hold a pre-application seminar open house.
- The selection process will utilize evaluation criteria that was developed as a part of this project and that reflected the federal/regional goals stated above and reflected input from the Project Advisory Committee.
- The RTA will invite each unsuccessful applicant to a separate debriefing session designed to assist the applicant in understanding why a particular project was not chosen and to gain insights from the applicant on how the process may be improved.
- The Selection Committee, in concert with the CMAP Human Services Committee, will review the Selection Criteria after each round of selections to identify any areas that need clarification or revisions for the following year’s program. Members of the Project Advisory Committee will be invited to attend and offer input.

The evaluation criteria was developed based on the federal requirements and on the goals set forth above and further refined based on input from the Project Advisory Committee. These proposed criteria will be used in ranking project applications for projects applying for JARC (FTA Section 5316) funding, and/or New Freedom (FTA Section 5317) funding. These criteria, however, are subject to further review and refinement to assure consistency with the Program Management Plan (PMP) and the RTA JARC/New Freedom Application that were under development at the time this plan was finalized. The final version of the PMP, criteria, and application will be made available to prospective applicants and posted to the RTA’s website.

The evaluation criteria will be split into 5 sections addressing pre-requisites that must be met, criteria that apply to both JARC and New Freedom projects, criteria that apply to JARC projects only, criteria that apply to New Freedom projects only, and bonus criteria.
Chapter 1. Introduction

1.1 Project Summary

The Regional Transportation Authority (RTA) conducted a planning effort to identify and recommend regional and local strategies that encourage the most effective use of available community transportation services to enhance mobility for the region’s older adults, persons with disabilities and persons with low incomes. This planning effort is known as Connecting Communities through Coordination. The scope of the project covered the seven counties of Cook, DuPage, Lake, Kane, Kendall, McHenry, and Will (See Figure 1-1), and builds upon the existing coordination plans in the region that have been developed, or are in the process of being developed.

In part, Connecting Communities through Coordination is driven by the Safe, Accountable, Flexible, Efficient Transportation Equity Act – A Legacy for Users (SAFETEA-LU), the federal transportation act that requires regions to establish locally-developed, coordinated public transit-human services transportation plans in order to access three specific Federal Transit Administration (FTA) funding programs. The planning effort is also being driven by current coordination successes gained both in the Chicago metropolitan region and nationally.

Accordingly, the planning effort has two primary goals: 1) to meet the federal requirements associated with receiving FTA funding sections 5310, 5316 and 5317; and 2) to develop a regional resource that supports and encourages local coordination efforts. There are, therefore, three major products associated with Connecting Communities through Coordination:

- A transportation needs assessment for the three target populations, namely persons with disabilities, older adults and persons with low incomes;
- A menu of locally appropriate coordination strategies; and
- A revamped process for regional organizations applying for the three targeted FTA funding sources.

This planning effort included extensive public involvement. In addition to creating a Project Advisory Committee (reflective of both the geographic and target communities), the public involvement program included stakeholder interviews, workshops, focus groups, press releases, and a dedicated website that provides information about the study and elicits feedback from the general public. A synopsis of the public involvement efforts is available in Appendix A.

1.2 Federal Planning Requirements and Policies: SAFTEA-LU

The federal transportation bill known as SAFTEA-LU, passed in 2005, requires the preparation of coordination plans for entities that will access FTA funds. SAFTEA-LU states that projects funded from the following three programs must be derived from a locally developed, coordinated public transit-human service transportation plan. The stated goal is to maximize the three programs’ coverage by minimizing the duplication of similar, overlapping services. SAFTEA-LU also stipulates that the plan be developed through a process that includes representatives of public,
private and non-profit transportation and human services providers, and participation by the public. The three FTA funding programs include:

1. **FTA Section 5310 – Transportation for Individuals who are Elderly and Individuals with Disabilities.** This program provides formula funding to states for capital projects to assist in meeting the transportation needs of the elderly and persons with disabilities. This funding, available to public entities and private, non-profit entities involved in transporting seniors and persons with disabilities, has historically been used for capital expenditures, typically for accessible vehicles. Approximately $3.7 million was allocated to the seven-county region in calendar year 2006. The grants were awarded to 55 organizations and provided 47 vehicles.²

2. **FTA Section 5316 – Job Access and Reverse Commute Program (JARC).** The JARC program provides formula funding for projects that assist individuals with low incomes and other individuals with transportation services to access jobs and employment-related activities. A list of projects eligible for JARC funding is provided in Appendix C.

3. **FTA Section 5317 – New Freedom Program.** The New Freedom Program (NF) provides formula funding for new public transportation services and service alternatives beyond those required by the Americans with Disabilities Act (ADA). The New Freedom program aims to provide additional tools for persons with disabilities seeking to overcome existing barriers integrating into the work force and participating fully in society. A list of eligible projects under the New Freedom Program is shown in Appendix C.

Proposed guidelines in the September 6, 2006 FTA circulars for the Sections 5316 and 5317 programs define a coordination plan as one that must include, at a minimum:

- an assessment that identifies public, private, and non-profit entities that currently provide transportation services to persons with disabilities, older adults, and people with low incomes, and the availability of those services;

- an assessment of transportation needs for persons with disabilities, older adults, and persons with low incomes, and gaps in service; this assessment may be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts;

- strategies and/or activities to address the identified gaps and achieve efficiencies in service delivery; and

- relative priorities for implementation based on resources, time, and feasibility for implementing specific strategies/activities identified.

² IDOT, CY06/2004 CVP Application Awards Program.
1.3 Project Coordination

The consulting team coordinated with staff from IDOT, which is developing a similar process for eliciting and evaluating applications for Section 5316 and 5317 grants from downstate applicants. Also, while IDOT continues to be responsible for 5310 grant applications, it was logical to ensure that IDOT checks to make sure that 5310 grant applications from the seven-county Northeast Illinois region are in concert with established regional/local coordination plans and strategies. The consulting team also coordinated with the state-level Inter-agency Coordinating Committee on Transportation (ICCT).

1.4 Project Work Plan and Study Methodology

The project work plan and research methodology was composed of the following steps:

Task 1: Develop Detailed Work Scope and Schedule.

Task 2: Review Coordination Plans in the Region – The study team reviewed existing coordination plans and conducted interviews with regional public transit agencies and planning organizations, human service agency organizations, and counties/municipalities.

Task 3: Inventory Available Services – This task involved developing an inventory of community transportation services. Sources included inventories from past/current planning efforts, other inventories, and a web-based survey.

Task 4: Conduct Transportation Needs Assessment – The transportation needs of persons with disabilities, older adults, and persons with limited incomes were identified by examining census data, Pace trip data, survey results, stakeholder interviews and data from Workforce Investment Boards.

Task 5: Identify Redundant Services and Gaps in Service – Using results from Tasks 2 through 4, together with input collected from the county workshops, redundant services and gaps in services were identified.

Task 6: Identify and Recommend Strategies to Address Redundant Services and Gaps in Service – This task involved identifying potential “best practice” coordination strategies appropriate to the region.

Task 7: Develop Recommendations for Policies and Strategies – The study team identified and documented policies and strategies with potential to eliminate or reduce the duplication of services, fill service gaps, and provide more efficient community transportation services and resources.

Task 8: Develop Recommendations for Future Program Years – The study team recommended program goals and guidelines for the distribution of Section 5310, 5316, and 5317 funding in the seven-county region, as well as guidelines for the oversight of services that receive this funding.

Task 9: Prepare Executive Summary and Draft Final and Final Reports
Task 10: Conduct Public Participation Plan – Throughout the project, a comprehensive public participation effort was conducted, including:

- establishing and meeting with a Project Advisory Committee;
- interviewing stakeholder organizations throughout the region;
- conducting county-based workshops and themed focus groups;
- issuing periodic press releases;
- establishing a dedicated project website; and
- providing opportunities for comment on the final products.

1.5 Organization of Draft Final Plan

This Draft Final Plan is organized as follows:

- **Chapter 1: Introduction to the Study** – This chapter provides a summary of the project, project goals and relevant federal policies. It also includes the project work plan.

- **Chapter 2: Overview of Study Area, Available Services and Needs Assessment** – This chapter includes an overview of the regional transportation services, coordination efforts and existing service redundancies, needs, and gaps.

- **Chapter 3: Strategies to Address Service Redundancies, Service Gaps, and Unmet Needs** – This chapter presents relevant coordination and mobility strategies that offer regional potential to address identified needs and gaps in existing services.

- **Chapter 4: Priorities for Implementation** – This chapter presents an overview of Section 5316 and 5317; the regional Section 5316 experience to date; and program goals and guidelines for the distribution of Section 5316 and 5317 funding.

The draft final Plan also includes three appendices, submitted under a separate cover:

- **Appendix A:** Provides a synopsis of the public involvement effort.
- **Appendix B:** Includes an overview of existing community transportation services area.
- **Appendix C:** Includes a list of eligible projects under FTA Section 5316 and 5317 funding programs.
Chapter 2. Overview of Study Area, Available Services and Needs Assessment

2.1 Overview of Study Area

The geographic scope of this project contains the Regional Transportation Authority service area which is comprised of the six counties of Cook, DuPage, Kane, Lake, McHenry, and Will, plus Kendall County which is outside of the RTA service area but in the catchment area of Chicago Metropolitan Agency for Planning. There are currently more than 8.1 million people living in the seven-county study area. Approximately 16% are persons with disabilities, 11% are aged 65 and above and 24% are individuals with low income. This information is shown for each county and for the study area in Figure 2-1. As shown, with the exception of Cook County, the proportion of persons with disabilities and older adults is relatively consistent across the suburban counties. Individuals with low income represent a larger portion of the total population of Cook County as well as Kane and Lake Counties, but are roughly 10-15% in the other suburban counties.

Figure 2-1 Total Population and Proportion of Target Populations

<table>
<thead>
<tr>
<th>County</th>
<th>Total Population</th>
<th>Percent of Population</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>With Disabilities</td>
</tr>
<tr>
<td>Cook</td>
<td>4,942,123</td>
<td>19.7</td>
</tr>
<tr>
<td>DuPage</td>
<td>904,161</td>
<td>12.2</td>
</tr>
<tr>
<td>Kane</td>
<td>364,135</td>
<td>15.3</td>
</tr>
<tr>
<td>Kendall</td>
<td>50,006</td>
<td>12.2</td>
</tr>
<tr>
<td>Lake</td>
<td>573,127</td>
<td>13.4</td>
</tr>
<tr>
<td>McHenry</td>
<td>237,897</td>
<td>11.4</td>
</tr>
<tr>
<td>Will</td>
<td>452,931</td>
<td>12.8</td>
</tr>
<tr>
<td>Summary</td>
<td>8,146,975</td>
<td>15.9</td>
</tr>
</tbody>
</table>

Source: US 2000 Census

Year 2000 populations for persons with disabilities and older adults are shown in Figure 2-2 together with a 10-year forecast growth based on data prepared by CMAP. This data shows that the population of persons with disabilities and older adults will greatly increase in several counties. Populations in Kane, McHenry and Will counties, for example, are forecast to increase between 21 and 37%, while the population of persons with disabilities and older adults in Kendall County is anticipated to nearly double.
Figure 2-2  2000 Population and 10-Year Forecasted Growth by Target Populations

<table>
<thead>
<tr>
<th></th>
<th>Persons with Disabilities</th>
<th></th>
<th>Older Adults</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook</td>
<td>1,383,295</td>
<td>5.0%</td>
<td>603,891</td>
<td>3.9%</td>
</tr>
<tr>
<td>DuPage</td>
<td>174,604</td>
<td>3.5%</td>
<td>81,312</td>
<td>3.2%</td>
</tr>
<tr>
<td>Kane</td>
<td>90,926</td>
<td>21.0%</td>
<td>31,683</td>
<td>27.5%</td>
</tr>
<tr>
<td>Kendall</td>
<td>10,725</td>
<td>89.1%</td>
<td>4,455</td>
<td>91.1%</td>
</tr>
<tr>
<td>Lake</td>
<td>133,759</td>
<td>10.5%</td>
<td>51,836</td>
<td>13.0%</td>
</tr>
<tr>
<td>McHenry</td>
<td>51,076</td>
<td>25.1%</td>
<td>9,935</td>
<td>26.4%</td>
</tr>
<tr>
<td>Will</td>
<td>103,032</td>
<td>36.3%</td>
<td>39,219</td>
<td>36.8%</td>
</tr>
<tr>
<td>Total</td>
<td>1,947,417</td>
<td>8.7%</td>
<td>832,331</td>
<td>7.9%</td>
</tr>
</tbody>
</table>

Source: CMAP

2.2 Assessment of Available Services

The seven-county study area contains a multitude of transportation services, ranging from large regional transit operators to small local providers. As part of Task 3 for this study, the study team developed an inventory of existing services using a combination of tools including a web-based provider survey. A summary table listing all community transportation services in the seven-county region is provided in Appendix B. This section provides an overview of the largest regional transportation organizations that fund and operate community transportation services, as well as a brief summary of the smaller, local providers.

Regional Transportation Organizations and Service Providers

Regional Transportation Authority (RTA)

The RTA provides financial oversight and regional planning—including coordination—for regional public transportation operators (“service boards”) in Northeastern Illinois: Chicago Transit Authority (CTA), Metra, and Pace. As the transportation funding body for the region, the RTA has also been involved in overseeing the ADA paratransit services in the region, which currently is comprised of two services, “Special Services” in the CTA service area and “Pace ADA Paratransit” in the Pace service area. (These services are both described in detail later in this chapter.) Since 1993, the RTA has also directly provided the ADA rider eligibility certification function for the region. In conjunction with this role, the RTA purchases paratransit trips from Pace for ADA paratransit applicants.
Overview of the CTA\textsuperscript{3}

The Chicago Transit Authority (CTA) is the operator of buses as well as subways and elevated rapid transit primarily within the City of Chicago and forty surrounding suburbs. On an average weekday, nearly 1.6 million rides are taken on CTA, providing 81\% of the public transit trips in the six-county region. The CTA operates 1,190 rail cars over eight routes and 222.6 miles of track, and has approximately 2,100 buses that operate over 154 routes and 2,529 route miles. All 154 bus routes are fully accessible to customers with disabilities. Lifts and ramps on all buses are available for use upon request by anyone who has trouble with steps, even temporarily. The catchment of people living or working within \( \frac{3}{4} \) of a mile of a bus stop is approximately 3.5 million.

From 1981 through June 2006, the CTA also operated paratransit services, including Special Services, a shared-ride, door-to-door service, and the Taxi Access Program (TAP), a taxi subsidy program available to Special Services customers. Beginning in 1992, Special Services served as the CTA’s response to its ADA complementary paratransit obligation. For most of these years, Special Services was provided through turn-key contracts with three private carriers (Cook-DuPage Transportation, SCR Transportation, and Art’s Transportation). Per House Bill 1663, passed in July 2005, Pace took over the responsibility for Special Services and TAP, and hence assumed these Special Services contracts on July 1, 2006.

Overview of Metra\textsuperscript{4}

Metra is the commuter rail division of the Regional Transportation Authority. Metra operates 11 fully accessible rail lines that serve over 240 stations throughout the six-country area of Northeast Illinois. In 2006, Metra’s system served over 84.3 million passenger trips. Metra serves approximately 310,000 weekday passengers on 735 revenue trains. On weekends, approximately 106,000 passengers travel on 435 revenue trains. Ridership was up in 2006 by 5.2\% over 2005 levels.

Overview of Pace\textsuperscript{5}

Pace, the suburban bus division of the RTA, provides fixed-route bus service, express bus service, dial-a-ride paratransit services and vanpool/subscription bus service throughout the RTA region outside of the CTA service area. Pace serves an area of 3,518 square miles with 5.2 million residents, encompassing a wide range of demographic groups, activity centers, and travel and development patterns. Since July 1, 2006, it also assumed the responsibility for ADA paratransit service throughout the RTA region (in adding Special Services to the ADA paratransit services it was already providing outside the CTA service area) as well as the Taxi Access Program.

\textsuperscript{3} Source information used for this Overview section included: RTA Regional ADA Paratransit Plan for Persons with Disabilities, CTA website \url{www.transitchicago.com}, CTA Bus & Rail Map, June 2006, and CTA JARC applications for 2006.


\textsuperscript{5} Sources: RTA Regional ADA Paratransit Plan for Persons with Disabilities, January 2006; Pace Profile 2007, \url{www.pacebus.com}; Pace 2020-Blueprint for the Future; DuPage Area Transit Plan 2020, Oct. 2002; and Pace JARC applications.
Pace’s Paratransit operations now include five components:

- **ADA Paratransit Services in the Pace Service Area** – In 2005, Pace provided 458,774 ADA paratransit trips. Pace’s ADA paratransit operations in the Pace service area may best be described as a decentralized operations model of eight service areas, each with its own contractor. There are three carriers that serve the eight service areas: Laidlaw has 4 contracts; MV Transportation has three contracts; and Veolia Transportation (formerly ATC) has one contract.

- **Non-ADA Paratransit Services in the Pace Service Area** – Pace’s dial-a-ride services consist of 62 programs that provide curb-to-curb, next-day service to general public residents of some communities and senior and disabled residents of others. These dial-a-ride programs are provided in 79 of the 114 townships in Pace’s service area. For some communities, dial-a-ride service is the only form of public transportation available and is typically open to the general public. In other communities, dial-a-ride service was developed as a supplement to fixed-route and ADA services, and is limited to senior citizens and persons who have disabilities. Dial-a-ride projects are funded jointly by Pace and local villages, townships, and in the case of Ride DuPage, human service agencies.

- **Pace’s Vanpool Services** – Pace’s Vanpool program is comprised of four different programs, with the Advantage Program most relevant to this study. The Advantage Program provides a transit alternative to persons with disabilities that commute on a regular basis to work sites or rehabilitative workshops. This program not only provides service to persons who might otherwise request ADA paratransit service from Pace, it also is an alternative for those people living outside the ¾ mile ADA paratransit service area.

- **ADA Paratransit Services in the CTA Service Area (Special Services)** -The Special Services program began in 1981. As discussed, this paratransit service was initially operated in-house by the CTA. With the advent of the ADA in 1990, Special Services became the CTA’s ADA complementary paratransit service. Hence, Special Services is provided where and when CTA’s fixed-route (mainline) bus and rail services are provided to persons who, because of their disability, are unable to use or access bus and rail services. On July 1, 2006, responsibility for Special Services (and the Taxi Access Program) was transitioned to Pace.

- **Taxi Access Program (TAP)** – Pace, in cooperation with the City of Chicago, provides two taxi subsidy programs which allow certified ADA paratransit-eligible persons to travel in taxis at reduced rates for trips that originate in the City of Chicago. The two programs are called the Taxi Access Program (or TAP) and Mobility Direct.

### Overview of State & Regional Human Service Transportation

**Department of Healthcare and Family Services (HFS)**

The Department of Healthcare and Family Services (HFS) is one of the largest providers of transportation in Illinois. Included in its responsibilities is Medicaid (Title XIX) funding and in particular, non-emergency medical transportation (NEMT) services. In June 2001, HFS implemented the Non-Emergency Transportation Service Prior Approval Program (NETSPAP) in Cook County; on May 1, 2004, NETSPAP became a statewide program. The focus of NETSPAP is to assure that participants who are eligible for transportation receive the appropriate level of services.

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6 Source: RTA ADA Paratransit Plan, Technical Memorandum #1.
transportation services to necessary medical care, that there is a uniform application of transportation policies, and that payment is made only for medically necessary transportation. First Transit is currently under contract to manage NETSPAP and staffs a call center located in Lombard. In 2004, HFS estimated that 85,000 Medicaid recipients received NEMT and that 3 million one-way passenger trips were provided statewide at an average cost of $19 per trip.7

**Area Agencies on Aging**8

Transportation for seniors is funded in part with Federal Title IIIB funding which, in Illinois, is distributed by the Illinois Department of Aging to 13 Area Agencies on Aging (AAAs) around the state. Each AAA is responsible for delivery of services to seniors in its area, including transportation. Each AAA develops an Area Plan which details these services, noting that each Area Plan must be approved by the Illinois Department of Aging. Each AAA makes the decisions about what to fund and how to deliver the services. Federal Title IIIB funding requires a local match. In Illinois, this local match is provided partially by the state at about 5%, which is used for both administration match (at 65%) and service match (at 35%). The greater portion of the local match that is required to deliver services is generated by local communities. By statute, rider donations can not be used as part of the local match; instead, they are to be used for service expansion. In the seven-county region, there are three AAAs:

- Chicago Department of Aging (City of Chicago) – CDOA has four transportation programs listed on its website, but only one, Emergency Medical Transportation Services, is funded with Title IIIB funds.
- Suburban AAA (suburban Cook County) – The Suburban AAA provides Title IIIB funds to ten transportation programs in 2006. Organizations receiving transportation funding include local units of government, senior centers, and human service agencies.
- Northeastern Illinois AAA (DuPage, Lake, Kane, Kendall, McHenry and Will Counties) – NIAAA funds senior transportation through human service agencies, Case Coordination Units and local units of government.

**Township and Municipal Sponsored Services**

There are slightly more than 100 township and municipal sponsored community transportation services in the study area. These services include a combination of community bus service, dial-a-ride services, and taxi subsidy programs. Most services are limited to township or municipal boundaries, with exceptions allowed to regional medical facilities. There are, however, several sub-regional services where groups of townships are collaborating to provide dial-a-ride services for larger service areas. Some services are available to members of the general public with others available to targeted segments of the population, typically persons with disabilities and older adults.

In many cases, dial-a-ride services are provided jointly by local governments and Pace and administered as part of Pace’s existing contracts with service providers. The level of Pace subsidy to townships and municipalities varies by region; each contract was negotiated independently at

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8 Source: Interviews with CDOA, Suburban AAA, and NIAAA staff.
different times. A general overview of the number of township and municipal sponsored community transportation services available by county and by type are listed in Figure 2-3.

**Figure 2-3 Township and Municipal Sponsored Community Transportation Resources**

<table>
<thead>
<tr>
<th></th>
<th>Dial-A-Ride Programs</th>
<th>ADA Paratransit Service Contracts</th>
<th>Taxi Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook</td>
<td>26</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>DuPage</td>
<td>15*</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>Kane</td>
<td>8</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Kendall</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Lake</td>
<td>14</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>McHenry</td>
<td>9</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Will</td>
<td>6</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>78</td>
<td>10</td>
<td>24</td>
</tr>
</tbody>
</table>

Source: Nelson/Nygaard Consulting Associates; See Appendix B for full details
* Includes Ride DuPage

**Local Human Service Transportation Programs**

There is also a network of approximately 80 human service transportation programs in the study area, including organizations that fund or operate transportation services for clients and specific segments of the population. The majority of these services provide transportation to/from medical facilities and specific programs and services, including employment and job-related activities. A listing of human service organization community transportation services is provided in Figure 2-4.

**Figure 2-4 Human Service Organization Sponsored Community Transportation Resources**

<table>
<thead>
<tr>
<th></th>
<th>Human Service Sponsored Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook</td>
<td>36</td>
</tr>
<tr>
<td>DuPage</td>
<td>7</td>
</tr>
<tr>
<td>Kane</td>
<td>2</td>
</tr>
<tr>
<td>Kendall</td>
<td>0</td>
</tr>
<tr>
<td>Lake</td>
<td>8</td>
</tr>
<tr>
<td>McHenry</td>
<td>11</td>
</tr>
<tr>
<td>Will</td>
<td>4</td>
</tr>
<tr>
<td>Regional</td>
<td>14</td>
</tr>
<tr>
<td>Total</td>
<td>82</td>
</tr>
</tbody>
</table>

Source: Nelson/Nygaard Consulting Associates
See Appendix B for full details

**On-going Coordination Activities**

Successful coordination efforts are currently being pursued in each of the seven counties. Regional successes that have been achieved with some level of consistency across the study area include:
Several counties have regional, multi-agency coordination councils that meet regularly to discuss and address public transit and human service transportation issues. Counties that have demonstrated support for coordination and that have on-going coordination committees devoted to addressing these issues typically had more, and more diverse, community transportation services.

Pace co-sponsors and in several cases, operates (through a contractor) many township and municipal level dial-a-ride programs. Combining operations contracts under a single contract is an effective coordination strategy that works to improve operational efficiency and lower program costs.

Most of the counties have examples where groups of townships are working together to provide sub-county regional services. Providing dial-a-ride service as a multi-jurisdiction entity effectively expands service coverage and increases the service area.

Organizations involved in some of the successful on-going coordination efforts expressed a concern over the need for a sustainable, long-term funding source to support their local and regional success stories. Such concerns frequently develop out of the most successful services that do the best job of addressing traveler needs and concerns and thus tend to stimulate demand for additional services.

2.3 Assessment of Needs and Gaps

Service redundancies were identified in nearly every county in the study area. In most cases, service redundancies were identified as examples of multiple services available for one or more population sub-groups and at specific times of day, locations and trip types. Our analysis suggests that redundant services are most likely to occur under the following circumstances:

- Transportation services are oriented towards specific programs or services. For example, in areas where public parks and recreation agencies have vehicles to shuttle program participants from their homes to the program site, such transportation services were frequently redundant with township and/or municipality sponsored dial-a-ride services. Similar cases were also identified among human service agency transportation programs. While the motivation for offering reliable transportation is to meet specific program needs, such services nevertheless frequently overlap with other transportation programs.

- Municipal and village sponsored transportation services are frequently provided in locations where township or regional dial-a-ride services already exist. In many cases, redundant municipal services resulted from the geographic conundrum created by a situation where a single municipality, located within parts of four townships, each of which may offer service only within their individual township boundaries, may mean an individual can not easily travel within municipal borders. Such fragmented service delivery, however, creates a situation requiring multiple, often redundant services.

- In many cases, local community transportation services, including human service transportation programs and publicly sponsored dial-a-ride services overlap with ADA services. Such overlaps typically occur for certain individuals, along specific routes and during specific times of the day.
Service Limitations, Gaps, and Unmet Needs

Service limitations, gaps and unmet needs were identified in each of the seven counties that comprise the study area. Service gaps and unmet needs persist despite on-going efforts to improve the quality of community transportation services through innovative use of resources and equipment.

Centralized Information

At least two counties currently offer a central resource listing available transportation services; in both cases transportation directories list services available within the sponsoring county only. The lack of centralized information outside of these areas means there is no single source for individuals seeking to find transportation options, eligibility requirements, fares and service hours, nor is there a region-wide directory providing information on available community transportation services.

Ideally, resource directories should be developed for each county individually as well as compiled into a regional directory. Resource guides should be updated annually and available in hard copy at several locations, on-line, in multiple formats and languages and potentially incorporate interactive trip making/scheduling options.

Spatial Limitations

Spatial limitations in community transportation were observed in every county in the study area. In most cases the limitations resulted in similar types of service gaps:

- Township and municipal sponsored dial-a-ride services are typically limited to the sponsoring jurisdictions’ boundaries, with some exceptions allowed, typically for medical facilities. Limiting travel to township or municipal borders, even in cases where services are provided by groups of townships and municipalities, makes it difficult for some travelers to access educational, medical, service, shopping and employment centers outside of their dial-a-ride service area.

- Community transportation services are especially limited in rural areas. Recognizing that serving rural areas with population densities often results in low productivity and high per trip costs, there are unmet needs for individuals living in these areas seeking travel to/from local and regional service areas.

- Many areas provide subsidized taxi programs, which do provide opportunities for persons with disabilities, older adults and sometimes individuals with low incomes to cross township and municipal borders. Such services, however, are most appropriate for occasional travel. High per trip costs to the traveler, even with the subsidy, mean taxi services typically can not support daily employment trips.

Temporal Limitations

Service hours on most public dial-a-ride services are limited to weekdays during normal business hours, typically between 9 a.m. and 5 p.m. Across the study area, temporal limitations create service gaps for travelers:
A lack of weekend service – Dial-a-ride services are generally not available, or are much more limited, on weekends. While some ADA paratransit services and human service transportation is provided, these services are typically not available to all members of the target populations.

Service hours are not typically structured to effectively support employment. Many employment opportunities, particularly for persons with low incomes, require that transportation be available before 9 a.m., after 6 p.m., and on weekends.

Service hours that start at 9 a.m. and end at 5 p.m. also make it difficult for individuals who are seeking local connections to regional transportation infrastructure such as Pace and Metra in order to access regional services, find employment or attend job training services in neighboring counties or in downtown Chicago.

Program Eligibility and Trip Purpose Limitations

Program eligibility and trip purpose limitations also result in gaps and unmet needs in existing services. For example:

- Many of the existing dial-a-ride services are available to subsets of the three target populations. As a result, some populations, especially individuals with low incomes, have limited access to the transportation resources.
- ADA paratransit services are only available to ADA certified customers. Human service transportation programs are likewise available to program clients only.
- Several transportation programs are limited to taking people to/from medical appointments. Recognizing that medical trips are essential, an unmet need voiced across the study area is a lack of opportunities for people to make quality of life trips to go shopping, conduct personal errands or visit friends and families.

Service Quality and Miscellaneous Issues

Unmet needs and gaps in services were also identified in association with service quality, issues of affordability and other miscellaneous issues. These gaps and unmet needs include:

- Demand for many community transportation services exceeds the supply and capacity of local providers making it difficult for users to schedule trips. Many operators struggle to balance demand for same-day requests and subscription trips with the need to provide service to a wider population.
- Same-day service requests typically can not be accommodated, except through taxi subsidy programs.
- Limited ability to book subscription service. The ADA paratransit services and many of the dial-a-ride services limit subscription trips. Without the ability to book on-going regular trips, riders can not be ensured regular rides. This limits their usefulness of the service for work or school trips that have set schedules.
- Concerns over the quality of service were voiced across the study area. In most cases, people reported concerns with taxis showing up on time (or showing up at all), as well as with driver training and familiarity with the program clientele and program operations.
The recent fare increases for Special Services and TAP have presented some affordability issues for some ADA customers and especially those who use these services regularly, if not daily.
Chapter 3. Strategies to Address Service Redundancies, Service Gaps, and Unmet Needs

3.1 Introduction

This chapter provides an overview of coordination and mobility strategies that offer potential application to the study area. We have grouped strategies based on likely implementation timeframe: (1) short term strategies that could reasonably be implemented between six to twelve months (or less) once financial resources are in-hand and (2) longer term strategies that require more than one year to implement. Within each of these sections, we further categorized strategies into groups based on similar funding and implementation characteristics. Accordingly, information on funding and implementation is presented by type of strategy, followed by a one-page overview describing the relevant strategies. The overview includes (1) a description of the strategy; (2) local and regional applications of the strategy; (3) expected benefits; (4) obstacles; and (5) a national and/or regional best practice which exemplifies the strategy.

3.2 Shorter Term Strategies

We identified nine coordination strategies that could likely be implemented in a six to twelve month timeframe, once financial resources are awarded. These short term strategies are further grouped into the following categories:

- Information and information technology;
- Alternative mobility and service options; and
- Financing strategies.

Information and Information Technology

There are two short term strategies that use information and technology to support or improve coordination. These two strategies involve centralizing information and utilizing tools that improve productivity.

Implementation and Service Delivery

The key challenges associated with such strategies include establishing support and buy-in from decision makers and partnering organizations, and preparing for “real-world” repercussions as information is applied and incorporated into everyday operations. This is true for tools that improve productivity and centralize information across counties.
Developing, implementing, and maintaining a centralized directory of community transportation resources brings additional challenges because there are a significant number of services operating in the Chicago region, each of which has unique characteristics. In addition, many services will change their service parameters over time.

While any number of agencies likely have the capacity and skills to prepare a directory, best practice models show that the directories are most effective when prepared by a reliable organization with a regional scope and reputation, as well as a proven ability to partner with counties, municipalities, and other public and private community transportation operators and sponsors. For the directory to be successful, the project sponsor ideally would commit to updating and maintaining the directory for a specified period of time. An ideal organization would also have the capacity to obtain private sector and/or institutional support, through donations or advertisements, to help offset costs associated with preparing and updating the directory.

**Funding**

Information and information technology strategies require less investment and can usually be completed with staff resources. This is particularly true for the Non-Dedicated Vehicle Model, a tool for improving productivity. Software to run this model can be downloaded free-of-charge from the TRB website.

As the primary purpose of a centralized transportation information resource is to enhance consumer knowledge of existing services, creation of a transportation directory would be an allowable mobility management expense. All major FTA programs will permit mobility management expenses, including:

- Section 5307 (Urban formula program)
- Section 5309 (Major Capital)
- Section 5310 (Elderly and Persons with Disabilities Program)
- Section 5311 (Non-urbanized Area Formula Program – Kendall County only)
- Section 5316 (JARC)
- Section 5317 (New Freedom)

The federal share of mobility management costs may not exceed 80% of the net cost of the activity.
Centralized Information

Create a comprehensive directory of available community transportation services for each individual county and/or for the entire seven-county region. Ideally the centralized information will be available in multiple languages and formats, including potentially web-based or telephone formats.

Expected Benefits
- Improves access to available services locally
- Supports and facilitates regional travel
- Benefits clients and human service organizations

Potential Obstacles
- Multitude of services means developing and updating information to one source will be challenging
- Requires lead organization to take responsibility for county-level and/or regional directory
- Information requires on-going maintenance

Application in the Region

There is currently no regional directory of community transportation services. Five of the seven counties do not have a centralized directory. Only DuPage and Kane counties have county-specific directories, available in hard copy format and on their respective websites. A key challenge for both counties is to keep their respective directories updated and relevant.

Overview of National/Regional Best Practices

Hard Copy Directory. Access Services, Inc., serving as Los Angeles County’s Consolidated Transportation Service Agency (CTSA), publishes the Directory of Specialized Transportation Services. This is a comprehensive compilation of service and eligibility information on some 200 social service, public, medical, and commercial agencies offering transportation services within Los Angeles County.

Telephone Referral. Since 1992, Access Services, Inc. has also provided a telephone referral service called RIDEINFO that provides callers with quick and accurate referrals to over 200 public, private, and human service specialized transportation providers in Los Angeles County.

Website Directory. The transit information website created by the North Texas Transit Cooperation Association for the Dallas/Fort Worth area is a searchable directory of regional transit providers with basic contact and service information provided for each county or each region.

Multilingual Directory. The Toronto Transit Commission (TTC) offers multi-language transit information in more than 70 languages. Information can be obtained on-line or by telephone.
Tools that Improve Productivity

Paratransit operations are frequently called upon to increase service productivity and improve cost efficiency and reinvest “savings” into expanded service. Two operations concepts that focus on improving productivity and cost efficiency but that have not been widely adopted by paratransit operators include: (1) crafting a dedicated vehicle run structure that better matches the temporal demand profile; and (2) assigning to non-dedicated vehicles (e.g., taxis) trips that otherwise negatively affect the productivity of the dedicated fleet.

These concepts are not standard practice among paratransit operators because no reliable tools are available. A new software application was specifically designed to help with these two needs. The software is available, along with a user manual, on the TRB website.

Expected Benefits

- Improve service delivery and increase service productivity
- Examine different operating scenarios
- Reduce paratransit service costs

Potential Obstacles

- New tool that needs more testing
- Achieve internal buy-in from planning and operations staff
- Requires staff resources to learn model and collect and format data to operate it

Application in the Region

The model offers potential for any paratransit service in the region, including services in urban, suburban and rural areas.

Overview of National/Regional Best Practices

Non-Dedicated Vehicle (NDV) Model. The Non-Dedicated Vehicle (NDV) model was developed as part of TCRP B-30. This excel-based model, which is available free-of-charge from the TRB website, uses service information and data readily available for local parameters, such as driver/vehicle shifts, local labor practices (work shifts), driver costs, pay premiums for difficult shifts, operating and cost data, passenger trip length distributions, driver/vehicle run start and end times, passenger demand data by time of day, and availability and cost of non-dedicated vehicles.
Alternative Mobility and Service Options

The short term coordination strategies include opportunities to introduce new services or types of services as a way to expand mobility options for the target population. They primarily rely on existing resources and most would not (as individual strategies) require significant operational resources. They include:

- Establishing/Expanding Volunteer Driver/Escort Programs;
- Establishing/Expanding Taxi Subsidy Programs;
- Introducing Community Bus;
- Introducing Flexible Transit Services;
- Introducing Agency/Employment Tripper Services; and
- Expanding Reverse Commute Strategies.

Implementation and Service Delivery

Although these strategies include a variety of options and service designs, regional and national best practice models have many common attributes among implementation models. Each of these mobility strategies is best viewed (and implemented) as part of a portfolio of services, which work together to enhance mobility and accessibility, rather than as individual solutions.

Any service improvement or change, for example, increases its chances for success by (1) including end users in service design; (2) developing a communication and outreach strategy to educate and inform users about the new service or service change and (3) collecting and, as necessary, acting upon feedback after the improvement has been available for a few months.

Funding

The proposed strategies in this section represent a diverse group of transportation options that lend themselves to both traditional and non-traditional funding options. Programs aimed at the development or expansion of volunteer/escort services have benefited from community based efforts to attract local foundation and/or faith based organizational funding. Flexible transit services and other community based transit service options are candidates for traditional FTA and existing (local) transit funding mechanisms. These types of service are also potential candidates for New Freedom funding if the service can enhance mobility for persons with disabilities. Shuttle services to suburban employment trip generators may make suitable candidates for JARC funding. Similarly, expanded reverse commute projects are typical of the types of services that have historically been funded under the JARC program. Additionally, local organizations should not overlook the potential for developing partnerships with local and state one-stop centers to develop unique funding arrangements.
Volunteer Driver/Escort Programs

Volunteer driver programs typically provide mileage reimbursement to individuals that operate their own vehicles when they take individuals to medical appointments or other services, thereby negating the need for additional labor and capital costs.

Volunteer escort programs have volunteers accompanying riders to/from their destination on transit or paratransit.

Expected Benefits

- Increase schedule flexibility and reduce costs
- Develop program advocates in community
- Volunteers can provide physical and emotional support to riders

Potential Obstacles

- Recruiting and retaining volunteers can be challenging and requires on-going effort/attention
- Some shifts are hard to cover with volunteers
- Fuel costs and vehicle insurance can prohibit use of volunteers
- Insurance coverage may limit participation for some
- Most volunteer drivers are limited to ambulatory passengers

Application in the Region

There are several community transportation services in the region that are largely volunteer-based. Workshop input suggests that volunteer driver programs are an important resource in cost effectively transporting individuals whose mobility needs are difficult to meet with traditional transit or paratransit alternatives or whose travel needs include origins or destinations beyond these service areas. As such, there is great potential for the expansion of this strategy in less dense areas. However, there are numerous examples of successful volunteer driver programs in suburban and urban areas (see best practices below) suggesting that this strategy can be employed throughout the seven-county region.

Overview of National/Regional Best Practices

Ride Connection in Portland, Oregon is a non-profit, community service organization run for and by older adults that developed a volunteer driver program to meet the special needs of older adults. Ride Connection includes a network of over thirty agencies and over 370 volunteers providing in excess of 358,000 annual rides to 10,500 individuals, and is considered one of the best volunteer transportation services on the west coast.

Escorted Transportation Services Northwest (ETS/NW) in the Northwest Suburbs of Chicago uses volunteers to pick up clients at their homes, provide escort to the appointment, wait during their appointment, and return the client home.
Taxi Subsidy Programs

Taxi subsidy programs typically involve an arrangement between a sponsoring organization (or its agent) and a participating taxi company or companies. These programs accept and accommodate requests from sponsored customers, clients, or residents and/or accept vouchers provided by the sponsoring organization to riders as partial payment for the trip. Most taxi subsidy programs focus on seniors and/or persons with disabilities residing within the sponsoring municipality (or agency service area), but some are available to general public residents as well. Human service agencies that employ this strategy generally limited taxi subsidies to agency clientele or program participants.

Expected Benefits
- Provide same-day service
- Effective for unanticipated travel and evening and weekend hours
- Effective for trips outside of service area
- Offer way to set/control subsidy per trip
- Effective in low-density areas

Potential Obstacles
- Requires good communication among all parties
- Need to establish fraud-protection mechanisms
- Dearth of taxi companies in less urban areas within the region
- Dearth of accessible taxicabs

Application in the Region

Taxi subsidy programs are not new to the region. The largest one is the Taxi Access Program in Chicago. Several municipal-based dial-a-ride and some human service agency client transportation services are, in actuality, taxi subsidy programs. With the success of using taxis in DuPage County (both in an integrated fashion for Ride DuPage and a supplemental fashion in Pilot II), other collar counties are looking to replicate these strategies as they coordinate their paratransit services.

Overview of National/Regional Best Practices

The DuPage County Pilot II Subsidized Taxi Service is a nearly county-wide, user-side taxi subsidy program. Each sponsor defines its eligibility criteria and decides how much to charge for a voucher/coupon that is worth $5.00 towards a taxi fare. Service is available 24 hours per day, 365 days per year anywhere in DuPage County.

The Regional Transportation District (RTD) in Denver established the access-a-Cab service in response to a high denial rate on paratransit services and to reduce the per trip cost of its ADA paratransit service. Customers call RTD’s ADA paratransit call center (managed by First Transit) to request an access-a-Cab trip. Trips cost a flat $7.00 per trip.
Community Bus Routes

Community bus routes, also known as “service routes,” are fixed-route, fixed-schedule transit routes. They have a number of features that distinguish them from regular fixed-route bus routes; primarily that the routes and level of service are designed around the origins and destinations and needs of older adults and persons with disabilities.

Community bus routes can be an effective way to divert paratransit users to a lower subsidy per trip service that also provides more convenience (no request required). While designed to address local circulation needs of these target populations, these routes also can connect with more regional services (bus/rail). Community bus routes typically use small, low floor buses able to operate on neighborhood streets, enter driveways and parking lots. The focus is on front-door convenience at the expense of direct routing. Emphasis is on convenience, ease of use, and highly-personalized driver service.

Expected Benefits

- Enhanced travel options, especially in areas that lack fixed-route service
- Increases traveler independence
- Potential to streamline fixed-route service
- May reduce demand for paratransit services

Potential Obstacles

- Funds must be secured for capital, administrative and operating expenses
- Need to develop service, implementation and marketing plan

Application in the Region

Community bus routes have the greatest applicability and success rate in medium to high-density areas with local, short-distanced demand generators, and in communities where they can link high density housing to shopping, medical, and public services. In suburban communities, community bus routes can also be used to connect concentrations of seniors and/or people with disabilities with nearby shopping and medical areas, and to the Metra station, such as those in the Romeoville and Bolingbrook areas. Currently, these residences are not served by any fixed-route service. In urban or suburban settings, service might be provided a few days a week initially to assess the level of demand and could expand to daily service as the demand builds.

Overview of National/Regional Best Practices

Broward County (Florida) Transit established community bus routes in 15 communities to (1) provide more and more convenient mobility options for seniors and persons with disabilities; (2) divert ADA paratransit trips to a less costly service; and (3) streamline regional services. The operation has been successful in achieving all of these goals.

A local, albeit more limited, example of a community bus route is the Chicago Department of Aging’s (CDOA) Senior Shuttle service. These weekly services link various senior residences to participating grocery stores. Partial funding is provided by grocery stores.
Flexible Transit Services

A flex route is a route that has specific time points, but that can go “off route” (up to a certain distance) between those time points in order to pick up or drop off people at their homes or other locations. Flexible transit services usually fall into two categories: 1) Route deviation – the bus operates along a fixed route with a fixed schedule but may deviate to pick up or drop off customers within a certain distance from the route, returning to the route at or as near as possible to the point of exit, before continuing on the route; and 2) Point deviation – the bus may operate along any path to serve “in-between” requests, as long as the bus gets to the next scheduled bus stop on time.

Expected Benefits
- Provide an alternative service in less-densely populated areas where fixed-routes are not feasible
- Expands service coverage without ADA paratransit obligation
- Can be used to test demand and build ridership for eventual fixed-route service

Potential Obstacles
- More complicated than fixed-route for operators and dispatchers
- More difficult to stay on schedule
- Requires educating passengers
- Need to study and evaluate cost differentials between flex and fixed-route services

Application in the Region
Flexible transit would appear to be most appropriate in lower-density areas with dispersed origins and destinations, such as rural areas or in suburban areas at the end of a regular bus route. Another area within the region that might benefit from a flexible transit service is in Joliet where it could replace unproductive Pace bus routes. Another potential “target” would be linking the Batavia Apartments in northwestern Kane County to common demand generators in Elgin. In this case, buses pass by low-income housing, but do not stop because of the roadway design. A flex route that could deviate into the apartment complex would likely generate ridership and provide access for residents.

Overview of National/Regional Best Practices
Omni Ride in Stafford and Prince William Counties in Northern Virginia was implemented because (1) the service area’s suburban densities could not support fixed-route service; (2) there was no major focus of travel (origins and destinations were dispersed); (3) the viability of fixed-route service was limited by the road network and lack of sidewalks; and (4) there were limitations on available funding.

Mountain Line Transit serving Morgantown, West Virginia has 17 routes that deviate on request for persons with disabilities. This deviation service was introduced to replace a prior system of separate fixed-route and ADA paratransit services.
Agency/Employment “Tripper” Services

Regular “tripper” service typically involves the scheduled deviation of fixed-route buses in order to accommodate the needs of school students and personnel at key bell times only. These stops become part of the routes’ schedules. The only other real qualifier for this “tripper” service is that these buses must be open to the general public.

Using this type of service as a template, some transit systems have provided tripper service to human service agencies or employment centers that are located near, but not on routes, at times when clients or employees are going to/from these destinations. Sometimes, only a minor deviation may be needed, e.g., to let off or pick up agency clients on the agency side of a busy street.

Expected Benefits
- Reduce demand for paratransit service and lower system-wide costs
- Increase service options and improve mobility

Potential Obstacles
- Requires multi-agency agreement on service characteristics, cost sharing, etc.
- Other obstacles may arise depending on time and distance associated with service change

Application in the Region

Opportunities for tripper services in the seven-county region are most likely to be in areas, such as McHenry County, where longer distance fixed-route services connect urban areas. Such routes could include scheduled trips to regional facilities such as senior centers, hospitals, or job training classes or to coincide with class schedules, event times or clinic times. Adding these specialized trips could help improve route productivity and offer members of the target populations a transportation alternative that does not require scheduling rides or higher fares. Tripper routes may also reduce demand for paratransit services.

Overview of National/Regional Best Practices

The Lane Transit District (LTD) in Lane County, Oregon has a route that makes a scheduled deviation to Goodwill Industries at key times when there is a lot of demand from riders with disabilities. The transit staff at Lane Transit worked closely with the Goodwill staff on timing, and keeps in contact with Goodwill to make sure that any changes in program start and end times are accommodated. LTD staff report that 7,750 trips are served per year.
Reverse Commute Strategies

Reverse commuting is a strategy to link people with job opportunities in the suburbs. One of the primary reasons for high inner-city unemployment is the fact that many lower wage scale or entry-level jobs are increasingly being created in the suburbs. This “spatial mismatch” between where workers live and where/when jobs are located calls for innovative transit solutions. Some possible strategies include creating new reverse fixed routes or new shuttle services linking stations or hubs to employment sites/areas and reverse-commute vanpools, plus strategies such as guaranteed ride home services and child transportation services.

Expected Benefits
- Opens suburban job markets to urban residents, especially transit-dependent individuals
- Partnerships with employers may provide opportunities to reduce costs

Potential Obstacles
- Most strategies can be relatively easily implemented but require financing
- Reverse commute strategies may require partnerships with employers

Application in the Region

The service boards recognize the importance of reverse commuting in their service area and consider it a priority in meeting the commuter needs. Feeder shuttle service to/from Metra stations is a major component of the Pace service area, although there are some locations where shuttle service or bus routes could better address reverse commute needs. Pace has nine reverse-commute vanpools; most focus on employers or destinations in Cook County and are “urban” vanpools that begin at the train station. In these cases vanpool riders take the train or bus to a Metra station and then take a van to their job. CTA has also experienced success with reverse commute strategies; using JARC funds, CTA extended existing operating hours services to match reverse commute and second shift work schedules.

Overview of National/Regional Best Practices

New Reverse-Commute Fixed-Route. In 2001 the Los Angeles Metropolitan Transportation Authority (MTA) initiated a successful express bus service that starts in downtown in the mornings and travels to the San Fernando Valley suburbs.

Feeder/Distributor Shuttles at Suburban Rail Stations. Metra operates the P-8 free shuttle from an origin within ¾-mile of a non-accessible station to the next accessible station, enabling persons with disabilities access to the rail services.

Reverse-Commute Vanpools. The Philadelphia Unemployment Project (PUP) operates a reverse commute vanpool program. PUP pays for gas and insurance; vans are driven by vanpool members.

Guaranteed Ride Home. In the Washington DC area, Commuter Connections offers free services such as regional ride matching and Guaranteed Ride Home programs.

Child Transportation Services. The Chattanooga Area Regional Transportation Authority (CARTA) provides demand-response transit service to day care facilities and to schools. Vans are equipped with on-board monitors to protect young children traveling to and from day care without parents.
Financing Strategies

One financing strategy is included in the list of potential short term coordination strategies; accelerating reimbursement. The objective of this strategy is to cover the potential cash shortfall problems of community transportation operators wishing to also provide Medicaid non-emergency medical transportation (NEMT).

Implementation and Service Delivery

The key implementation issues associated with this strategy are multi-fold. In the first case, a project sponsor would need to set up a lending program that provides short term “bridge” loans to new Medicaid operators for a specified period of time. Lending eligibility criteria must be clearly established, including the types of providers eligible to participate, the terms of the loan, and the penalties associated with not meeting loan terms. Ideally, a project sponsor would also work closely with human service transportation providers to help articulate specific needs and Medicaid-eligible passengers. New service providers should demonstrate how they address these needs and fill service gaps. This will need to be done in conjunction with becoming certified as a new NEMT provider. In addition, program sponsors should anticipate and address potential concerns raised from existing NEMT providers over new entrants to the market.

Funding

As noted above, the establishment of a revolving lending program to provide bridge funding is essential to the success of this type of strategy. The funds to seed the lending bank typically come from local and state governments. Potential sources to fund this program include Section 5317 and Medicaid.
Accelerating Reimbursement

This strategy is specifically designed to encourage private, non-profit human service agency operators to become Medicaid non-emergency medical transportation (NEMT) providers by reducing the time associated with getting paid to provide the service. Currently service providers wait approximately 4 to 5 months before being reimbursed; this lag period can pose a cash-flow barrier to entry for some potential providers. Thus, the strategy would be to provide, in effect, a perpetual short-term loan for private, non-profit community transportation providers that covers this lag period, hence allowing these providers to become Medicaid NEMT carriers.

Expected Benefits

- Provides statewide Medicaid NEMT call center with more, less expensive options
- Allows local service providers another fully-funded revenue source
- Encourages ridesharing
- Improves system cost efficiency

Potential Obstacles

- Administrative obstacles associated with being a Medicaid provider (vehicle inspections and insurance requirements)
- Potential complaints from existing operators about competition

Application in the Region

There are currently Medicaid non-emergency medical transportation (NEMT) providers in the region who are struggling with delayed reimbursement from the Department of Healthcare and Family Services (HFS). According to the Rich Township Transportation Service (RTTS), it is not uncommon for these providers to experience delays of up to 4-5 months for reimbursement. RTTS has been a Medicaid provider since 2005 because it was already carrying Medicaid-eligible trips that could receive full funding. With HFS reimbursing full costs associated with Medicaid trips, RTTS is able to stretch its other funding sources (from Pace, the township, and municipalities within the township) to keep up with other demand. While Rich Township is able to cover cash flow with other revenue sources, other agencies interested in becoming Medicaid providers may not. This strategy offers potential for existing private, non-profit community transportation providers in urban and suburban areas alike, but would be especially helpful (to HFS/First Transit) in communities where there is a dearth of for-profit Medicaid NEMT providers.

Overview of National/Regional Best Practices

There are numerous cases of transit agencies advancing payment to contractors and reconciling in areas to circumvent cash-flow issues. For example, the State of South Carolina, through its Department of Transportation, had a fund for transit providers who contracted with human service agencies to ensure that the provider organizations have adequate cash flow. In other situations, such as the Transit Disadvantaged program in Florida, contract brokers will bill Medicaid directly for services while compensating providers directly in accordance with contract payment cycles. The brokers typically use electronic billing methods to expedite payment from the state Medicaid office.
3.3 Longer Term Strategies

We identified ten coordination strategies that have a longer implementation time frame and would likely require twelve months or more to implement. The strategies are grouped into the following four categories:

- Contracting and consolidation
- Service improvements
- Strategies that improve physical access
- Information technology

Contracting and Consolidation

Among the longer term strategies, five pertain to techniques associated with changing current business practices. The contracting and consolidation strategies work to create cost-efficiencies by sharing services, purchasing power and administrative resources. They include:

- Joint Purchasing;
- Sharing Resources;
- Contracting with Agency Operators;
- Contracting with Common Service Providers; and
- Consolidating Functions.

Implementation and Service Delivery

Generally speaking, contracting, purchasing and consolidation issues require a longer implementation time frame due to time associated with changing business practices and developing agreement and contractual terms across independent agencies. Once these agreements are in place, implementation can be achieved within three to six months. An exception to this is consolidating service delivery functions; successful implementation of this strategy requires not only legal and contractual agreements but also new physical, technological and personnel systems.

Funding

In most cases funding for contracting and consolidation issues is available through the larger federal grant programs; indeed most federal programs are designed to reward grant applications that demonstrate how additional services can be purchased by utilizing existing capacity of existing operations.

Contracting and consolidation strategies by definition offer business models that seek to maximize existing funding. This principle is further evidenced with new regulations regarding local match requirements under most FTA programs. When a coordination program involves the provision of service under contract, the revenues earned by the FTA-funded service provider may be used as local match (as opposed to fare box and related income), even if the source of the contract funds are from another federal program.
Joint Purchasing

Joint purchasing focuses on coordinating functions commonly undertaken by multiple organizations as a way to achieve greater cost efficiency and eliminate redundant activities. Community transportation operators, for example, could consolidate vehicle maintenance, purchase of insurance, driver training, and substance abuse testing. Through group-purchasing of common products or services, participating entities may increase purchasing power, and receive preferential service and prices.

<table>
<thead>
<tr>
<th>Expected Benefits</th>
<th>Potential Obstacles</th>
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<tbody>
<tr>
<td>• Agency level cost savings</td>
<td>• Requires lead agency to champion</td>
</tr>
<tr>
<td>• More consistent operating procedures</td>
<td>• Administrative costs to lead agency may be prohibitive</td>
</tr>
<tr>
<td>• Shares administrative functions rather than resources or services, therefore, may be more easily implemented</td>
<td>• Some agencies may have entrenched procurement/purchasing requirements</td>
</tr>
<tr>
<td>• Opportunity to build and develop trust across agencies</td>
<td>• Joint purchase of some items may require large initial expenditure</td>
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Application in the Region

Pace has effectively implemented joint purchasing of vehicles, fuel and computer hardware/software for its consolidated ADA and dial-a-ride paratransit operations. For other organizations, opportunities for sharing resources are wide-open, especially among agencies that are funded by a common source. Specific strategies applicable to both human service agencies and municipal providers may include bulk fuel purchases and/or group insurance.

Overview of National/Regional Best Practices

**Maintenance.** DARTS in Dakota County, Minnesota maintains vehicles for 80-90 organizations. DARTS recognized the need for reasonably priced, high quality maintenance services and in an effort to offset internal maintenance costs, successfully marketed maintenance services to other providers.

**Fuel.** The Kanawha Valley Regional Transit Authority (KRT) in Charleston, West Virginia implemented a bulk purchase fuel program that allowed tax exempt public and non-profit entities receiving FTA funds to purchase lower cost fuel from KRT. KRT administers the program for qualified eligible recipients.

**Insurance.** In Washington State, the Non-Profit Insurance Program (NPIP) administers a Joint Insurance Purchasing program. NPIP members jointly purchase insurance and claims adjustment, risk management consulting, and loss prevention services. Primary benefits are lower insurance premiums and stable access to the insurance market.

**Computer Hardware and Software.** DARTS (see above) orchestrated the joint purchase of Trapeze upgrades and new hardware for several of its counterpart county-based providers serving other suburban counties in the Twin Cities area.
Sharing Resources

This strategy involves the shared purchase and/or use of resources such as vehicles and facilities; support services such as software, driver training, drug testing, program management; and policies, procedures, and implementation plans.

Expected Benefits

- Lower per trip costs
- Increased vehicle productivity
- Improved service quality

Potential Obstacles

- Requires lead agency to champion
- Turf issues associated with sharing vehicles due to high costs of purchasing, operating and maintaining vehicles
- Reluctance to share agency funded vehicles
- Requires quality control, monitoring and cost allocation systems

Application in the Region

There are considerable human service agencies and public organizations in the seven-county study area that provide transportation services to ensure individuals can participate in specific programs. Oftentimes, vehicles used by these types of programs have “downtime” when vehicles are not in operation. By sharing resources, program sponsors may use township/municipal dial-a-ride vehicles (or services) to transport clients. Within the region, this strategy is especially applicable to urban and to some suburban areas where there is a larger set of community transportation service providers that can potentially band together. However, there is no reason why a regional approach to sharing certain resources could not be attempted.

Overview of National/Regional Best Practices

Vehicle Sharing. DARTS, Dakota Area Resources and Transportation Services, in West South Paul, Minnesota, is a private, non-profit human service agency with 37 vehicles. DARTS shares the operation of a Section 5310 vehicle with the City of Farmington Senior Center and St. Michael’s Church. DARTS applied for the 5310 vehicle, paid the local match, and pays insurance and maintenance costs. DARTS operates the vehicle Monday through Thursday. The City of Farmington Senior Center operates the vehicle on Fridays and for special after hours and weekend events, providing the driver and paying for fuel and a maintenance and insurance fee. St. Michael’s Church operates the vehicle on weekends using volunteer drivers; they pay for the fuel. All drivers operating the vehicle must complete DARTS drivers’ training program and be certified by DARTS.

Software Sharing. DARTS also allows other community transportation service providers to use its paratransit scheduling software via a multiple-site license of Trapeze PASS. One organization, The Elder Ride, accepted DARTS’ offer and now rents Trapeze PASS from DARTS.
Contracting with Agency Operators

Contracting with agency operators involves taking advantage of down-time associated with some services and using this excess capacity to satisfy unmet demand at other organizations. Accordingly, those needing to expand capacity could purchase service from human service agency operators with idle vehicles or excess capacity.

Expected Benefits

- Increased efficiency in service delivery
- Lower per trip costs
- Maximizes fleet utilization
- Increased revenues for organizations that “sell” excess capacity
- Improved service quality for clients through increased service options

Potential Obstacles

- Concern among existing ADA service providers who may be reluctant to give up a portion of the market
- Ensuring potential agency contractors are familiar with ADA regulations such that the services are administered according to agency standards.

Application in the Region

Regionally, significant coordination between ADA and dial-a-ride services through Pace contractors or Pace-funded vehicles already exists. Locally, two human service agencies, Open Door and the Veterans Administration, purchase service from another agency, the Fox Valley Older Adults. A potential application in the region may be in eastern Will County and southern Cook County where the Pace ADA operation typically has lower-than-average productivity because of the expansive areas that need to be covered. Eastern Will Senior Citizens Center (EWSCC) could potentially serve as an auxiliary contractor and improve productivity of the ADA fleets by serving out of the way trips for the Pace ADA operation.

Overview of National/Regional Best Practices

In Norwalk, Connecticut, to meet its ADA paratransit obligation, the Norwalk Transit District (NTD) utilizes external resources before expanding to its directly-operated fleet. NTD accordingly contracted with five different agencies to provide ADA service, filling unused capacity on the contracting agency vehicles. This has resulted in lower rates per hour for NTD and creates revenue for subcontractors as vehicles would otherwise be idle.

In Boston, Massachusetts, the MBTA contracts with four operators to provide ADA paratransit service. One operator, the Greater Lynn Senior Services (GLSS), is allowed by the MBTA to co-mingle ADA paratransit trips with its own senior trips, creating service efficiencies through shared rides. In return, the MBTA gets a preferred per trip rate for ADA paratransit service.
## Contracting with Common Service Providers

Sponsoring agencies using common non-dedicated service providers may allow the co-mingling of their customers/clients between agencies as long as service standards are not violated. By allowing co-mingling of their riders, the sponsoring agencies get preferential rates. The characteristic of this strategy that distinguishes it from a more consolidated approach is that one or more sponsors have uncoordinated contracts with a common vendor.

<table>
<thead>
<tr>
<th>Expected Benefits</th>
<th>Potential Obstacles</th>
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<tbody>
<tr>
<td>• Increase efficiency of vehicle operations</td>
<td>• Requires strict policy directive from administering agency and adoption of policy by participating agencies</td>
</tr>
<tr>
<td>• Decreases the cost per trip</td>
<td>• Requires administrative oversight, performance monitoring and fraud control efforts</td>
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<tr>
<td>• Increases local or regional capacity</td>
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## Application in the Region

With the exception of Rich Township, there is currently no co-mingling of Medicaid non-emergency medical transportation (NEMT) with other community transportation services within the seven-county study area. There are, however, numerous private, for-profit contractors in the region that provide NEMT that could be harnessed for other types of community transportation. This is similar to the use of taxi companies in the Ride DuPage program. The converse, using existing community transportation resources to carry Medicaid NEMT trips, also holds promise. For example, there are existing community transportation providers, such as the Eastern Will Senior Citizens Center, that may be interested in becoming a Medicaid provider if co-mingling of these trips with their existing client trips is allowed.

## Overview of National/Regional Best Practices

In Dakota County, Minnesota, compatible ADA, senior, job access and group-home trips sponsored by different agencies through separate contracts with DARTS (see above), are co-mingled on DARTS vehicles, rather than being served by four different fleets.

In the Denver metropolitan area, LogistiCare, the regional Medicaid broker, allows its clients’ non-emergency medical transportation trips to be co-mingled with other trips sponsored through other contracts with one of its vendors, Special Transit, that serves Boulder.
Consolidating Functions

The consolidation or merger of various operating functions under a single operating entity is considered the highest level of transit coordination. The two most common approaches are (1) to consolidate call center functions (reservations, scheduling, and even dispatching) under a call center manager or broker; and (2) to consolidate call center functions plus some or all of the service delivery functions.

Expected Benefits
- Creates cost-efficiencies by consolidated trip reservations and scheduling staff
- Maximizes opportunities for ride sharing
- Improves service delivery and customer satisfaction
- Potentially provides leverage to securing additional federal funding
- Cost savings translate into increased service

Potential Obstacles
- Requires champion agency to take on consolidation and support idea
- Once implemented, requires leadership, ongoing attention and committed staff
- Turfism issues arise over service quality, loss of control and “place” in community
- Requires project governance, cost allocation/reimbursement models and service delivery standards

Application in the Region

This strategy would be applicable to the more urbanized parts of the study area; while potentially more complicated to organize, the diversity of existing services there also means greater potential benefits. At the same time, the success of Ride DuPage in a more suburban setting, and the upcoming Ride-In-Kane project, both of which are designed around a coordinated call center using the local Pace operator as a building block, suggests the model has applicability in collar counties as well. Note too that there is already a regional, and statewide, call center in place for Medicaid non-emergency medical transportation trips.

Overview of National/Regional Best Practices

Consolidated Call Center Functions. The Senior Transportation Connection (STC) in Cleveland, Ohio is a central entity managing and coordinating countywide delivery of transportation services. STC routes trips and assigns trips to the appropriate provider. Trip orders are conveyed by fax or electronically to contract providers.

Consolidated Service Delivery (Centralized Model). In DuPage County, Pace’s operations contractor, Veolia Transportation, manages the call center and operates a dedicated fleet, taking reservations for both ADA and dial-a-ride customers and scheduling them onto its fleet, co-mingling the trips when it is efficient to do so.

Consolidated Service Delivery (Decentralized Model). The Port Authority of Allegheny County (PAT) in Pittsburgh contracts with Veolia Transportation as a broker. Veolia, in turn, contracts with private and non-profit carriers who perform reservations, scheduling, and dispatching for distinct service areas. Customers are assigned to carriers based on their zone and all trips are co-mingled; fares are also dependant on zone and use scrip and cashless fares.
Service Improvements

Strategies to improve service convenience can have a profound impact on customer mobility. While we referenced service improvements as a single strategy, there are in reality a variety of techniques and methods to enhance customer convenience including:

- Expanding the days and/or hours of service;
- Expanding the service area for pick-ups and drop-offs and/or adding destinations;
- Providing door-to-door assistance (as compared with curb-to-curb assistance) globally throughout the region; and
- Offering same day service by reducing the advance notification period.

Implementation and Service Delivery

Among the most significant implementation challenges associated with any service improvements are funding and commitment. Many transit providers are reluctant to take on the additional costs associated with new services without reliable, sustainable funding sources. Once funding is secured, however, most transit providers have the skills and tools to improve and expand services. We have categorized this strategy as a longer term strategy recognizing the time associated with increasing operational capacity.

Funding

As discussed, an essential component of implementing service improvements is identifying and securing reliable and sustainable funding. This is true for new and/or expanded service. Unlike capital projects with largely fixed implementation costs, service improvements require on-going funding sources. Some of the national and regional best practices which have been able to offer high levels of service typically are able to do so by either identifying a reliable local funding source such as state, municipal or institutional funds and/or by charging higher fees for premium services. Some of the non-FTA funding sources that may be examined for their potential to support service improvements include:

- Other federal programs – The Federal Interagency Coordinating Council on Access and Mobility has identified 64 federal programs that support passenger transportation; 56 of these programs are administered by seven departments exclusive of the Department of Transportation.

- Community foundations – A number of service projects use foundation grants as seed or start-up funding for coordination projects, especially programs that can demonstrate expanded mobility for specific target populations.

- Local membership cooperatives – In some parts of the country, communities have worked together to form membership cooperatives to participate in the design, implementation and funding of community transportation services.
**Improving Service Convenience**

Strategies to improve service convenience can have a profound impact on customer mobility. They include; (1) Temporal expansion of service – expanding the days and/or hours of service; (2) Spatial expansion of service – expanding the service area for pick-ups and drop-offs, and/or adding destinations beyond the established pick-up area; (3) Upgrading level of driver assistance – providing door-to-door assistance; and (4) Same-day service – reducing the notification period to enable same-day requests.

<table>
<thead>
<tr>
<th>Expected Benefits</th>
<th>Potential Obstacles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Enhance customer accessibility, mobility and convenience</td>
<td>• Expanding service convenience requires additional financial resources</td>
</tr>
<tr>
<td>• Provide opportunities to additional mobility options and greater ease of travel</td>
<td>• Requires educating and training staff and customers to maximize benefits associated with cost</td>
</tr>
<tr>
<td></td>
<td>• Expanded driver assistance may encounter liability, training, union and service issues</td>
</tr>
</tbody>
</table>

**Application in the Region**

There are potential applications for each of the customer convenience strategies across the region as most parts of the region in both urban and suburban areas could benefit from increasing service hours and geographic coverage. Outside of the Special Services area, few services offer door-to-door assistance or allow same-day service.

**Overview of National/Regional Best Practices**

**Temporal expansion of service.** The Alameda-Contra Costa Transit Authority (AC Transit) extended the hours and days-of-week operations for five bus routes connecting low-income areas of Oakland with employment centers near the Oakland International Airport and downtown.

**Spatial and temporal expansion of service, and upgrading level of driver assistance (door-to-door).** Special Transportation Services (STS) in Miami/Dade County, Florida, and ACCESS in Pittsburgh/Allegheny County, Pennsylvania are brokered paratransit services that provide county-wide ADA paratransit services beyond the required ¾-mile corridors.

**Upgrading level of driver assistance (door-through-door).** Metro Mobility provides transportation for people with disabilities on a "first-door-through-first-door" basis.

**Spatial expansion and same-day “premium” service.** The Santa Clara Valley (California) Transportation Authority’s (VTA) ADA paratransit service provides one-way trips within the service area for $3.50/trip. Premium service (travel outside the service area, same-day service and open-ended returns) is available for a surcharge.
Strategies that Improve Physical Access

Strategies associated with improving accessibility involve making infrastructure improvements to transit and inter-modal stations that permit a wider spectrum of the population to physically access these locations. We have identified two strategies that involve improving accessibility of non-key rail stations and at fixed-route bus stops.

Implementation and Service Delivery

Making physical changes to non-key rail stations and/or fixed-route bus stops requires considerable planning to ensure the project is designed, funded and executed effectively and efficiently. This is especially true if improvements require construction that will inconvenience existing travelers or otherwise disrupts existing service schedules. Physical improvements are also expensive.

National and regional best practice models demonstrate that accessibility improvements require considerable commitment and leadership on the part of the lead agency and on-going public education and outreach. Companion public education campaigns should initially focus on informing existing travelers about project timelines and goals. Subsequent education campaigns must target populations and markets to which the projects are directed.

Funding

Making accessibility improvements to transit and inter-modal stations not designated as key stations is considered to meet the eligibility for New Freedom funds, so long as the projects are clearly intended to remove barriers that would otherwise have remained. One key factor in determining eligibility of New Freedom funds for these types of enhancements is that the project did not have an identified funding source as of August 10, 2005, as evidenced by inclusion in the Transportation Improvement Plan (TIP) or the STIP. In other words, if not for the New Freedom Program, these projects would not have consideration for funding and proposed service enhancements would not be available for individuals with disabilities.

In addition, several other FTA programs permit accessibility improvements including:

- Section 5307 (Urban formula program)
- Section 5309 (Capital)
- Section 5310 (Elderly and Persons with Disabilities Program)

Most FTA programs permit a higher rate of federal participation (90%) in the incremental costs of mobility enhancement projects.
Accessibility Improvements at Non-Key Rail Stations

Making accessibility improvements to transit and inter-modal stations not designated as key stations is considered to meet the eligibility for New Freedom funds, so long as the projects are clearly intended to remove barriers that would otherwise have remained.

In many situations, improving the accessibility of non-key stations in a service area may play a significant role in easing the travel burden for people with disabilities. Non-key stations are much more likely to be “partially accessible” due to their location and traffic volume as compared to key stations. However, often it is the non-key station that is most critical to the travel pattern of these transportation disadvantaged individuals.

Expected Benefits

- Increases mobility and travel options for persons with disabilities
- Reduces demand for ADA paratransit service and improves system-wide costs

Potential Obstacles

- Improvements are typically expensive
- Long lead time with potential for disruptions to existing service and travelers

Application in the Region

During the past three years, Metra made substantial accessibility improvements to six of the eight non-key stations along the South Chicago Branch of the Metra Electric Line. The two remaining stations will be improved during 2007. Non-key stations on Metra’s other branch lines are potential projects for accessibility improvements.

Overview of National/Regional Best Practices

Boston has the oldest subway system in North America, thus it is a prime candidate for accessibility upgrades. The Massachusetts Bay Transportation Authority (MBTA) started working toward achieving station accessibility in 1990. Since that time, MBTA has made 73 of its 80 key stations accessible, allocated the construction funds for the remaining seven, and has begun making dozens of non-key stations accessible as part of station modernization projects. In 2006 the MBTA entered an agreement with the Boston Center for Independent Living that called for increased funding for elevator improvements, accelerated purchases of low-floor buses and buses with lifts, management and training initiatives, and new public address systems.


**Improving Access to Fixed-Route Bus Stops**

Improving the accessibility of and access to fixed-route bus stops involves first examining bus stops (and especially those used or potentially used by significant numbers of older adults and/or persons with disabilities) and evaluating if improvements could help make stops more accessible. Potential infrastructure improvements may include removing barriers on sidewalks, improving or adding sidewalks, adding curb cuts, adding or improving pedestrian crossings and signals (including audible signals and countdown signals), and adding signage, lighting, benches, shelters, and other pedestrian enhancements, especially in the vicinity of bus stops. In addition, technological solutions akin to way-finding devices might help blind people locate bus stops.

<table>
<thead>
<tr>
<th>Expected Benefits</th>
<th>Potential Obstacles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Encourage use of fixed-route system</td>
<td>• Physical improvements require financing and typically have a long lead time</td>
</tr>
<tr>
<td>• Reduce reliance on paratransit service</td>
<td>• Many improvements require prioritization, funding and commitment from local authorities</td>
</tr>
<tr>
<td>• Secondary impacts associated with community development and enhanced safety</td>
<td></td>
</tr>
</tbody>
</table>

**Application in the Region**

Improving accessibility around fixed-route transit services has two key applications in the study area:

- In existing urban areas, there are several transit stops where accessibility could be enhanced with improved infrastructure. In many cases, stops may also benefit from improved maintenance.
- In the rapidly growing areas, new development and fixed-route services should incorporate transit-oriented design principles and accessibility standards to ensure new development is safely and easily accessed by all members of the community.

**Overview of National/Regional Best Practices**

An Easter Seals Project ACTION project developed a Bus Stop Accessibility and Safety Toolkit that is designed to help transit agencies develop an inventory of bus stops, assess the accessibility and safety of each bus stop and access to that bus stop, and create an action plan to address shortcomings. HART in the Tampa area has recently used this toolkit to put together such an inventory. DART in Dallas is in the process of surveying all of its bus stops, including taking a photograph of each stop location.
Information Technology

Technological tools that aim to support and enhance public transit and human service transportation services develop alongside new coordination strategies and hence are eligible for funding under some of the federal programs. Our list of relevant strategies includes a series of technological tools; the two with a longer implementation timeframe are tools that improve data integrity; and tools that support live dispatch.

Implementation and Service Delivery

The most significant obstacle associated with implementing new technology, especially in cases where new technology is being developed, is training staff to operate and manage the technology as well as integrating new systems with older technologies. Similar with other strategies, best practice models suggest that implementation must be done carefully, especially when consumers are involved. Technological projects are likewise best achieved by demonstrating success on a smaller scale, learning from and building on success before implementing new tools system-wide.

Other implementation lessons involve ensuring front-line staff and end-users are involved throughout the project, including design and testing and that all potential users are sufficiently trained in the system. Many operators experienced with implementing new technology also underscore the importance of allocating sufficient time for new technologies to be developed, examined and fully tested before bringing them into the main stream.

Funding

Hardware and software that support coordination strategies are eligible for capital funding (requiring a 20% local match) under the New Freedom program.
Tools that Improve Data Integrity, Fare Collection, Cost Sharing/Allocation, Billing/Reporting, and Transfers

MDT/AVL Technology – Incorporating mobile data terminals (MDTs) and automatic vehicle locating system (AVL) technology into paratransit services to track vehicle movements.

Automated Cost Allocation of Co-Mingled Trips – Automated cost allocation of co-mingled trips involves tracking the live (or “real”) travel time or mileage for each trip.

Centralized Fare Collection – Allow centralized fare accounts to be maintained for each customer (individual or agency) with fares collected automatically as trips are taken.

Smart Card Technology – Client and eligibility information could be stored on a card, which is swiped in (or held in proximity of) a reader as riders board and exit the vehicles.

Expected Benefits
- Improved system management and reduced administrative costs
- Increased service efficiency and enhanced service delivery

Potential Obstacles
- Start up costs may be significant
- Requires training staff to operate and manage technology
- Must integrate new and old systems

Application in the Region

Pace is already using several technologies to manage paratransit operations and shares some technology such as Trapeze software with ADA/dial-a-ride contractors. Pace has also installed MDT/AVL equipment on much of the paratransit fleet provided to contractors. Pace plans to implement similar technologies for Special Services service area. Management technologies, such as Trapeze software, may be relevant tools for some of the larger township and human service sponsored dial-a-ride programs, especially services that are not operated as part of Pace contracts.

Overview of National/Regional Best Practices

MDT/AVL Technology and Trip Sponsorship. The ADA/dial-a-ride and Ride DuPage services in DuPage County utilize a version of Trapeze (supplied by Pace) in conjunction with MDT/AVL capabilities that automatically record the location and arrival and departure times of vehicles.

Automated Cost Allocation. Outreach, the ADA paratransit broker in Santa Clara County, California uses a version of Trapeze that allocates shared trip mileage among sponsors.

Centralized Fare Collection. The MBTA in Boston, Massachusetts and Outreach in Santa Clara County have a centralized fare collection system for its ADA paratransit customers.

Smart Card Technology. The Client Referral, Ridership, and Financial Tracking (CRRAFT) system provides flexible reporting capabilities that support various agencies in New Mexico.
Tools that Support Live Dispatch

Live dispatch refers to automated dispatching systems. Such systems are critical for large paratransit services wanting to allow for same-day travel requests; one of the most frequent unmet needs cited in the workshops. Live dispatch, especially for large systems, necessitates a software system that incorporates reservations and scheduling capabilities with current or predicted vehicle location information. Information may be transmitted to the system via MDT/AVL equipment to facilitate dynamic, “live” dispatching of unscheduled trips to vehicles.

Expected Benefits

- Live dispatch enables same-day shared ride service
- Increases service efficiency and reduces cost
- Offers method to replace unproductive bus routes

Potential Obstacles

- System requires significant cost
- May further increase costs by increasing service demand
- Requires investment in staff training
- Requires agency-wide buy-in

Application in the Region

The primary application of live dispatch in the seven-county study area is if Pace or any of its municipal partners migrates from advance requests to same-day. A potential regional application would be conducting demonstration sites for the software, starting in areas with unproductive fixed-route service. In the Joliet area, for example, unproductive fixed-routes could be replaced with same-day general public dial-a-ride service. At the point where more than a few dial-a-ride vehicles are required, the Call-n-Ride system may be appropriate.

Overview of National/Regional Best Practices

Digital Dispatch System. Some Access Services contractors in Los Angeles, California use a live dispatch system called Digital Dispatch System or DDS, on several of their vehicles providing ADA paratransit service. DDS dispatches unassigned trips to vehicles based on their location and current assignments.

Call-n-Ride (CnR). The Regional Transportation District (RTD) in Denver has established 14 neighborhood-based same-day/immediate-request, general public dial-a-ride services. These services are in locations that are approximately 4 by 6 miles in area and that can not support fixed-route service. To date, CnR service requests have gone right to the driver’s cell phone. In response to higher demand, the RTD has commissioned software to enable multiple CnR vehicles to operate in a service area in a way that is transparent to the user (single phone number) and streamline trip requests, scheduling, and system management.
Chapter 4. Priorities for Implementation

4.1 Overview of Federal Funding Programs

The Safe, Accountable, Flexible, Efficient Transportation Equity Act – A Legacy for Users (SAFETEA-LU) is a federal transportation bill that requires regions to establish locally-developed, coordinated public transit-human services transportation plans in order to access three specific FTA funding programs. SAFETEA-LU states that projects funded by these programs must be derived from a locally developed, coordinated public transit-human service transportation plan. The stated goal is to maximize the three programs’ coverage by minimizing the duplication of services. SAFETEA-LU also stipulates that the plan be developed through a process that includes representatives of public, private and non-profit transportation and human services providers, and participation by the public.

The three funding programs are summarized below, along with excerpts from the March 29, 2007 Federal Register covering the three programs, and from the May 1, 2007 guidance circulars from the FTA.

1. FTA Section 5310 – Transportation for Individuals who are Elderly and Individuals with Disabilities. This program “provides funding, allocated by a formula, to States for capital projects to assist in meeting the transportation needs of older adults and persons with disabilities. The State administers the program.” This funding is available to private, non-profit entities (or if none exists in a given service area, public entities) that are involved in transporting seniors and persons with disabilities. Section 5310 funding has historically been used for capital expenditures, and typically for the purchase of accessible vehicles.

2. FTA Section 5316 – Job Access and Reverse Commute Program (JARC). “The JARC program was established to address the unique transportation challenges faced by welfare recipients and low-income persons seeking to get and keep jobs. With many new entry-level jobs located in suburban areas, low-income and/or welfare recipients have found it difficult to access these jobs from the inner city, urban and rural neighborhoods on a daily basis. Further, many entry-level jobs require working late at night or on weekends when conventional transit services in many communities are either reduced or non-existent. Finally, many employment-related trips are complex for low-income persons, often involving multiple destinations, including reaching childcare facilities and other services as part of the trip.” With these challenges in mind, “the goal of the JARC program is to improve access to transportation services to employment and related activities for welfare recipients and eligible low-income individuals and to transport residents of urbanized and non-urbanized areas to suburban employment opportunities.” Activities related to employment might be educational opportunities or training that directly contribute to job attainment. Toward this goal, the FTA provides financial assistance for transportation services planned, designed, and carried out to meet the transportation needs of eligible low-income individuals and of reverse commuters regardless of income. Access to funds from this program requires coordination with federally-assisted programs and services in order to make the most efficient use of federal resources. Examples of such projects include fixed-route services oriented to reverse commuters and/or at times specific...
to access lower wage jobs; shuttle services to/from rail stations; ridesharing activities such as vanpool or carpools, and mobility management efforts.

3. FTA Section 5317 – New Freedom Program (NF). “The purpose of the New Freedom program is to provide new public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act (ADA) that assist individuals with disabilities with transportation, including transportation to and from jobs and employment support services.” The New Freedom formula grant program aims to provide additional tools to overcome existing barriers facing persons with disabilities who seek integration into the work force and full participation in society, noting that “lack of transportation is a primary barrier to work for individuals with disabilities.” Thus, the New Freedom program “seeks to reduce barriers to transportation services and expand the transportation mobility options available to persons with disabilities beyond the requirements of the ADA.” Examples of public transportation services that go beyond the ADA requirements include expansion, spatially or temporally, beyond what is minimally required; the provision of same-day service; door-through-door service; vehicles and equipment that accommodate larger mobility aids; feeder services; accessibility improvements at non-key stations; and travel training. New initiatives, therefore, may include the purchase of accessible vehicles for accessible taxi, ridesharing and/or vanpooling programs; administration of new voucher programs; the support of new volunteer driver/aide programs; and development of new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation.

This Human Services Transportation Plan (HSTP) focuses on the JARC program and the New Freedom program, as Section 5310 is administered by the Illinois Department of Transportation (IDOT). As such, RTA has no direct role in the administration of this program; however, RTA has recommended to IDOT that as part of the process of considering Section 5310 funding requests from entities within the study area, that IDOT require or give more weight to applications that are consistent with strategies and needs identified in the Northeastern Illinois HSTP.

As the designated agency, RTA has the following administrative responsibilities in the management of both JARC and New Freedom programs:

- conducting an area-wide competitive selection process;
- certifying a fair and equitable distribution of funds resulting from the competitive selection process (However, the FTA specifically notes that “equitable distribution” refers to “equal access to, and equal treatment by, a fair and open competitive process” and that the result of such a process “may not be an ‘equal’ allocation of resources among projects or communities”. FTA guidance also states that it is possible that some areas may not receive any funding at the conclusion of the competitive selection process);
- certifying that each project selected was derived from a locally developed, coordinated public transit-human services transportation plan;
- certifying that local plans are developed through a process that included representatives of public, private, and non-profit transportation and human services providers and participation by the public;
- managing all aspects of grant distribution and oversight for sub-recipients receiving funds under this program; and
- submitting reports as required by FTA.
4.2 Regional JARC Project Experience

JARC funds were initially included in the 1998 Transportation Equity Act of the 21st Century (TEA-21) as a companion program to welfare reform. TEA-21 funded JARC with $750 million nationwide to be spent over five years between the federal fiscal years 1999 – 2003. The Chicago metropolitan area was well positioned to participate in the earliest rounds of JARC because discussions about local mobility needs and access to employment sites for low-income persons were already being discussed by the CATS (Chicago Area Transportation Study) Community Mobility Task Force. The first year of the JARC funding program resulted in 14 submitted proposals in the region of which five “first tier” projects were funded for a total of nearly $2.2 million. These five projects also included consolidated groups of projects, such as a series of smaller projects grouped into the Chicago Area Job Access and Transit Enhancement Plan. First year project sponsors and funding amounts included the RTA ($152,500), Chicago Housing Authority ($273,000) Chicago Area Job Access and Transit Enhancement Plan ($1.5 million), African American Leadership Partnership ($150,000) and DuPage County ($119,000).

Although the Chicago region continued to receive JARC funding throughout TEA-21’s lifespan, there was increasingly less local control of how funds could be allocated due to Congressional earmarking. By FY 2003 the entire JARC program had become funded through discretionary or earmarked projects. Congressional earmarking continued until the passage of SAFETEA-LU which called for JARC funds to be apportioned by formula. An overview of historical JARC funding levels in the Chicago metropolitan region together with key project sponsors is provided in Figure 4-1.
The study team reviewed these projects to ascertain the key factors in the success of a program. Significant factors common to successful programs include the following:

- **Partnerships with transit service boards.** Service board access to financial, operational and management resources help ensured that new services or projects are supported as they build and sustain the momentum necessary for success.

- **Establish a broad base of funding support.** Local project sponsors must identify the remaining half of project costs (for operating projects), exclusive of fares or other revenues generated by the service. The most successful JARC projects in the Chicago region included services that were developed with a broad range of funding partners.

- **Support new services with strong marketing.** Marketing/promotional efforts to raise awareness especially among job seekers, job developers and job placement organizations, and to garner employer and community buy-in are essential.

- **Conduct on-going evaluation of service ridership/productivity.** Several successful projects evolved by tailoring services in response to user and sponsor feedback. Collecting timely information allows sponsors to track route success and progress and refine services as needed. Evaluation results also support marketing and outreach campaigns.
Other noteworthy strategies included the following:

- Shuttle services were more successful when they served a concentration of employers/employees. Generally, successful programs served a minimum of 3-4 major employers clustered within close proximity to each other and to the station. Service planners were most successful when they examined the commuting patterns of employees together with the concentration of employers to closely align shuttle use, hours of job site operations and existing rail schedules.

- Effective shuttle services also considered traffic congestion, distances from stations to job sites, and connections with other modes of transportation, and then examined the resulting total travel time required for the commute trip. Our research suggests that shuttle travel time less than thirty minutes in addition to the time on train, time to travel to originating station, and any connecting/waiting time are most effective; otherwise total commuting time is burdensome to the employee.

- Cooperation and collaboration between different sectors, transit, and job access-interested stakeholders are essential. An effective transportation advisory panel or committee that includes the interests of different sectors and interest groups in the region contributes significantly to project success. Likewise, involving customers in the design of JARC service also increases the chances of project success. Understanding and incorporating the expectations and priorities of the customer ensures the service is designed appropriately.

### 4.3 Regional Goals, Policy and Guidance

#### Federal Goals and Objectives

The goals of this HSTP that stem from federal regulations and policies are:

- To ensure that the HSTP fully complies with the SAFETEA-LU regulations and with the spirit and intent of the JARC and New Freedom programs as stated in the FTA guidelines to ensure an uninterrupted flow and appropriate level of JARC and New Freedom program funding to RTA for the region.

- To establish a framework by which proposed projects requesting JARC and/or New Freedom program funding can be elicited, evaluated and (within the constraints of the funding available for the region) funded through a competitive selection process that is fair and equitable, well-advertised, and inclusive.

- To ensure that the inventory of services, assessment of unmet needs, the menu of strategies to address those unmet needs, the prioritization of those strategies, and the process for eliciting, evaluating, and selecting JARC and New Freedom projects are derived from a public involvement effort that has effectively reached out to public, private, and non-profit transportation providers, human services providers and other stakeholders representing

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FTA notes that equitable distribution refers to equal access to, and equal treatment by, a fair and open competitive process. The result of such a process may not be an ‘equal’ allocation of resources among projects or communities. It is possible that some areas may not receive any funding at the conclusion of the competitive selection process. This means that in any year, there will not be a pre-allocation of funds earmarked for each county and/or for each or any service board.
persons with disabilities, older adults, and persons with low income, and the general public.

- To craft a plan that will encourage not only coordination among services supported by JARC and/or New Freedom program funding, but also coordination among the broad array of community transportation services in the seven-county region. Through the myriad benefits of coordination, the ultimate goal is to as efficiently as possible address the unmet needs of persons who rely on community transportation services.

- To ensure that the process for adopting the plan includes the endorsement of the Project Advisory Committee, which is composed of a group of stakeholders that includes representatives from the three service boards, the MPO, and human service agencies and advocacy organizations representing persons with disabilities, older adults, and persons with low income, and otherwise reflects broad geographic representation throughout the region.

**Regional Goals and Objectives**

Additional goals and objectives were voiced by members of the Project Advisory Committee in the course of developing evaluation criteria. These included the following:

- To ensure that proposed projects specifically address unmet needs identified in the HSTP.
- To ensure that project applications identify a local “hard” match.
- To ensure that proposals for new projects and proposals for the continuation or expansion of existing projects (that are successful or have made progress) be given equal weight.
- To give more weight to projects which address the most severe needs.
- To give more weight to projects that are regional in scope or otherwise involve multiple counties or jurisdictions.
- To give more weight to projects which are based on strategies identified in the HSTP.
- To give more weight to projects that reduce/minimize duplication of existing services and to projects that utilize or improve access to existing transportation services.
- To give more weight to projects which coordinate with existing public and private human service agency transportation providers or reflect partnerships with non-transit entities and/or private for-profit or non-profit carriers.
- To give more weight to projects that can be implemented quickly (thereby maximizing use of funding).
- To give more weight to projects which are sustainable after JARC/New Freedom funding is depleted, e.g., where local funding source(s) have committed funding for a longer term.
- To give more weight to projects that demonstrate cost efficiency in terms of unit cost of service output, of service consumed, and/or a unit cost reduction for service consumed.
- To give more weight to projects that will increase economic opportunities for persons with low income.
4.4 Project Selection Process

Proposed FFY 2007-2009 Schedule

The proposed schedule for the federal fiscal years 2007-2009, Figure 4-2, is depicted on the following page. The federal fiscal year (FFY) runs from October 1 through September 30. Therefore, federal fiscal year 2007 began on October 1, 2006 and runs through September 30, 2007. Funding for FFY 2007 must be obligated (funds that have been committed by contract to a specific project) within the year of apportionment plus two additional years. Therefore, FFY 2007 funds must be obligated by September 2009.

The schedule depicts each of the next three program years (FFY 2007 in red, 2008 in blue, and 2009 in green) culminating with the expiration of SAFETEA-LU. Once the HSTP is completed, the FFY 2007 program will begin, followed immediately by the FFY 2008 program. This will allow the region to “catch up” to the appropriate program year by the end of the FFY 2009 program. Each of the steps is described in more detail in the Program Process section following Figure 4-2.
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## Figure 4-2 FFY 2007-2009 Schedule

### FFY 2007-2009 Schedule

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<thead>
<tr>
<th>STEP</th>
<th>Action</th>
<th>Venue</th>
<th>Lead</th>
<th>FFY 2007</th>
<th>FFY 2008</th>
<th>FFY 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Creation of HSTP PAC</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Endorsement of HSTP PAC</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Adoption of HRTA Board</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Development of HSTP PAC</td>
<td>RTA</td>
<td>RTA</td>
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<td></td>
<td></td>
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<tr>
<td>5</td>
<td>Endorsement of HSTP PAC</td>
<td>RTA</td>
<td>RTA</td>
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<tr>
<td>6</td>
<td>Adoption of HRTA Board</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>7</td>
<td>Program Website launched + Updated</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Program Website application website + Updated</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>9</td>
<td>Program Management Plan (PMP) + Updated</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>10</td>
<td>Site and Program Evaluation</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Program Implementation Plan (PIP) + Updated</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Program Open House Held</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
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<tr>
<td>13</td>
<td>Applications Received</td>
<td>RTA</td>
<td>RTA</td>
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<tr>
<td>14</td>
<td>Screening of Follow-up on Applications Concluded</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Selection Criteria Applied / Program of Projects (POP) Developed</td>
<td>Selection Committee</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>16</td>
<td>Presentation of POP CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>17</td>
<td>Presentation of POP CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>18</td>
<td>Selection Committee Endorsed CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
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<tr>
<td>19</td>
<td>Populations of POP B</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>20</td>
<td>Presentation of POP CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>21</td>
<td>Selection of POP CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>22</td>
<td>Award letters and Applicant Instructions Issued</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Program of Projects entered into TIP CMAP</td>
<td>CMAP</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>24</td>
<td>Rejection of Applications Conducted</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Agreements Executed between RTA and recipient</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>26</td>
<td>FTA Grant Application Submitted</td>
<td>RTA</td>
<td>RTA</td>
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<td></td>
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<tr>
<td>27</td>
<td>Program Evaluation</td>
<td>Evaluated</td>
<td>RTA</td>
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<td></td>
<td></td>
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<tr>
<td>28</td>
<td>Review of Selection Criteria</td>
<td>Selection Committee</td>
<td>CMAP</td>
<td>B</td>
<td>CMAP</td>
<td>B</td>
</tr>
<tr>
<td>29</td>
<td>Program monitoring / reporting</td>
<td>RTA</td>
<td>RTA</td>
<td></td>
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</tr>
</tbody>
</table>

### LEGEND

- **PAC**: Project Advisory Committee
- **RTA**: Regional Transportation Authority
- **RTA Board**: RTA Board
- **IDOT**: Illinois Department of Transportation
- **CMAP**: Chicago Metropolitan Agency for Planning
- **CMAP Board**: CMAP Board
- **CMAP HS**: CMAP Human Services Committee
- **CMAP Trans**: CMAP Transportation Committee
- **CATS Policy**: CATS Policy Committee
- **Selection Committee**: Made up of 2 staff members each from RTA and CMAP, and 1 from IDOT

**FFY** 2007 Program  
**FFY** 2008 Program  
**FFY** 2009 Program

Federal Fiscal Year (FFY) dates:
- FFY 2007: Funding must be obligated by Sep, 2009
- FFY 2008: Funding must be obligated by Sep, 2010
- FFY 2009: Funding must be obligated by Sep, 2011
Program Process

The following proposed program process was developed based on the Federal and Regional Goals and Objectives described in Section 4.3. The initial steps for the FFY 2007-2009 program process are to develop, endorse and adopt the HSTP. It is expected that the HSTP will be fully developed and endorsed by the PAC by its July 30 meeting. Adoption of the HSTP by the RTA Board will take place on September 13, 2007.

Below is a brief discussion of the 19 steps of the process:

**Step 1** – The RTA will launch a comprehensive program website explaining all aspects of the programs including goals, eligible projects and activities, eligible applicants, selection criteria, timeline of the selection process, description of the selection committee, available funding, and local match guidelines.

**Step 2** – The program application will be developed to achieve consistency with the federal application and to provide the information necessary to evaluate the proposals in accordance with the selection criteria. The application will include sections for identification of a local cash match, line item detail for operating/capital funding, letters of support, and demographic information to address federal requirements.

**Step 3** – The RTA will update and submit the required Program Management Plan (PMP) to the FTA.

**Step 4** – The RTA will issue a Call for Projects utilizing the CMAP database that was used for the FFY 2006 program (the database includes over 3,500 organizations) and the database of contacts developed throughout the development of the HSTP. Links to the program website, the date of the open house, and the due date for the application will be included.

**Step 5** – A program open house will be held for prospective applicants and other interested parties to discuss program goals, eligible projects and activities, selection criteria, process timeline, local match guidelines, and the respective responsibilities of applicants when “partnering” with a RTA Service Board (direct recipient) or with a non-Service Board Provider (sub-recipient).

**Step 6** – Applications received will be organized into an RTA internal database for further processing.

**Step 7** – RTA staff will conduct an extensive screening process to ensure all information on the application is complete and accurate and will follow-up with applicants as needed.

**Step 8** – The RTA will consult with the FTA as necessary to confirm eligible projects and activities and to ensure that local match proposals are in-line with FTA expectations.

**Step 9** – The Selection Criteria that will be included in the Program Management Plan (PMP) will be applied to proposed projects by a Selection Committee made up of 5 individuals (2 from RTA, 2 from CMAP, and 1 from IDOT-Division of Public and Intermodal Transportation). Individuals on the Selection Committee will be knowledgeable about Northeastern Illinois and specialized transportation services. The Selection Committee will produce a proposed Program of Projects that
Coordinated Public Transit-Human Services Transportation Plan

REGIONAL TRANSPORTATION AUTHORITY

will be developed in accordance with the application of the selection criteria and the Program Management Plan.

**Step 10** – The proposed Program of Projects will be presented for information only to various CMAP committees, which will “endorse” the Program.

**Step 11** – The proposed Program of Projects will be presented to the RTA Board for adoption.

**Step 12** – Upon adoption of the Program of Projects by the RTA Board, award letters with detailed instructions will be forwarded to successful applicants.

**Step 13** – The RTA will submit the Program of Projects to CMAP for inclusion in the TIP.

**Step 14** – The RTA will invite each unsuccessful applicant to a separate debriefing session designed to assist the applicant in understanding why a particular project was not chosen.

**Step 15** – The RTA will work with successful applicants to execute appropriate agreements. In accordance with Federal Transit Administration regulations, the Service Boards are eligible to be direct recipients of JARC and New Freedom funds and as such can enter into supplemental agreements with the RTA and apply directly to the FTA. Non-Service Board successful applicants who are not partnered with a Service Board are considered sub-recipients and will enter into a grant agreement with the RTA.

**Step 16** – Once all appropriate agreements are executed, the RTA will submit the program year grant application to the FTA.

**Step 17** – Once the RTA grant application is approved by the FTA, sub-recipients may initiate their projects. Service Boards that act as direct recipients may initiate projects once their applications are approved by the FTA or may consider initiating projects prior to FTA approval by exercising the pre-award authority available to them as a direct recipient.

**Step 18** – The Selection Committee, in concert with the CMAP Human Services Committee, will review the Selection Criteria to identify any areas that need clarification or revisions for the following year’s program. Members of the Project Advisory Committee will be invited to attend and offer input.

**Step 19** – RTA staff is in the process of developing monitoring and reporting procedures for all successful applicants. This will include frequent contact between the RTA and applicants to ensure projects remain on schedule. There will also be an ongoing program effort to identify and document the circumstances of all projects that are implemented.

**Evaluation Criteria**

The set of evaluation criteria, shown in Figure 4-3, was developed based on the federal requirements and on the goals set forth in Section 4.3. It was further refined based on input from the Project Advisory Committee. These proposed criteria will be used in ranking project applications for projects applying for JARC (FTA Section 5316) funding and/or New Freedom (FTA Section 5317) funding. These criteria, however, are subject to further review and refinement to assure consistency with the Program Management Plan (PMP) and the RTA JARC/New Freedom
Application that were under development at the time this plan was finalized. The final version of the PMP, criteria, and application will be made available to prospective applicants and posted to RTA’s website.

The criteria will not be used for Section 5310 project applications, as IDOT administers the 5310 program. However, projects that also address unmet needs of older adults will be favorably considered for 5316 and 5317 funds via the awarding of additional points.

The evaluation criteria are split into 5 sections (A through E) as follows:

Section A: Application Pre-Requisites
Section B: Evaluation Criteria that Apply to Both JARC and New Freedom Projects
Section C: Evaluation Criteria that Apply to JARC Projects Only
Section D: Evaluation Criteria that Apply to New Freedom Projects Only
Section E: Extra Bonus Criteria

Each criterion in Sections B through E has a point value. The relative point values among the various criteria were derived based on local input, and especially the input of the Project Advisory Committee. For most of these criteria, the full point value is awarded or not. For other criteria, there is a sliding scale of points, depending either on the degree to which a criterion is met or based on a comparison of proposals.

Both new projects and existing and operational and capital projects have the potential to “earn” the same maximum number of points (300, including extra bonus points).

Once all applications are scored using the evaluation criteria, the Selection Committee will develop a preliminary Program of Projects.
## Figure 4-3 Proposed Evaluation Criteria

<table>
<thead>
<tr>
<th>Section A: Application Pre-Requisites</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Proposed New Freedom program project addresses unmet transportation needs of persons with disabilities seeking integration into the workforce and full participation in society.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b Proposed JARC program project addresses unmet transportation needs of Welfare recipients, eligible low-income persons and other individuals in urbanized areas seeking employment or employment-related activities in suburban areas.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Project application identifies and addresses an unmet need identified in HSTP.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>This should include (1) a description of the project (2) identification of the unmet needs (which is/are addressed by the project), (3) how the project will address the unmet need(s), e.g., in terms of serving new riders, a new area, a new day and/or times, a higher frequency, less advance notice, more driver assistance, etc.; and (4) an estimated quantification of benefits. Any additional obligations, e.g., the provision of ADA complementary paratransit as a result of implementing a new fixed bus route in a previously unserved area, should be noted.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Project application identifies one or more local funding sources and evidences that that source or sources is/are committed to supplying the necessary local match for the project for (at least) the duration of the project.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4 Project is consistent with FTA guidelines on eligible projects and activities.</td>
<td></td>
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</tbody>
</table>

*If all “Yes”, move to Section B. If one or more “No”, project is not eligible for funding.*

<table>
<thead>
<tr>
<th>Section B: Evaluation Criteria that Apply to Both JARC and New Freedom Projects</th>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Project provides a new service (1) where or when no other existing similar service is available; and (2) that links high concentrations of target population with key destinations, activity centers, or key sector employers (and/or concentrations of employers) where no such link previously was provided and at appropriate travel times.</td>
<td>0 or 20</td>
<td></td>
</tr>
<tr>
<td>1b Project expands on an existing successful pilot project or otherwise provides continued operating funding for a service which is already in operation.</td>
<td>0, 10 or 20</td>
<td></td>
</tr>
<tr>
<td><em>Existing project achieved projected ridership = 20 points;</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Ridership has increased (compared to pre-project ridership) but has not achieved projected ridership = 10 points</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Section B: Evaluation Criteria that Apply to Both JARC and New Freedom Projects

<table>
<thead>
<tr>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>0, 10 or 20</td>
</tr>
<tr>
<td>3</td>
<td>0, 5, 10, 20</td>
</tr>
<tr>
<td>4</td>
<td>0 or 20</td>
</tr>
<tr>
<td>5</td>
<td>0 or 20</td>
</tr>
<tr>
<td>6</td>
<td>0 or 20</td>
</tr>
<tr>
<td>7</td>
<td>0 or 20</td>
</tr>
<tr>
<td>8</td>
<td>0-20</td>
</tr>
<tr>
<td>9</td>
<td>0 or 10</td>
</tr>
<tr>
<td>10a</td>
<td>0-20</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Severity of need addressed by the project:</th>
</tr>
</thead>
<tbody>
<tr>
<td>No such service/linkage/coordination currently exists in area = 20 points</td>
</tr>
<tr>
<td>Service/linkage/coordination exists but not in time period = 10 points</td>
</tr>
<tr>
<td>Service/linkage/coordination exists for area/time period but not for specific trip purposes and/or specific programs = 10 points</td>
</tr>
<tr>
<td>Service/linkage/coordination exists for area/time period and for most trip purposes/programs, but does not accommodate riders requiring high-level of service and/or same-day service = 10 points</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project employs one or more strategies that provide:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional service/linkage/coordination = 20 points</td>
</tr>
<tr>
<td>Multi-county service/linkage/coordination = 10 points</td>
</tr>
<tr>
<td>Multi-municipality (but intra-county) service = 5 points</td>
</tr>
<tr>
<td>No service/linkage/coordination beyond municipality or program = 0 points</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project employs one or more strategies included in the HSTP, or otherwise demonstrates innovation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project replicates strategy proven successful elsewhere within the region</td>
</tr>
</tbody>
</table>

| Project utilizes, or provides access to, non-duplicative public transportation resources. |
| Points will not be awarded to a proposed project that duplicates an existing service. Points may be awarded if proposed project duplicates a portion of the service but otherwise meets a specific unmet need not addressed by the existing service. Points will be awarded for a proposed project that utilizes all or part of existing services or provides access to these services, e.g., a shuttle service to a Metra station. |

<table>
<thead>
<tr>
<th>Project utilizes or coordinates with existing public and private human service agency transportation providers; or reflects partnerships with non-transit entities and/or private non-profit / for-profit operators.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Project starts providing services within a short time-frame.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within 6 months =20 pts; 6-12 months=10 pts; longer than a year=0 pts</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Project is sustainable past identified project period.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant-identified sources have committed to continue their levels of funding and have stated that their levels of support may increase if project is successful.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operations cost ranking on service output – measured in cost per vehicle service hour. (For operational projects only; rail, bus (fixed-route, flex, shuttle) projects and paratransit projects will be ranked separately.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lowest unit cost gets 20 points, next lowest 18 points, etc. If more than 10 applications, those ranked lower all get 0 points.</td>
</tr>
</tbody>
</table>
### Section B: Evaluation Criteria that Apply to Both JARC and New Freedom Projects

<table>
<thead>
<tr>
<th></th>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
</table>
| 10b | Operations cost ranking on service consumed – measured in cost per trip (For operational projects only; rail, bus (fixed-route, flex, shuttle) projects and paratransit projects will be ranked separately.)
   - Lowest unit cost gets 20 points, next lowest 18 points, etc. If more than 10 applications, those ranked lower all get 0 points. | 0-20 |
| 11a | Ranking of cost efficiency improvements – measured in terms of reduced cost per trip (For capital projects that have a direct impact on operations cost. Rail, transit (fixed-route and flex) projects and paratransit projects will be ranked separately.)
   - Highest reduction of unit cost gets 20 points, next highest 18 points, etc. If more than 10 applications, those ranked lower all get 0 points. | 0-20 |
| 11b | Ranking of other cost/benefits – measured in terms of cost per severity of need addressed, using point values from #2 of Section B. (For capital projects only. Rail, transit (fixed-route and flex) projects and paratransit projects will be ranked separately.)
   - Lowest unit cost gets 20 points, next lowest 18 points, etc. If more than 10 applications, those ranked lower all get 0 points. | 0-20 |
| 12 | Agency and/or agency contractor(s) qualifications and experience (including key personnel) demonstrate that they have the technical and managerial capabilities and experience to conduct the project / operate the service.
   - Qualifications and experience of agency / contractors (5 pts)
   - Qualifications and experience of key personnel (5 pts) | 0, 5 or 10 |
| 13 | Project promotes likely economic opportunities for persons with disabilities and/or persons with low income. | 0 or 20 |
| Subtotal – Section B | | 240 (max) |
Utilize Section C for JARC applications and Section D for New Freedom applications

<table>
<thead>
<tr>
<th>Section C: Evaluation Criteria that Apply to JARC Projects Only</th>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Estimated number of (entry level / lower wage) jobs accessed as a result of the project. <em>(Rail, transit (fixed-route and flex) projects and paratransit projects will be ranked separately.)</em></td>
<td>0-20</td>
<td></td>
</tr>
<tr>
<td>Highest number gets 20 points, next highest 18 points, lowest gets 2 points. If more than 10 applications, those ranked lower all get 0 point.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal – Section C</td>
<td>20 (max)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section D: Evaluation Criteria that Apply to New Freedom Projects Only</th>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Estimated number of persons with disabilities served as a result of the project. <em>(Rail, transit (fixed-route and flex) projects and paratransit projects will be ranked separately.)</em></td>
<td>0-20</td>
<td></td>
</tr>
<tr>
<td>Highest number gets 20 points, next highest 18 points, lowest gets 2 points. If more than 10 applications, those ranked lower all get 0 point.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtotal – Section D</td>
<td>20 (max)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Section E: Extra Bonus Criteria</th>
<th>Points Available</th>
<th>Points Assigned</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Project also addresses unmet needs of older adults</td>
<td>0 or 10</td>
<td></td>
</tr>
<tr>
<td>2 Project applications include letters of support from key stakeholders</td>
<td>0 or 10</td>
<td></td>
</tr>
<tr>
<td>Subtotal – Section E</td>
<td>20 (max)</td>
<td></td>
</tr>
</tbody>
</table>
Coordinated Public Transit-Human Services Transportation Plan

Connecting Communities through Coordination

Appendices

September 2007

Submitted by:

in association with:

RLS & Associates
Res Publica Group
MDS, Inc.
Nelson Development
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Appendix A Public Involvement Effort

A.1 Summary of Public Involvement Effort

Federal transit law, as amended by SAFETEA–LU, requires that projects selected for funding under the Job Access Reverse Commute and New Freedom programs be “derived from a locally developed, coordinated public transit-human services transportation plan” and that the plan be “developed through a process that includes representatives of public, private, and non-profit transportation and human services providers and participation by members of the public.”

The Federal Transit Administration (FTA) suggests the following as potential tools and strategies to involve various stakeholders who can provide insights into local transportation needs, and assurance that their opinions will be considered in the outcome of the development of the coordinated plan document:

- Community planning session
- Self-assessment tool
- Focus groups
- Survey
- Detailed study and analysis (inventories, interviews, GIS)

Adequate outreach should be made to allow for participation, and “the lead agency convening the coordinated planning process should document the efforts it utilized, such as those suggested above, to solicit involvement.”

The RTA, as the designated recipient of FTA JARC and New Freedom funding in the study area, is responsible for certifying that participation requirements have been met. Hence in preparing this report, the goal is that the inventory of services, assessment of unmet needs, the menu of strategies to address that unmet need, the prioritization of those strategies, and the process for eliciting, evaluating, and selecting JARC and New Freedom projects all are subject to scrutiny from a range of stakeholders as part of a comprehensive Public Involvement Effort (PIE). This PIE has involved the creation of a Project Advisory Committee (reflective of both the geographic and target communities) to review and comment on all deliverables. The public involvement program includes stakeholder interviews, workshops, focus groups, press releases, and a dedicated website that provides information about the study and elicits feedback from the general public.

This planning effort has included extensive public involvement. The public participation effort made use of the United We Ride framework for the public participation process. The United We Ride program is a federal initiative undertaken by eight branches of the government to facilitate the coordination of community transportation services.

1 Page V-1, FTA Circular 9050.1 The Job Access and Reverse Commute (JARC) program guidance application instructions, May 1 2007

2 Chapter V - Section 2, Item d, ibid.

3 Page V-7, ibid.
The table below is a summary of the Public Involvement Effort (PIE) undertaken throughout the various tasks of the planning exercise. Further, a short description of each component of the PIE is provided in accordance with the FTA recommendations detailed above.

<table>
<thead>
<tr>
<th>Chapter</th>
<th>PIE Component</th>
<th>Dates</th>
<th>Description</th>
</tr>
</thead>
</table>
| 2       | Project Advisory Committee (PAC)       | January – July 2007 | • 20 members  
• 6 meetings  
• Oversees PIE process |
| 3       | Stakeholder meetings and interviews    | January – February 2007 | • 69 interviews in 7 counties  
• Organizations represented range of target constituencies  
• Provided information on existing services and coordination efforts |
| 4       | Workshops                              | April 2007          | • 8 workshops across 7 counties  
• Solicit public feedback and ideas |
| 5       | Focus Groups                           | June 2007           | • 6 meetings with different organizations serving three target constituencies |
| 6       | Public Announcements                   | February – June 2007 | • RTA Website  
• RTA Press Releases  
• Media Coverage |
| 7       | Contact Database                       | Ongoing             | • 1,264 individuals listed  
• Data sorted by target population |
A.2 Project Advisory Committee

A Project Advisory Committee (PAC) was created to include senior-level policy and decision makers from the seven counties included in the scope of the study, as well as those from advocacy/service organizations that reflect the three target populations (elderly, disabled, and low-income).

The PAC served as a sounding board for ideas and strategies that are developed through the public participation process.

In addition to attending monthly meetings, the goals of forming the PAC were to:

- Provide the project team with counsel and guidance throughout the project
- Assist in reaching key individuals who represent or provide services to the target populations, transportation service operators, and advocacy groups
- Provide county-specific guidance for those areas
- Offer recommendations on public transit-human services transportation coordination and assist with awareness-building efforts to drive participation at public workshops

The process for adopting the plan included the endorsement of the PAC.

The 20 members of the PAC are listed below, along with a meeting schedule and Minutes of those meetings.
<table>
<thead>
<tr>
<th>Member</th>
<th>Organization</th>
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<tbody>
<tr>
<td>Bill Baltutis</td>
<td>TMA of Lake-Cook</td>
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<tr>
<td>Virginia Chandler</td>
<td>Metra</td>
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<tr>
<td>Tom Chefalo</td>
<td>Lake County</td>
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<tr>
<td>Dia Cirillo</td>
<td>Work, Welfare &amp; Families (Center for Tax and Budget Accountability)</td>
</tr>
<tr>
<td>Patricia Douherty-Wildner</td>
<td>Community Economic Development Association of Cook County (CEDA)</td>
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<tr>
<td>Susan Friend</td>
<td>South East Association for Special Parks and Recreation (SEASPAR)</td>
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<tr>
<td>Jacky Grimshaw</td>
<td>Center for Neighborhood Technology (CNT)</td>
</tr>
<tr>
<td>Elsa Gutierrez</td>
<td>Chicago Transit Authority (CTA)</td>
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<tr>
<td>Erica Interrante</td>
<td>Illinois DOT (IDOT)</td>
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<tr>
<td>Mary Keating</td>
<td>DuPage County</td>
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<tr>
<td>Steve Lazzara</td>
<td>Will County</td>
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<tr>
<td>Chris Manheim</td>
<td>McHenry County</td>
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<td>Walt Meyers</td>
<td>Northeast Illinois Area Agency on Aging</td>
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<td>Lynn O'Shea</td>
<td>Kane County Association for Individual Development (AID)</td>
</tr>
<tr>
<td>Russell Pietrowiak</td>
<td>Chicago Metropolitan Agency for Planning (CMAP)</td>
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<tr>
<td>Dave Snell</td>
<td>Pace</td>
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<tr>
<td>Karen Tamley</td>
<td>Mayor's Office for People with Disabilities (MOPD)</td>
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<td>Kerwin Terry</td>
<td>Council for Jewish Elderly</td>
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<tr>
<td>David Thigpen</td>
<td>Chicago Urban League</td>
</tr>
<tr>
<td>Jeff Wilkins</td>
<td>Kendall County</td>
</tr>
</tbody>
</table>

**Meetings**

- January 31, 2007
- February 26, 2007
- March 26, 2007
- May 21, 2007
- June 25, 2007
- July 30, 2007
January 31, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members

- Chris Manheim, McHenry County
- Dave Snell, Pace
- Dia Cirillo, Work, Welfare & Families (a division of the Center for Tax and Budget Accountability)
- Pat Douherty-Wildner (via phone), Community Economic Development Association of Cook County (CEDA)
- David Thigpen, Chicago Urban League
- Elsa Gutierrez, CTA
- Natasha Holmes, IDOT
- Jacky Grimshaw, Center for Neighborhood Technology
- Jeff Wilkins, Kendall County
- Karen Tamley, Mayor’s Office for People with Disabilities
- Steve Lazzara, Will County
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Russell Pietrowiak, CMAP
- Susan Friend, South East Association for Special Parks and Recreation (SEASPAR)
- Tom Chefalo, Lake County
- Virginia Chandler, Metra
- Walt Meyers, Northeastern Illinois Area Agency on Aging

Others

- Will Rodman, Nelson\Nygaard Consulting Associates
- Bethany Whitaker, Nelson\Nygaard Consulting Associates
- Dave Bayless, Res Publica Group
- Jay Ciavarella, RTA
- Barbara Lesser, RTA

1. Background

Jay Ciavarella from RTA thanked everyone attending the meeting, noting that 18 of the 20 committee members were present. He introduced himself as the project manager and encouraged committee members to introduce themselves, discuss their respective roles, and relationship to transportation coordination. Patricia Douherty-Wildner joined the meeting by phone.

2. Work Program & Scope

Will Rodman from Nelson\Nygaard discussed the federal context and framework for the project, presented the work program and outlined individual project steps, except for public involvement. Will said the three main work products that would be produced as a result of this study include: 1) an assessment of existing gaps and redundancies in the existing services; 2) strategies to address
gaps and redundancies; and 3) goals and evaluation criteria for services and project funding. Will emphasized that one of the project goals was to develop a clear set of criteria so funding applicants will know exactly how their projects will be evaluated. This criteria will include the extent to which identified strategies address identified gaps and redundancies.

Dave Bayless from Res Publica introduced the public involvement elements of the project, which includes an extensive set of stakeholder interviews, county level workshops, a website and press releases. There will also be six “theme based” focus groups. Themes will emerge from the analysis, especially after Task 4, the needs assessment.

3. Project Advisory Committee Roles and Responsibilities

Will outlined the roles and responsibilities of the Project Advisory Committee emphasizing that they will be called upon to provide input, guidance and council throughout the project and that he wants the final product to be their plan, reflecting local comments, input and consideration.

One of the key roles of the Committee will be to review the products produced by the consultant team. The anticipated process is for the consultant team to produce deliverables to the RTA, the RTA will review briefly and distribute to the Committee 1-2 weeks in advance of a committee meeting for discussion at the meeting.

It was also noted that the Project Advisory Committee will be a key resource for planning the public outreach as well as finding and encouraging participation at the events. Several of the Committee members have already helped identify individuals and organizations to be interviewed or surveyed.

Dave Bayless also noted that the PAC members will be called upon to suggest recommended venues for the workshop sites. Will Rodman added that the United Way of Metropolitan Chicago has offered to host the workshop in Chicago.

4. Project and Committee Meeting Schedule

It was noted that this coordination study requires a significant amount of work in a short time line; ideally the project would have an 18 month timeline, but the study needs to be completed in six months. This will allow our region to access the available federal funds again next year. This fact has influenced how the work program is organized; it also influences expectations for the Project Advisory Committee, including the need to meet monthly.

The Committee agreed to meet on the last Monday of every month from 2:00 – 3:30 p.m., noting one meeting may fall on a public holiday (Memorial Day). The Committee also agreed to meet downtown. CMAP offered to host the meeting at their facility.

5. Comments and Questions from Committee Members

Several questions were raised during the last part of the meeting:

- It was noted that committee members may submit comments to the RTA (Jay) if they are unable to attend meetings in person. Jay will voice those comments for the member(s) not able to attend.
• Project visioning, including creation of project goals and expectations will take place during a couple of key steps in the project, after the needs assessment is completed and strategies are explored. The team also expects that some visioning will occur during the county-level workshops and during the best practice/national model review.

• Another topic that was raised was if there would be discussion of expectations of baseline mobility for special populations. The consultants explained that the end product of the study is not a service plan but rather a process for the application, approval and distribution of plans and funding that will meet the needs identified in the study.

• A key objective and requirement of the study is that recommendations are tied to local objectives and reflect local circumstances and need. This will be accomplished by analyzing the demographics in terms of both absolute number and density of targeted populations (i.e., seniors, persons with disabilities, and persons with limited incomes) and an analysis of where people are traveling and superimposing this information with the perception of needs and gaps gained through stakeholder interviews and community outreach.

• The end goal of the project is to stratify needs and strategies as much as possible – thematically, geographically, by target populations – to help grant applicants know what they need to address and how their application will be evaluated – not only on its own merits but also in comparison with other projects and counties.

• The needs assessment will include both abstract needs and barriers/obstacles to achieving those needs.

• Barriers will be examined in terms of coordination in general as well as in terms of specific relevant examples that have regional applications.

• All data, materials, reports, processes, etc. will be available to the Illinois DOT so that downstate projects and efforts can be coordinated with this study.

• Locally, stakeholder interviews, county-level workshops and the Project Advisory Committee meetings will be the primary vehicles for coordination between county-level human service and transportation organizations.

• The consultant teams’ objective is that no one calls the RTA and says “I didn’t have an opportunity to comment or provide input to this project”.

• There will be a general feedback form on the project website.

• Project materials will be made available in Spanish and the consultant team is open to including the Spanish speaking population in other ways, such as focus groups.

• Preliminary schedules for the county level workshops will be distributed sooner rather than later to provide ample time to plan and organize.

6. Meeting Wrap Up
Jay wrapped up the meeting right on time, noting that this first meeting was the easiest.
February 26, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members

- Chris Manheim, McHenry County
- Dia Cirillo, Work, Welfare & Families (a division of the Center for Tax and Budget Accountability)
- Pat Douherty-Wildner, Community Economic Development Association of Cook County (CEDA)
- Elsa Gutierrez, CTA
- Kerwin Terry, Council for Jewish Elderly
- Natasha Holmes, IDOT
- Steve Lazzara, Will County
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Susan Friend, South East Association for Special Parks and Recreation (SEASPAR)
- Tom Chefalo, Lake County
- Virginia Chandler, Metra

Others

- Will Rodman, Nelson\Nygaard Consulting Associates
- Dave Bayless, Res Publica Group
- Jay Ciavarella, RTA

1. Welcome

Jay Ciavarella from RTA welcomed those in attendance and explained that the purpose of the meeting was to discuss progress with the provider survey, the status of Technical Memorandums 3 and 4, Technical Memorandum 2, the upcoming workshops, and the direction of the selection process and criteria for future programs.

2. Update on Provider Survey

Will Rodman from Nelson\Nygaard updated the PAC on the provider survey, noting that a total of 139 completed surveys have been returned out of a total of 337. This represents a response rate of 41%, consistent with expectations. Will noted that the survey responses are being analyzed and will form the basis of the inventory to be provided in Technical Memorandum 3. The inventory will also include other sources, including data and information collected from Pace, the counties, and the University of Illinois at Chicago.
3. Update on Technical Memorandums 3 and 4

Will explained that Technical Memorandum 3 would include an inventory of services broken down by county. The deliverable will also include a profile of each service, including information on service area, project sponsor, target population, and other data. Technical Memorandum 4 will include demographic information and a needs assessment broken down by county and by the three target populations. The needs assessment will include information gleaned from stakeholder interviews, discussions with PAC members, and others. Will noted that the completion of these two deliverables will allow Nelson\Nygaard to identify gaps and redundancies in services for the target populations, to be completed as part of Technical Memorandum 5.

The PAC raised several questions on how the information in Technical Memoranda 3 and 4 would be portrayed. There was a discussion that involved several PAC members requesting that future deliverables reflect the use of fixed service by the targeted populations (low income, older adults & people with disabilities). Many members mentioned that it was not apparent, in Technical Memorandum 2, that fixed bus and rail route service is a viable option currently being used and can be part of the solution/recommendation for the transit gaps to be identified. Will noted that Nelson\Nygaard is currently reviewing different methods to portray the information on maps but that the ultimate focus will be on comparing the inventory of services with the needs assessment in order to come to some conclusions on what gaps and redundancies exist. This will be accomplished through tabular and spatial analysis, or a combination of both.

4. Discussion of Technical Memorandum 2

Will explained that the purpose of Technical Memorandum 2 was to document the history of coordination in the region. The intent is to “get a lay of the land”, or overview of the region’s efforts to date. The PAC offered several comments on the draft:

- It was noted that the discussion of the 2006 selection process and criteria was premature and did not belong in this deliverable. In addition, the PAC requested that Nelson\Nygaard elaborate more on past JARC projects to gain a better understanding of what has or has not been successful. It was agreed that these two points would be covered in the deliverable for Task 8, tentatively scheduled for completion in June.

- It was noted that in some cases, the document may overstate the progress of coordination in certain areas of the region. The consultant agreed to review the text and revise appropriately.

- There was no reference to the efforts of the Illinois Coordinating Committee on Transportation (ICCT) and the consultant agreed to include a section in the introduction.

- Community colleges need to be part of the analysis (as demand generators) in future deliverables.

- Some PAC members expressed the need to clarify this effort with other ongoing RTA initiatives, including Moving Beyond Congestion.

Jay reiterated the deadline for final written comments on Technical Memorandum 2 is Friday, March 2.
5. Workshops

Dave Bayless from Res Publica reiterated the goals of the upcoming workshops; to create awareness and understanding of the project, provide information about regional and national coordination experiences, share project findings, and to encourage input. A discussion ensued on the format of the workshops. Some PAC members expressed an interest in an “open house” setting, while others favored a more structured, or “workshop”, approach. PAC members noted that the format may be different depending on the county; as some areas are further ahead then others on coordination of transportation services. The need for gathering input from the general public was discussed and it was agreed this was necessary. PAC members agreed that the goal of the workshops should be to gather as much information into the ongoing planning process as possible and to explore the mobility needs of the target populations. Dave agreed to review the comments received and provide the PAC with a 1-2 page summary of the approach to be taken for the workshops.

6. Future Selection Process and Selection Criteria

Jay explained that this would be the first in a series of discussions with the PAC on these subjects. The approach is to continue the dialogue on this issue at every future PAC meeting. Jay noted that the RTA Board is interested in the progress being made on these issues and that a briefing is tentatively scheduled for June. Will requested that the PAC provide the RTA with some preliminary thoughts on four specific issues related to this topic; selection process, pre-requisites for applying, selection criteria, and weighting for selection criteria. The PAC raised a question on the Section 5310 program. Jay explained that, based on previous discussions with IDOT, the State will continue to administer the 5310 program. Applications for 5310 funding will be reviewed for conformity with the northeastern Illinois HSTP to ensure that applicants are making an effort to coordinate services and eliminate duplication of services.

7. Next Steps

Jay reiterated that final comments on Technical Memorandum 2 are due to the RTA by Friday, March 2. The next PAC meeting will be held on Monday, March 26 from 2:00 – 3:30 p.m. An agenda and materials for review will be sent to the PAC by March 21.
March 26, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members

- Chris Manheim, McHenry County
- Dave Snell, Pace
- Elsa Gutierrez, CTA
- Jacky Grimshaw, Center for Neighborhood Technology
- Jeff Wilkins, Kendall County
- Jennifer Smith, CEDA (for Patricia Douherty-Wildner)
- Kerwin Terry, Council for Jewish Elderly
- Steve Lazzara, Will County
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Russell Pietrowiak, CMAP
- Tom Chefalo, Lake County
- Virginia Chandler, Metra
- Walt Meyers, Northeastern Illinois Area Agency on Aging

Others

- Will Rodman, Nelson\Nygaard Consulting Associates
- Laura Peck, Res Publica Group
- Jay Ciavarella, RTA

1. Welcome

Jay Ciavarella from RTA welcomed those in attendance and explained that the purpose of the meeting was to discuss Technical Memoranda 3 and 4, the upcoming workshops – content and logistics, and the direction of the selection process and selection criteria for future programs. Jay also explained that up until now, deliverables have focused on identifying existing conditions and they thus lacked analysis. Beginning with Technical Memorandum 5, the deliverables will focus more on analysis in order to develop recommendations and strategies. The deliverables will also be shorter in length.
2. Discussion of Draft Technical Memorandum 3

Will Rodman from Nelson\Nygaard explained to the PAC that Technical Memoranda 3 and 4 are interim products to get to the unmet needs. Both memos have their shortcomings due to the available data. With regard to receiving comments from PAC members on the memoranda, Will made it clear that the RTA is looking only for significant items that were missed. For example, if something has changed dramatically from a 3 year-old report, they would like to know that. They are not looking for ridership figures that may differ slightly from those reported or a service start and end time that is slightly different. Will also explained that they chose to map things the way they are only for analytical purposes. He stated that the maps are interim tools, moving forward to Task 5.

The purpose of Technical Memorandum 3 is to document what community transportation services are available where and when, and for whom and for which trips. There were 10 sources – 4 sources provided general service characteristics, generational and service statistics, funding sources, revenue and cost. Most of the other sources provided a general description or just listed the service. Each chapter is made up of:

- An introduction to the county, a list of services and service profiles by category and summaries
- 2 maps showing weekday/weekend availability of services
  - Pace routes and ADA paratransit service areas
  - Metra stations
  - In Cook County they show the CTA service area as a whole
- 1 regional map of human service agency services
  - listed county-wide and regional services, but did not map
  - sub-county services are mapped

Several themes were highlighted including the observation that seniors and persons with disabilities have access to more services than persons with low incomes. However, many services have fairly limited service areas.

PAC members offered several comments on the draft. It was noted that there is a tremendous amount of information in these memoranda and they were curious as to what information is useful and what is not. Will explained that the collection of this data was necessary to make recommendations on ways to better coordinate service. The PAC also raised the possibility of summarizing spending for service so that the region is able to say, “at a minimum” we spend this amount on service. It was agreed this would be included in the revised document. Dave Snell mentioned that the ADA buffer on weekends appears to be the same as that on weekdays and Will agreed to investigate the maps in question. Kerwin Terry raised the issue of Medicaid providers being included in the inventory. Will and Jay agreed to work together to request information again from First Transit (the consultant team was not successful in their repeated attempts to get this information).

Jay asked that final comments from PAC members be submitted directly to the RTA by April 6, 2007.
3. Discussion of Draft Technical Memorandum 4

Will Rodman stated that the purpose of Technical Memorandum 4 is to document trip origins and destinations of the three target populations: persons with disabilities, older adults and persons with low incomes. The maps per county are based on census data. They also used data available from CMAP to portray 10 year projections for persons with disabilities and older adults. Will clarified that these would be 5 year projections, meaning that the projections would take us to 2010, noting that the horizon of SAFETEA-LU is 2009.

One of the main findings that is consistent across the region and the country as a whole is that the older adult population is growing fast. Will also stated that seniors over 65 are increasingly more mobile, their demand for community transportation services will increase dramatically, and short of an infusion of money, the coordination of services to stretch the funding dollar is no longer just a smart idea, it’s an essential strategy.

For trip destinations, 3 sources were used:

- ADA trip destinations where automated trip data was available – CTA service area, N/S/W Cook, DuPage and Lake Counties.
- Other destinations came from a mixture of the survey, stakeholder interview and web-listed searches
- Employer data from the regional Workforce Investment Boards (WIB) – labor classifications that employ low and semi-skilled labor listed by city and employers that employed 250+ total employees.

There were two limitations. The data was not available by time of day like the ADA trips are. These destinations were listed on county-based maps, often straddling other counties to display trip destinations beyond county boundaries. Will also noted that there is a summary chapter at the end of the memo, which lists observations by county.

Mary Keating stated that since the 2000 census there has been a 50% increase in individuals living below the poverty line in DuPage County and it’s now a very different landscape. Will stated that they will include projections for each county and that they will add a notation, or some sort of disclaimer, at the top of the memo warning of this discrepancy.

Other members noted that there was no congruency with the listing of large employers. Russell Pietrowiak mentioned that he can add in the retail component from the NIPC forecast. Will also noted to please send in comments regarding local flavor, since they are not aware of some of these deeper issues happening in each county. PAC members were encouraged to supply information and data on destinations in their respective counties, including but not limited to hotels, industrial parks, and shopping malls.

Mary indicated that right now in DuPage County, there is very little unmet need, due in large part to the success of Ride DuPage. She did stress that this may change unless a sustainable funding stream can be obtained for the service. Jay directed the consultant team to stress this point up front in the next deliverable, Technical Memorandum 5, which will compare the inventory of services with the trip patterns of the three target populations.
Jay asked that final comments from PAC members be submitted directly to the RTA by April 6, 2007.

4. Workshops
Laura Peck from Res Publica Group gave a summary of the logistics for the County Workshops. She let all PAC members know that each of the workshops have been coordinated and scheduled and locations are confirmed and listed on the handout. She explained that each of the workshops will be split into two halves. The first half will be the stakeholder portion and the second half will be a public participation portion in the form of an open house. The duration of each of these sections depends on each county and is noted on the sheet, as well.

Laura noted that there are 3 workshops within Cook County – one in the City of Chicago, North Cook County and South Cook County – one form letter went to all organizations in Cook County asking them to choose one of the three workshops to attend. Close to 600 invitation letters went out on Friday March 23, 2007 and Res Publica is coordinating the RSVPs and is already starting to get responses. The Mayor’s Office for People with Disabilities and the Office on Aging sent the invitation letter to their listserves on Tuesday March 27.

Laura again requested mailing lists for McHenry County and DuPage County. Laura will work with Chris Manhein and Mary Keating to get more invitation lists. Jay requested that PAC members attend at least one of the workshops and there was a good response from those in attendance.

Jay mentioned that the RTA will arrange for second language interpreters, if necessary. Will Rodman explained that the content of the stakeholder workshops is to verify the findings of Tasks 3 and 4 and to elicit good ideas for strategies to coordinate, or further coordinate, services. There will be a power point presentation during both the stakeholder and open house portions.

5. Future Selection Process and Selection Criteria
Jay stated that the PAC’s homework will be to review (and rank, where noted) the 2007-2009 selection process and criteria, which will be emailed to the PAC.

6. Next Steps
Jay reiterated that final comments on Technical Memoranda 3 and 4 are due to the RTA by April 6 and the deadline for comments on the selection process and criteria handout is April 13. The next PAC meeting will be held on May 21.
May 21, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members

- Dave Snell, Pace
- Elsa Gutierrez, CTA
- Jacky Grimshaw, Center for Neighborhood Technology
- Jeff Wilkins, Kendall County
- Jennifer Smith, CEDA (for Patricia Douherty-Wildner)
- Natasha Holmes, IDOT
- Steve Lazzara, Will County
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Russell Pietrowiak, CMAP
- Tom Chefalo, Lake County
- Walt Meyers, Northeastern Illinois Area Agency on Aging
- Jason Osborn, McHenry County (for Chris Manheim)
- Dia Cirillo, Work, Welfare & Families, a division of the Center for Tax and Budget Accountability
- Susan Friend, SEASPAR
- Karen Tamley, MOPD

Others

- Will Rodman, Nelson\Nygaard Consulting Associates
- Erica Interrante, IDOT
- Jay Ciavarella, RTA
- Joe Voccia, RTA

1. Welcome

Following introductions, Jay Ciavarella from RTA welcomed those in attendance and announced that the RTA has re-aligned existing staff resources to more effectively manage and administer both the 2006 and future JARC/NF programs. Jay also noted that Technical Memoranda 3 and 4 will be posted to the project website by the end of the week and will remain as drafts. Any feedback received will be folded into the final HSTP.
2. Summary of Workshops and Focus Group Plan

Will Rodman from Nelson\Nygaard summarized the workshops held in April. A total of 8 workshops were held with about 140 people attending. Input was used to refine Tech Memos 3 and 4, and was also incorporated into the Tech Memo 5/6. Will also thanked the PAC members who were able to attend the workshops. Will noted that all workshop attendees have been entered into the project database that will be used in further outreach efforts. Currently, there are 1262 contact names in the database. Will announced that the Nelson\Nygaard team is planning to hold 6 focus groups of customers from the three target populations and covering different topics. Input will be used to verify Task 5 findings on unmet needs, and to elicit customer reactions to specific strategies identified in Task 6. The focus groups will be held during the week of June 4.


Jay walked the PAC through the handout and explained that the PAC will have several chances to comment on the process and criteria. Jay noted that the draft was developed from comments received following some brainstorming that occurred during the two previous PAC meetings. Jay first explained the process and highlighted the fact that the RTA will be striving to do more outreach at both the beginning and end of the process. The intention is to avoid some of the issues that arose with the 2006 program. Jay also mentioned that the process and criteria focused on JARC and New Freedom projects, and that IDOT would still be responsible for Section 5310 grants. Jay also suggested that IDOT develop a criterion for review of Section 5310 grant application originating in the seven-county region weighting more heavily applications that conform to the HSTP plan. The PAC asked for clarification on Step 7 and raised the possibility of the RTA conducting applicant presentations to describe their projects further. Jay responded that Step 7 will cover the follow-up that will be needed. Natasha Holmes noted that the process should include a step that adds the program of projects to the TIP. Jacky Grimshaw asked about the composition of the evaluation committee. Jay responded that the RTA is currently thinking that it will be a 5-person committee, comprised of two RTA staff, two CMAP staff, and one IDOT staff.

Will then explained the underlying methodology on how the criteria itself was developed, stating that it was developed from both stakeholder and PAC comments and a review of some other national practices. The PAC offered many suggestions that included:

- adding criteria or point values for projects that incorporate coordination – and in particular mobility management strategies;
- incorporating a Title VI screen;
- incorporating as a criterion severity of need;
- branching criteria for different types of projects (capital vs. operating);
- reducing the point value of service output and service consumed (B10 and B11); and
- eliminating the criteria focused on smaller budgets, but incorporating as a criterion non-quantifiable benefits (such as those that stem from nonservice-oriented projects).

The PAC also suggested that the consultant team run some of the 2006 applications through the criteria as a test.
Jay asked that comments on the handout from PAC members be submitted directly to the RTA by June 1, 2007. The handout will then be revised and distributed to the PAC in advance of the next meeting on June 25.

4. Discussion of Draft Technical Memorandum 5/6

Will summarized the content included in the Draft of Technical Memorandum 5/6. The document highlights service redundancies, gaps and unmet needs on a county-by-county basis, and offers relevant strategies for the region to pursue. Will pointed out that strategies were organized into coordination strategies, “other” strategies designed to improve the mobility of the three target populations, and IT strategies that support the above strategies. Jay asked that comments on Technical Memorandum 5/6 from PAC members be submitted directly to the RTA by June 1, 2007. The document will then be revised and posted to the project website as a draft. Mary Keating of DuPage County mentioned that, at first glance, the unmet need for DuPage County as identified in the report was in line with her view.

5. Next Meeting

Jay reiterated that final comments on the Selection Process and Criteria handout and Technical Memorandum 5/6 are due to the RTA by June 1. The next PAC meeting will be held on June 25.
June 25, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members

- Dave Snell, Pace
- Elsa Gutierrez, CTA
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Russell Pietrowiak, CMAP
- Walt Meyers, Northeastern Illinois Area Agency on Aging
- Dia Cirillo, Work, Welfare & Families, a division of the Center for Tax and Budget Accountability
- Susan Friend, SEASPAR
- Karen Tamley, MOPD
- Virginia Chandler, Metra
- Chris Manheim, McHenry County

Others

- Will Rodman, Nelson\Nygaard Consulting Associates
- Erica Interrante, IDOT
- Jay Ciavarella, RTA
- Joe Voccia, RTA

1. Welcome

Jay Ciavarella from RTA welcomed those in attendance and announced that following today’s meeting, there would be a final PAC meeting to be held on Monday, July 30. The RTA and Nelson\Nygaard will present the draft Plan for review and discussion at the meeting.

2. Summary of Focus Groups

Will Rodman from Nelson\Nygaard announced that 6 focus groups were held in early June. The focus groups were held throughout the region with 8 to 10 participants at each. The focus groups were targeted to elicit feedback and reactions to preliminary strategies contained in Technical Memorandum 5/6 and included groups for people with disabilities, older adults, low income individuals, and the Hispanic population. Will reported that the focus groups confirmed many of the strategies and reinforced some of the views expressed at the county-based workshops held in April. A detailed summary of the focus groups will be included in the final Plan.
3. Discussion of Draft Technical Memorandum 7/8

Will provided an overview of Draft Technical Memorandum 7/8. The first part of the draft focuses on regional policies and strategies. The second part of the draft includes recommendations for future program years. The regional policies and strategies are presented based on implementation timeframe; short term being 6-12 months and long term being 12 months or longer. An overview of the funding programs (Section 5316 JARC and Section 5317 New Freedom) is included along with an overview of past regional experience with JARC. Also included are regional goals, policy and guidance and the proposed process, project evaluation and selection criteria, all of which were derived from the Federal requirements and PAC input.

Will highlighted some of the goals presented in Chapter 6. He summarized the 5 key goals that stem from the federal regulations and indicated that the planning process being followed is in compliance:

1. Ensure the HSTP fully complies with SAFETEA-LU regulations
2. Establish a framework for a competitive selection process
3. Ensure that the HSTP was developed from a comprehensive public involvement effort
4. Encourage coordination among services supported by Section 5316 and 5317 funding but also among the broad array of community transportation services in the planning area
5. Ensure that the HSTP includes regional and target population representation input

Joe Voccia of the RTA highlighted some of the changes to the proposed process based on comments received on the document discussed at the May 21 PAC meeting. This discussion included matching requirements, Title VI strategies, and multi-year funding. Will highlighted some of the changes to the proposed selection criteria based on the previously distributed document. There were several specific comments on the criteria that were discussed. The RTA requested that additional comments and feedback be submitted by June 29.

4. Final Plan Outline / Remainder of Project Schedule

Jay distributed a one page project schedule and final plan outline. The details are provided below:

Remaining Project Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>June 29</td>
<td>Comments due to RTA on Draft Technical Memorandum 7/8</td>
</tr>
<tr>
<td>July 18</td>
<td>Draft Final Plan distributed to PAC</td>
</tr>
<tr>
<td>July 30</td>
<td>Final PAC Meeting</td>
</tr>
<tr>
<td>Aug. 3</td>
<td>Final comments due to RTA on Draft Final Plan</td>
</tr>
<tr>
<td>Aug. 13</td>
<td>CMAP Human Services Committee Meeting</td>
</tr>
<tr>
<td></td>
<td>• Presentation of Final Plan for information only (nonvoting)</td>
</tr>
<tr>
<td></td>
<td>• PAC members encouraged to attend</td>
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</tbody>
</table>
Coordinated Public Transit-Human Services Transportation Plan
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Sept. 13 Final Plan adopted by RTA Board of Directors

Final Plan Outline

1) Executive Summary
   - Compiled from all previous deliverables
   - Underlying goals are to meet FTA requirements for the development of the HSTP, and to provide meaningful guidance and direction to potential project sponsors seeking strategies and tools that will help improve mobility and coordination

2) Introduction
   - Compiled from all previous deliverables
   - Project summary, goals, scope and methodology, report organization

3) Overview of Study Area: Available Services and Needs Assessment
   - Compiled from Tech Memos 2-4 and 5/6
   - Assessment of available services, on-going coordination activities, existing available services (supplemented by appendix B), regional needs assessment, and identification of service redundancies, gaps, and unmet needs

4) Identification and Analysis of Relevant Coordination/Mobility Strategies
   - Compiled from Tech Memos 5/6 and 7/8
   - Coordination, mobility, and technology related strategies

5) Priorities for Implementation
   - Compiled from Tech Memo 7/8
   - Overview of Federal funding programs, regional experience with funding programs, proposed process, project evaluation, and selection criteria

6) Appendices
   - Appendix A: Documentation of all Public Involvement Efforts
   - Appendix B: Inventory of Available Services
   - Appendix C: List of Eligible Projects

5. Next Meeting
Jay reiterated that final comments on Draft Technical Memorandum 7/8 are due to the RTA by close of business Friday, June 29. The next PAC meeting will be held at the RTA on July 30.
July 30, 2007 PAC Meeting Minutes

Attendees

Project Advisory Committee Members
- Elsa Gutierrez, CTA
- Erica Interrante, IDOT
- Lynn O’Shea, Kane County Association for Individual Development (AID)
- Mary Keating, DuPage County
- Russell Pietrowiak, CMAP
- Tom Chefalo, Lake County
- Virginia Chandler, Metra
- Dia Cirillo, Work, Welfare & Families, a division of the Center for Tax and Budget Accountability

Others
- Jay Ciavarella, RTA
- Joe Voccia, RTA
- Natasha Holmes, IDOT
- Will Rodman, Nelson\Nygaard Consulting Associates
- Bethany Whitaker, Nelson\Nygaard Consulting Associates
- Dave Bayless, Res Publica Group

1. Welcome
Following introductions, Jay Ciavarella from RTA welcomed those in attendance and thanked everyone on the committee for their time and effort over the last eight months. Jay explained the meeting would start with an overview of the draft final Plan.

2. Discussion on Draft Final Plan
Will Rodman and Bethany Whitaker from Nelson\Nygaard presented the organization, format, and key highlights of the draft final Plan organization, appendices, and Executive Summary. Will explained how the findings from the different tasks and different technical memoranda “mapped” into the specific chapters of the Plan, and noted that the sections focusing on needs and strategies focused not on individual counties but rather the commonalities throughout the region. Will also mentioned that while there is still some subjectivity embedded in the criteria included in the Plan, the criteria is much more objective and detailed than that used in this past year’s process, and did reflect the PAC’s input and expressed objectives. He added that this criteria should be regarded by the PAC as an on-going work in progress, that it may be tweaked upon upcoming reviews by the FTA and RTA Board, and that it may be adjusted after the first cycle of proposal evaluations.

After this introduction, Jay opened the floor for PAC member comment on the Plan. One PAC member asked if the RTA will allow some flexibility in the selection process given that the criteria is new and may contain elements that under or overstate intended goals. Jay said while he
recognizes the process will not be perfect, he expects it to be an improvement over last year. He also added that there was no requirement for this process to be included in the HSTP, but the RTA felt strongly that the process and selection criteria should be a locally-driven product as well.

Jay and Joe Voccia explained that the RTA will be preparing a Program Management Plan (PMP). The HSTP is the big picture document and framework for the region, while the PMP provides the framework for implementing the program, and monitoring the progress of selected projects.

Joe led a discussion about Title VI requirements, how they relate to JARC and New Freedom funding, and how each of the service boards must look at their system as a whole to see how they each comply with these requirements. Joe noted that Title VI will be addressed in the PMP to ensure that the process is open and available to everyone and protects disadvantaged populations, and that JARC and New Freedom projects focus on these same populations. He also made the point that applicants for such funding will compete in an open process with equal access to funds, and that the RTA does not anticipate any Title VI issues connected with the HSTP.

There was also discussion about the use of volunteer services as in-kind match and if that is consistent with the PAC’s intention of encouraging the promotion of sustainable projects. Federal regulations make it clear that local match should be something you would otherwise have to pay for; thus the value of volunteer driver hours and any other non-reimbursed expense incurred by the volunteer drivers may be allowed. The RTA said they may consider using volunteer driver resources as matching resources as a demonstration project but this issue requires more research.

Another PAC member said they hope to continue this type of dialogue with lots of stakeholders at the table as the program is implemented.

3. Next Steps

Jay explained that comments on the draft final Plan are due on Friday, August 3. Key future dates for the project include:

- August 13 – RTA presents HSTP to CMAP Human Services Committee
- September 13 – HSTP goes to RTA board for adoption

If the plan is adopted, the RTA will move ahead on the schedule included in the Plan.

4. PAC Endorsement of the Plan

Jay said he wanted to give each PAC member a chance to provide final input into the planning process and asked if they personally endorsed the plan. PAC members went around the room and voiced their opinions. Each of the PAC members present endorsed the Plan.

Key comments on the study process and products included:

- Several individuals expressed appreciation for the planning process, saying it was very inclusive of a lot of different perspectives and voices. Others complimented the plan and planning process as objective, balanced and done well.
Several of the members liked how the document can also be used for future regional and county-based coordination planning. One individual noted that while the plan was a good resource, it might have included some more detailed information for each County.

One PAC member noted that the RTA did a good job getting the right people at the table. Another member was pleasantly surprised at how the PAC came together as “one voice” with a regional perspective, despite the varied constituencies represented.

Another member also expressed strong support for continuing to meet and to keep the dialogue going as the process is implemented. Jay noted that the RTA is currently reviewing some options.

5. Closing
Before the meeting adorned, IDOT presented a brief update on the statewide process.

Jay thanked everyone for attending the meeting as well as their participation and effort over the course of the project. Will also thanked the PAC members for their contributions and help throughout the project, adding that the Plan is a stronger document because of their input.
A.3 Stakeholder Meetings and Interviews

Key points gleaned from stakeholder interviews, organized by county, are summarized below.

Cook County

Interviewees

- Alice Segal, Director of Community Affairs, Anixter Center
- Wayne Kulick, Countryside Association for People with Disabilities
- Tony Paulauski, Executive Director, ARC of Illinois
- Oswaldo Rangel and Maria Talis, Pilsen One-Stop Center, Illinois Department of Employment Security
- Jonathan Lavin, CEO, Age Options
- John Robinson, Paratransit customer, HUD, RTA Advisory Board, Illinois Center for Rehab Advisory Board, Illinois Center for Rehab foundation
- Debra Strickland, Director, Developing Communities Project
- Chad Higgins, Case worker, Goodwill of Metro Chicago
- Barbara Brun, City of Chicago Department of Aging
- Laurie Dittman and Doreen Bogus, Mayor’s Office of Disabilities
- Ann Hogan, Cook County Workforce Investment Board (South and Western Suburban)

On-Going Coordination Activities

There is an ad-hoc committee on transit coordination that has met with Rep. Julie Hamos of Evanston to introduce new coordination legislation to address transportation quality and maximize funding opportunities. Moreover, Pace is attempting to organize coordination meetings and activities with advisory boards. A noted resource for coordination planning was the Interagency Coordinating Transportation Committee report to the Governor and General Assembly.

Existing Services

Some of the key points noted about existing transit service in Cook County included:

- **Availability of major services:** Many respondents reported their clientele rely on the major transit services such as CTA, Pace, and Metra, as well as specialized services.

- **Gaps in service quality:** Despite a high overall impression of transit service in Cook County, multiple respondents indicated that there were problems with geographic coverage, service hour coverage (particularly for 2nd and 3rd shift workers and reverse commuters) service speed, and on-time performance/timeliness of both fixed-route and curb-to-curb services.

- **Private services:** An employment assistance agency indicated that some larger employers in the region will offer shuttle services for disadvantaged employees to get to work, including temp agencies, UPS, and Suburban Job Link.
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- **Senior Shopping Shuttles**: These shuttles are administered by the Mayor’s office, serving 104 senior residences throughout the City of Chicago.
- **Cost**: The cost of fuel and day-to-day operations is a major barrier to enhancing transportation service and maximizing effectiveness.

**Needs/Duplications**
- **Few duplications**: Respondents, particularly social service agencies indicated that there were few areas of service overlap – in fact, there were significant areas with a lack of coverage.
- **Excess capacity**: One respondent reported that community and church vans are sometimes underutilized.
- **Taxi service**: Taxis can be a good alternative to specialized transit services but are frequently unavailable when needed; some problems with driver training were cited.
- **Funding sources**: Although current streams of funding for specialized transit were good, more new and dedicated sources are needed to close the gaps in service.
- **Service area restrictions**: In some cases, geopolitical boundaries (e.g. township lines) act as a barrier to provision of effective transit services.
- **Barriers to coordination**: Barriers to coordination included service quality concerns, large scale agencies addressing the needs of elderly and disabled persons, and differing cost and funding structures.

**Goals/Ideas**
- **Regular meetings**: Several respondents indicated that regular meetings between human service agencies, major transit providers, and citizens, would be a good way to increase dialogue and understand each others’ issues and concerns. This should include public outreach and meetings in outlying communities.
- **Service coverage**: Increasing the service coverage areas of both fixed-route transit and demand responsive service would allow people on the fringe to access jobs, shopping and medical appointments, particularly at off-peak times. Employment assistance agencies stated that service to outlying areas and providing owl service would be desirable especially for low income people.

**DuPage County**

**Interviewees**
- Carol Simler, Executive Director, DuPage PADS (non-profit, homeless interests)
- Jody Hefler, Senior Services Coordinator, Village of Glen Ellyn
- Cathy Ficker-Terrill, Ray Graham Association (non-profit, developmental disabilities – children and adults)
- Carmen Caruthers, Manager, Transportation and Planning Operations, City of Naperville
- Angela Bentsen, Director of Senior Services, Naperville Township
On-Going Coordination Activities

DuPage County has an active and well established Inter-Agency Planning Coordination Council (IAPCC) that has been responsible for many of the successful coordination projects in DuPage County, including Ride DuPage and the Pilot II subsidized taxi program. Both the IAPCC and its programs are models for other counties, regionally and nationally. The IAPCC benefits from having many of the same members participate over time. It includes several sub-committees, including an outreach committee that aims to connect to additional human service transportation providers.

Existing Services

Communities in DuPage County including the County government, offer residents some of the highest level of community transportation services in the seven-county study area, especially those communities that participate in the Ride DuPage program. Ride DuPage is the County’s coordinated human services – public transit service. The Ride DuPage program, as sponsored by Naperville and Lisle provides 24-hour, 7 day per week service to their resident older adults and persons with disabilities, without any service area limitation. The fare for this service is based on distance traveled.

Most townships and some municipalities in DuPage County also have their own dial-a-ride program and/or subsidized taxi programs. Several of the individuals interviewed reported problems with the Pilot II taxi subsidy program, primarily associated with taxi drivers refusing to take the vouchers. In many cases human service programs also have vehicles or provide transportation services; and in some of these cases human service transportation will overlap with municipal or township dial-a-ride programs.

Needs/Duplications

- **Sustainable/Reliable funding:** Several respondents, especially Ride DuPage program sponsors, noted the need for consistent, reliable funding sources so that the existing level of service can be maintained.
- **Information:** DuPage County has a developed county inventory of available community transportation resources. This is a well-established resource, but could be improved with more and more diverse formats, e.g., language, such as foreign language and electronic formats.
- **Vehicles:** Some of the human service organizations feel establishing more transparent methods for obtaining new vehicles is essential.
- **Service gaps:** Among those groups who experienced a service gap were low-income young persons (due to ineligibility for Medicaid taxi service), and the elderly and the disabled, who desired more effective and expanded transit services.
Goals/Ideas

- The major goal among stakeholders in DuPage County is finding sustainable funding for existing transportation programs. As demand increases, sponsors are increasingly challenged by funding.

- Major goals revolved around two themes: obtaining new vehicles for fleet updates while minimizing cost, and improving the general public transit situation (including fixed-route services and those provided by Pace)

Kane County

Interviewees

- Danise Habun, Hanover Township / TIDE Initiative
- Lynn O’Shea, Kane County AID
- Jerry Murphy, Mental Health & Mental Retardation Service
- Lynn Bosley, United Way of Elgin
- Thomas Mihenlic, River Valley Workforce Investment Board
- Joyce Helander, Day One Network
- Holly Smith, Kane County
- Reesha Oliver, Transportation Supervisor, Hanover Township
- Neil McMenamin, PADS Program
- Gene Dempsey, Coalition of Citizens with Disabilities

On-Going Coordination Activities

The Kane County Paratransit Coordinating Council (KCPCC) was formed in October 2003, and produced a resource guide for seniors and people with disabilities in 2004.

Most notably, the KCPCC recently prepared a successful JARC/NF funding application (with Pace) to fund the Ride-in-Kane program, a coordinated transportation service that will build on the success of Ride DuPage, using similar organization and structure including a centralized dispatch service to eligible Kane County residents. This program will begin in late summer 2007. The council continues to meet, involving 30 stakeholders.

Existing Services

- While several townships have local dial-a-ride services, several townships, especially those located in the southwest portion of the County do not have any paratransit or community transportation services.

- A combination of rural and urban areas means large buses are unsuitable, and population density too low for fixed routes in suburban areas.

- There is a lack of transit to areas where job opportunities are growing rapidly and, in those areas with transit, services end too early for those with late shifts.
Needs/Duplications

- Securing long-term funding for the new Ride-in-Kane program is a principal challenge. More broadly, maintaining momentum for coordination over a number of years is critical.
- Defining service areas according to County and municipal borders is not always consistent with the travel needs of County residents and there is an inequity in the availability of services between municipalities.
- Paratransit operating hours are frequently too short and do not adequately reflect passenger needs.
- There are currently gaps in public awareness of available transit and paratransit services; need for education about public transportation, more accessible information and better marketing. Brochures are being created for Ride-in-Kane.
- Fixed-route service is often inappropriate given harsh weather conditions and uncovered bus stops, especially for persons with disabilities.

Goals/Ideas

- Multiple transfer hubs outside traditional downtown to aid accessibility to peripheral locations.
- Agencies that assist the same population could establish van service between relevant locations.

Kendall County

Interviewees

- Jeff Wilkins, Kendall County
- Alan Zaeske, Fox Valley Older Adults
- Dr. Amal Tokars, Kieth Belemas, and RaeAnn Van Gundy, Kendall Health Department

On-Going Coordination Activities

Interviewees in Kendall County are planning to develop a transit system in Kendall County; there are currently very limited community transportation services in the County. Kendall County is optimistic about coordination; they are learning from Kane and DuPage counties. The current planned transit system was designed through a working group that consisted of representatives from several agencies and stakeholders.

Existing Services

A couple of human services organizations based outside of Kendall County serve Kendall County residents. One of these, Fox Valley Older Adults based in DeKalb County also provides a minimal level of services in Kendall County as far east as Plano. Taxi service is very limited in the county.
Needs/Duplications
Lack of sufficient transportation encourages agencies such as the Health Department to provide outreach services rather than serve clients on site, limiting their scope of service. It would be good to integrate those services that are expanding – specifically Workforce Investment Board and Senior Services – into the emerging coordinated transportation system.

Goals/Ideas
Ideal transportation system would be inclusive not exclusive, and address the systematic segregation which is seen to undermine cost effectiveness and create issues of social justice. The proposed transit system includes a combination of fixed-route and dial-a-ride services designed to efficiently serve the more urban and rural parts of the county.

Lake County

Interviewees
- Dorothy Russell, Catholic Charities of Lake County
- Carolyn Guthman, Lake County Council for Seniors/AARP
- Kay Starostovic, President, Lake County Coordinated Transportation Committee, Grant Township Supervisor, Grant Township Senior Committee
- Krista Erickson, Lake County Center for Independent Living
- Tom Chefalo, Lake County Planning Department
- Vicky Gordon, Lake County Workforce Investment Board
- Ted Byers, United Way of Lake County

On-Going Coordination Activities
There is a county-wide, multi-organization coordinating group, the Lake County Coordinated Transportation Services Committee, that was created and formalized in May, 2006. The Lake County Coordinated Transportation Services Committee is currently working with several other county level advocacy groups, including the Lake County Council for Seniors and Getting to Work in Lake County so that they will be more unified and better organized. Other coordination efforts include the Lake County Workforce Investment Board and Work, Welfare and Families (WWF) efforts to develop a coordinated transit plan called, “Getting to Work in Lake County”.

Existing Services
In addition to Pace fixed routes, CTA, and Metra, human services agencies provide some community transportation services, but reported that they face certain challenges in serving their clients. The road structure in Lake County makes it difficult to make convenient connections for some trips, and providers reported inadequate funds to properly operate full-time service. In addition, most of the transit service coverage is limited to set corridors clustered around the eastern part of the County and as such miss the people living in the outlying areas. Stakeholders found that Pace is unable to fill in the gap; there are areas of the county (particularly the west and north)
with inadequate service, especially on weekends. One respondent indicated problems with
disabled accessibility at transit stops and the paths to get there.

Needs/Duplications

- **Boundaries**: Many respondents noted that many of the existing dial-a-ride services do not
  provide service across town boundaries
- **Lack of service**: Respondents complained of a lack of service in the area; duplication was
  not considered a problem. Some noted the difficulty in providing fixed-route transit in
  Lake’s rural environment. In one case, three townships chipped in to purchase a Pace bus
  to run service to their communities
- **Operating funds**: Respondents indicated that funds were inadequate to properly maintain
  services
- **Trip purposes**: There is a need to provide rides to seniors for varying trip purposes,
  including medical appointments and pharmacy trips
- **Information**: Respondents indicated that community information and marketing about
  transit was poor

Several respondents indicated barriers to coordination and other associated problems included:

- Differing fare structures between the major transportation providers (Pace, Metra, CTA)
  made coordination difficult when multiple providers were needed
- Transportation to specialized medical appointments poses a problem for coordination
  when certain vendors refuse service at those times, particularly on weekends – scheduling
  particularities are a barrier
- While some partners networked or collaborated with one another, there was a stated need
  for coordination among transportation users and providers

Goals/Ideas

The Lake County Coordinated Transportation Committee suggested:

- **Collaboration among umbrella groups**: Including Lake County Partners, Lake County
  Transportation Alliance
- **Referendum**: Another idea might be to consider a county referendum for senior services

McHenry County

Interviewees

- John Labaj, Deputy County Administrator, McHenry County
- Jason Osborn, McHenry County Department of Transportation
- Donna Schaefer, McHenry County Supervisor
- Celia Reed, Pioneer Center for Human Services
- Dean Karamangianis, Pioneer Center for Human Services
On-Going Coordination Activities

The McHenry County Transit Plan Implementation Task Force is a leader in the effort to develop more and better transit resources in McHenry County. The Task Force is currently seeking funding for transit plan elements and aims to improve coordination between various human service organizations. McHenry County and the McHenry County Department of Transportation are united with the Task Force in this effort. In general, interest in County and regional coordination has been strong, although one stakeholder stated that identification of needs and overlaps is beyond the reach of individual organizations, indicating that a broader umbrella program of coordination assessment would be more effective.

The Task Force will look to JARC and New Freedom funding programs to obtain funds for a centralized call center, including renovations and the installation of automated scheduling and dispatch software. Calls for service would be channeled through the center and brokered to various providers, including accessible van, bus, or taxi. Cost sharing arrangements will need to be developed to facilitate this practice, a process that will require extensive coordination between agencies.

Existing Services

The presence of Pace in the county is fairly low and, due to its rural nature, it is anticipated that more intensive fixed-route transit would be difficult to introduce. Therefore, present efforts are aimed at filling in gaps via coordination of human services organizations rather than at expansion of scheduled bus routes.

Needs/Duplications

Stated needs and duplications included:

- **Coordination**: The installation of the proposed call center will require intensified efforts at coordination to unite the various organizations involved and to develop a cost-sharing structure
- **Capacity**: There is a need to improve transit capacity, especially among the elderly and disabled, particularly at mid-day
- **Service quality**: Respondents from Pioneer Center, a care agency for persons with mental illnesses, indicated that Pace services were sometimes excessively slow for their clients, or that contractors were sometimes insufficiently trained to deal with the mentally disabled

Goals/Ideas

The McHenry County Transit Plan Implementation Task Force feels that smaller rather than larger efforts toward improvement of transit would be the most effective way to achieve results. The proposed call center is at the forefront of this endeavor.
Will County

Interviewees

- Ken Noth, Executive Director, Eastern Will County Senior Service
- Shari Nagel, Trinity Services
- Loren Cherne, The Council
- Susan LaTour, Will County Legal
- Barbara Collins, Catholic Charities Daybreak
- Cindy Ketcham, Veterans Assistance Commission
- Matthew Lanoue, Cornerstone Services
- Maureen Pool, Will County Center for Community Concerns
- J.D. Ross, Will-Grundy Medical Clinic
- Barbara Birchler, Habitat for Humanity
- Kelly McKenzie, Will-Grundy Center for Independent Living
- Kris Toll, Morning Star Missions
- Charlene Lockowitz, Crisis Line
- Marge Zajicek, Senior Services Center
- Mike Hennessy, United Way of Will County

On-Going Coordination Activities

There are many examples of coordinated activities in Will County. Trinity Services, a major provider of transit services for the disabled, has previously engaged in a coordination effort with the RTA, including a time-of-day ridership analysis. Riders benefited several years ago when Pace allowed automatic eligibility certification for Trinity clients rather than requiring a separate – and cumbersome – process that no longer exists. Trinity also coordinates rides with Easter Seals and United Cerebral Palsy. Coordination mainly exists within the county with minimal activity outside the County borders in Cook County.

Other examples of collaboration exist. One respondent mentioned the CATS Task Force (for seniors and people with disabilities) and the Community Mobility Task Force (Chicago Metropolitan area). Many agencies met to provide input on the Eastern Will County Rail study. Several interviewees indicated a wide range of agencies with similar services network on a fairly regular basis. The degree and level of transportation coordination varied – in some cases, services were arranged contractually between a provider and a funder (such as the Chicago Department of Aging contract with Pace). The Community Services Council is a group of 70 local service agencies who participate on a voluntary basis and meet periodically to discuss issues of common concern.

Some stakeholders were aware that coordination efforts had been undertaken in the past, but were unsure of specifics. Some felt that these efforts were not transparent – few could remember what had become of them. Social service agency staff felt strongly that continued progress on this study was important because coordination has enormous potential. A final body of note, the Will
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County Governmental League, is a transportation committee that meets monthly and may be a good forum for addressing transportation coordination.

Existing Services

- **Pace**: Pace is a major local transit service, but its service cutoff at 5:00 p.m. poses a challenge to local mobility especially for working people.
  - The fact that the Dial-a-ride service will not cross township boundaries hinders ridership, a problem noted by multiple stakeholders.
  - Curb-to-curb service is not adequate for all riders; some require door-to-door assistance.
- **Taxi Access Program**: The Taxi Access Program is a voucher service that has experienced very high demand in recent years.

Needs/Duplications

- **Duplication**: Several respondents noted that there were other, sometimes smaller organizations providing very similar service.
- **Funding**: Organizations cited lack of funding as a barrier to extending and enhancing services.
- **Information**: Several agencies suggested that getting information about transit out to the public was a problem, particularly for persons in need who were unaffiliated with an agency. More travel training would help people transition from demand response service to fixed-route service.
- **Service shortcomings**: Many agencies in Will County indicated that, for a variety of reasons, the present services were difficult for their clients to use. Reasons included:
  - Pace services do not cover 2nd and 3rd shift workers, especially in the industrial corridor (late night/owl service was a suggested remedy)
  - Flexibility of service: fixed routes can be circuitous and require long ride times, including the need to make multiple transfers and some routes not directly serving job locations
  - Bus transfer facility is inconveniently located downtown
  - Lack of subscription service or advance scheduling for Pace paratransit

Goals/Ideas

- **Coordination lead agency**: Trinity Services would be interested in serving as a lead in enhancing coordination in the County and to better network with the various providers. They suggested that RTA would make a good partner agency.
- **Information**: There was a strong feeling that there was a lack of public information and that improving upon informational materials and distribution methods (including public meetings) would be very useful. An information clearinghouse was suggested to provide one source for all transit information in one publication or by one service.
Regional Services

Interviewees

- Russell Pietrowiak, Chicago Metropolitan Agency for Planning (CMAP)
- Elsa Gutierrez, Chicago Transit Authority
- Lester Foster, First Transit
- Juan Salgado, Institute for Latino Progress
- Virginia Chandler, Metra
- Walt Meyers, Northeastern Illinois Area Agency on Aging (AAA)
- David Snell, Tom Groeninger, and Lorraine Snorden, Pace
- Joe DiJohn, University of Illinois – Chicago/Urban Transportation Center
- Elio Montenegro, United Way of Metro Chicago
- Edward Ruebensam, Jesse Brown VA Medical Center
- Pam Heavens, Center for Independent Living
- Larry Dawson, Illinois Department of Commerce and Economic Opportunity (DCEO)

On-going Coordination Activities

Pace

- Merging ADA paratransit services and Dial-a-ride services into sub-regional contracts
- Shifting Chicago Department of Aging trips to Special Services from ADA Paratransit, where they can be provided at lower cost
- Merging human service agency trips into sub-regional contracts and creating opportunities for “co-mingling” e.g. Ride DuPage and Ride-in-Kane
- Collaboration with county paratransit coordinating councils resulted in several sponsors sharing in the local match for projects recently-awarded JARC funding

Metra

In partnership with Lake-Cook Transportation Management Association (TMA) Shuttle Bug service has grown to ten routes, operated by Pace and coordinated with rail schedules. The firms served by the buses contribute about 35% of the operating costs.

Illinois Department of Human Services

The Interagency Coordinating Committee on Transportation (ICCT) developed a database of transportation providers and produced a report exploring potential approaches to coordination.

Illinois Department of Healthcare and Family Service

Procured a statewide broker – First Transit – to handle non-emergency Medicaid trips
Sub-regional Councils

There are six sub-regional councils in suburban Cook County and five in the six collar counties. Meet regularly for cooperative decision-making and obtaining sub-regional consensus before being brought to the regional Council of Mayors Executive Committee for debate.

Existing Public Transit Services

Pace

In addition to providing fixed-route suburban bus service, Pace provides five forms of paratransit.

- ADA paratransit mirrors Pace fixed-route services: 458,774 trips contracted in eight service areas to three total vendors using Pace vehicles
- Non-ADA paratransit services such as municipal-sponsored dial-a-ride and agency-sponsored services: 62 programs providing 1,929,426 trips on Pace vehicles and taxis. Costs are only partially borne by Pace
- The Advantage Vanpool Program

Metra

70% of Metra’s 237 stations are accessible. For those which aren’t accessible, free shuttle service is provided for individuals from within ¾-mile of the non-accessible station to the next accessible station, provided there is no other accessible public transport within ¾-mile of the non-accessible station.

CTA

All 154 bus routes are fully accessible. Pace has responsibility for providing the following:

- ADA paratransit on behalf of the CTA in the CTA service area (formerly Special Services). Contracts with three private carriers provided 1,673,628 trips in FY 2005.
- Taxi Access Program providing $13.50 taxi vouchers to ADA-eligible individuals for $5 purchase price, comprising 631,286 trips. Mobility Direct is a component of this which provides such service for subscription (regular weekly) trips.

Numerous human service agencies and institutions directly provide customized transportation to their clients. First Transit estimates there are 500 providers of transportation in the RTA service area, for example:

- Jesse Brown VA Medical Center operates shuttle buses to community-based outpatient clinics
- Numerous temporary employment agencies provide their own transportation for workers; and Northeast Illinois Area Agency on Aging provided 29,000 units of transportation across the collar counties, through taxi vouchers, volunteer driver programs and partner organizations
Needs/Duplications

- A recent analysis of the Taxi Access Program found that the convenience of the program was not fostering the expected savings in transferring trips from ADA paratransit to this less costly alternative.
- CTA Paratransit (formerly Special Services) is listed in the rider guide as curb-to-curb but functions as door-to-door.
- All Pace’s services are operating at or near capacity: 63 trips were denied in 2005, contrary to policy, due to capacity constraints.
- Pace fixed-route service hours insufficient, and paratransit only required to mirror these services.
- CMAP believed that the RTA’s selection process for JARC and New Freedom funding in 2006 was very subjective with little input from local entities.
- All groups sought reforms to the selection process of JARC and New Freedom projects.

Goals/Idea

CMAP staff offered the following comments:

- Project sustainability should be included in the selection criteria.
- A combination of old and new projects should be recommended for funding annually.
- Project evaluation should be quantitative to ensure greater objectivity, and evaluating success should be a monthly, public process, sensitive to a lack of operating statistics for new projects.
- Priority should be given to projects with a solid local match.
- Coordination should be viewed as a means to increase mobility, not decrease costs.

Metra staff said that a portion of program funds should be set aside to sustain previously funded projects, and the criteria should be:

- Priority for joint projects.
- Total volume of jobs being reached—not just low income.
- Cost per trip/subsidy per trip.
- Sustainability of project.

Pace staff offered the following comments:

- Priority should be given to projects which are innovative or expand existing services.
- Credit should be awarded for joint partnerships which demonstrate coordination.
- Oral interviews should be part of the application process.
- Rejected applications should receive feedback and guidance.
CTA staff suggested that criteria for selection should consider:

- Cost per rider to provide service
- Subsidy per rider
- Impact on minority population
- Ease of project implementation
A.4 Open House Workshops

A total of eight public workshops were held in April 2007 and over 150 people attended. Workshops were held in Kane, McHenry, Lake, DuPage, and Will counties. There were also three workshops held in Cook County, one in the north Cook area, one in south Cook, and one in the City of Chicago. The purpose of the workshops was to present preliminary findings to key stakeholders and members of the general public and to gather additional input. An overview of key input and revisions can be found in the table on the next page.

McHenry Workshop, April 19th, 2007

Lake County Workshop, April 18th, 2007
<table>
<thead>
<tr>
<th>County</th>
<th>Input and Revisions</th>
</tr>
</thead>
</table>
| Cook       | • More curb-to-curb service needed  
| City of Chicago | • Need centralized dispatch coordination  
|             | • Simple extension of ADA coverage from ¾ to 1.5 miles would remedy service gaps  
| Cook       | • Participation too low for meaningful input  
| North suburbs |                                                                                              |
| Cook       | • Better coordination in municipalities that overlap multiple townships.  
| South suburbs | • Need centralized database of eligible services  
| DuPage     | • There is a serious lack of transportation services for medical appointments and prescriptions.  
|             | • Suggestion to add a volunteer driver and a family mileage reimbursement program to Ride DuPage.  
| Kane and Kendall | • Central communication hub to coordinate the needs of riders with available transportation vehicles  
| Joint workshop | • There need to be new ideas for targeting new funding sources and services for low-income residents  
| Lake       | • Service coverage insufficient to cover temporary work assignments and non-regular shifts.  
|             | • Need centralized database of eligible services and comprehensive trip planner  
| McHenry    | • Limited access to educational institutions and opportunities  
|             | • Most services inconvenient for non-regular shift workers  
|             | • There needs to be a higher level of driver assistance and flexible routes.  
|             | • Need centralized database of services beyond web access  
| Will       | • There should be plans to connect low-income housing with industrial and service industry jobs.  
|             | • Volunteer driver programs should be explored  

A.5 Focus Groups

In order to garner additional information about the specific transportation services and needs for the three constituent user groups (elderly, persons with disabilities and persons with low-incomes), six focus group meetings were held in early June 2007. An overview of key findings is provided in the table on the next page.

Countryside Association Focus Group
<table>
<thead>
<tr>
<th>Organization</th>
<th>Constituency</th>
<th>Principal Findings</th>
</tr>
</thead>
</table>
| Countryside Association for People with Disabilities   | Persons with Disabilities Collar counties   | • Individuals use Pace paratransit, Countryside Association vans and rides from family in order to access this institution and employment sites from their homes.  
• Lack of bus services and inability of local transit services to cross jurisdictional boundaries are principal concerns.  
• Would favor telephone services specifically for people with special needs, enhanced subsidized taxi service and volunteer driver programs, and volunteers or ambassadors to assist use of fixed-route transit. |
| Access Living                                          | Persons with Disabilities Chicago           | • Negative experience and perception of Pace paratransit due to reliability issues and excessive journey times, creates reluctance to commit to employment or volunteer positions.  
• Inadequate dissemination of service information through internet and vehicle posters: group would prefer personalized messages to home via phone or mail.  
• Would favor expansion of taxi voucher programs to enhance independence and allow trips for recreational/social purposes. |
| Community and Economic Development Association (CEDA)  | Spanish language speakers Regionwide         | • Limited access to automobiles, all use CTA bus and rail frequently while looking for work or commuting to part-time jobs, subject to unreliability and inconvenient transfers.  
• Would like more extensive Spanish translation, Hispanic staff at CTA and cultural education for CTA staff.  
• Would favor reverse commute express buses between Chicago and inner suburbs, as well as information on carpool/vanpool options. |
| Community and Economic Development Association (CEDA)  | Persons involved in workforce development Regionwide | • Principal challenge is low-income persons traveling between suburban communities.  
• Many are frequently unable to take jobs due to lack of sufficient transportation service: multiple transfers, short service hours and uncoordinated bus and rail schedules.  
• Would favor expanding vanpool and guaranteed ride home programs. |
| Schaumburg Township Senior Services                    | Older Persons West and NW Cook County       | • Feel that mobility needs are not met due to limits on service area and hours of operation.  
• Uses taxis but faces poor service due to short trip lengths requested.  
• Would favor centralized information and enhanced community bus service. |
| Eastern Will County Senior Services                    | Older Persons NE Will County                | • Highly informed on how to use service to access medical services, generally satisfied.  
• Centralized telephone service with operators rather than automated answering desired.  
• Would favor using resources to increase scope of transportation service, especially in the evenings and on weekends. |
A.6 Public Announcements

Opportunities for public involvement were encouraged through the dissemination of information on the planning process through various channels. Frequent updates on the planning process were posted to a RTA hosted website, including preliminary findings and information on how to participate directly in future stages. See Figures below for screenshots from this website.

Comment form on Connecting Communities through Coordination Website
This website also featured an interactive tool to solicit feedback from the public online. Submissions to the website yielded the following input to the planning process:

- Transit fares excessive for those on low incomes, who tend to use cash payments which are the highest possible.
- Bus routes need to consider serving regional malls to provide access to important retail options.
- Bus service for the disabled is not extensive enough in suburbs to make it useful.
- Paratransit services which do not cross county lines create inconvenient gaps in service for commuting trips. Intra-county alternative destinations may be further than alternative destinations in adjacent counties.
- Duplication of service exists in many areas in the region.
A.7 Press Releases and Media Coverage

The RTA produced and circulated two press releases during the planning process. The first, in February 2007, announced the launch of the website and the beginning of the Connecting Communities through Coordination planning effort. The second pertained to the eight open house workshops held in April 2007. Both are included below.

The Daily Herald, Chicago’s largest suburban newspaper, featured a profile of the planning effort in late February and an article in early April pertaining to the Lake County public workshop. The Naperville Sun also announced the DuPage workshop. The Connecting Communities through Coordination planning effort was also profiled in RTA’s InTransit magazine in March 2007.

The workshops were also announced via “community calendars” in each of the respective locations. Participation was also encouraged by publicity via the organizations affiliated to members of the PAC. For example, the Center for Neighborhood Technology (CNT) circulated information through its Transit Future initiative; Jacky Grimshaw at the CNT is a PAC member.
RTA Launches Effort to Maximize Coordination of Human Services Transportation for Disabled, Elderly and Low-Income Individuals

Connecting Communities Through Coordination planning effort to span seven counties

Chicago – The Regional Transportation Authority’s (RTA) today announced that it has launched a comprehensive, seven-county planning initiative geared toward strengthening the coordination of existing public transit and human services transportation.

The planning effort, known as Connecting Communities Through Coordination, aims for better coordination of existing transportation services by inventorying existing service, assessing mobility needs, identifying potential gaps in service and recommending strategies to ensure that transportation services are delivered effectively and efficiently to the area’s disabled, elderly and low income residents. Better coordination of these transportation services will enable the RTA and regional stakeholders to maximize the use of every resource and every dollar. The planning effort is expected to last several months and will cover Cook, DuPage, Kane, Kendall, Lake, McHenry and Will counties.

“When we encourage more efficient use of available services that bring enhanced mobility to our residents, the RTA and the entire region is able to stretch already scarce resources to the greatest extent possible,” said Stephen Schlickman, RTA’s Executive Director. “By demonstrating that there is a true regional plan to move forward, the RTA and its service providers are better positioned to make the best use of available federal dollars in future years.”

Connecting Communities Through Coordination will include a comprehensive public participation effort to obtain input, feedback and direction from representatives of public, private and nonprofit transportation and human service providers. In the coming weeks, RTA will announce several county-based public workshops to share information with and gather ideas from members of the general public, particularly people with disabilities, older adults and individuals with lower incomes, to ensure their voices are heard.

“It is our goal to make Connecting Communities Through Coordination a plan that is developed by and for the people and organizations we serve,” said Schlickman. In addition to public workshops, the RTA will be meeting with key regional stakeholders, interviewing advocacy groups and surveying transportation providers to seek recommendations on how to better coordinate services across municipal and county lines. “To fulfill our goal of making this a truly regional plan, we are counting on robust participation from everyone who has a stake in well-coordinated and efficient transportation service,” Schlickman said. The coordination planning effort was prompted by provisions in the federal Safe, Accountable, Flexible, Efficient Transportation Act, a Legacy for Users (SAFETEA-LU), which provides funding for Federal surface transportation programs through FY 2009. SAFETEA-LU requires the establishment of a locally developed, coordinated public transit human services transportation plan in order for the northeastern Illinois region to access specific federal funding programs.

The project team includes members of the RTA, regional stakeholders, and a nationally-renowned transportation consulting team led by Nelson\Nygaard and Associates. The Connecting Communities Through Coordination web site can be found at hstp.rtachicago.com.
RTA ANNOUNCES OPEN HOUSES TO HELP IMPROVE COORDINATION OF PUBLIC TRANSIT SERVICES

Connecting Communities Through Coordination planning effort covers seven-county region in northeastern Illinois

Chicago – The Regional Transportation Authority (RTA) has announced a planning effort called Connecting Communities Through Coordination designed to improve coordination of existing transportation services in northeastern Illinois. In launching the project, stakeholder information already has been sought to determine the current status of service coordination, identify the inventory of available community services and assess the transportation needs of persons with disabilities, older adults, and persons with limited incomes. Now, the RTA needs the public’s help for verifying the findings to date and encouraging ideas to improve service coordination and efficiency in the region while avoiding service redundancies. Better coordination of these transportation services will enable the RTA and regional stakeholders to maximize the use of every resource and every dollar, especially as the agency’s Moving Beyond Congestion strategic plan is underway.

“We are conducting these public open houses in order to identify coordination strategies for our entire service area and to ensure that everyone has a chance to participate in creating our regional plan,” said Steve Schlickman, RTA Executive Director. “We realize that by gathering community input and striving for well coordinated and efficient transportation services that we will be able to make the most of existing limited resources and position our region to benefit from future federal funding.” The Connecting Communities Through Coordination project serves the counties of Cook, DuPage, Kane, Kendall, Lake, McHenry and Will.

During the open houses, the RTA will seek input from and participation by the general public – particularly from persons with disabilities, older adults and persons with lower incomes to ensure their voices are heard. The RTA will distribute informational materials and have personnel on hand to listen to comments and answer questions. Staff from Nelson/Nygaard, a nationally-renowned transportation consulting team, will facilitate the open houses.

The coordination planning effort was prompted by provisions in the federal Safe, Accountable, Flexible, Efficient Transportation Act: a Legacy for Users (SAFETEA-LU) that provides funding for Federal surface transportation programs through FY 2009. SAFETEA-LU requires the establishment of a locally-developed and coordinated public transit human services transportation plan in order for the northeastern Illinois region to access specific federal funding programs.

The Connecting Communities Through Coordination web site is hstp.rtachicago.com and includes results of the planning effort to date along with a section for suggestions and feedback.

PUBLIC OPEN HOUSE LOCATION AND DETAILS

City of Chicago
Monday April 16, 2007 from 6:00 p.m. – 7:00 p.m.
United Way of Metropolitan Chicago, 1st Floor Conference Room
560 W. Lake St., Chicago, IL

Northern Cook County
Monday April 16, 2007 from 6:00 p.m. – 7:00 p.m.
Oakton Community College, Room 1604
1600 E. Golf Rd., Des Plaines, IL
Southern Cook County
Tuesday April 17, 2007 from 6:00 p.m. – 7:00 p.m.
Tinley Park Village Hall, Rooms C & D
16250 S. Oak Park Rd., Tinley Park, IL

Lake County
Wednesday April 18, 2007 from 5:30 p.m. – 7:00 p.m.
Libertyville Township Center, Meeting Room
359 Merrill Court, Libertyville, IL

Will County
Wednesday April 18, 2007 from 6:00 – 7:00 p.m.
Joliet Historical Museum, Caterpillar, Inc. Auditorium
204 N. Ottawa St., Joliet, IL

Kane/Kendall County
Thursday April 19, 2007 from 5:00 p.m. – 7:00 p.m.
Kane County Government Center, 1st Floor Auditorium
719 S. Batavia Ave. Building A, Geneva, IL

McHenry County
Thursday April 19, 2007 from 5:00 p.m. – 7:00 p.m.
McHenry County College, Rooms B166 & B167
8900 US HWY 14, Crystal Lake, IL

DuPage County
Thursday April 26, 2007 from 10:30 a.m. – 12:00 p.m.
Wheaton Park District Community Center, Lower Level
1777 S. Blanchard Rd., Wheaton, IL

If attendees require auxiliary aids or services, such as an American Sign Language Interpreter or written materials in accessible formats, please contact Jay Ciavarella at 312-913-3252 (voice), 312-913-3122 (TTY) or ciavarellaj@rtachicago.org at least 48 hours in advance of the workshop.
A.8 Participation by County

Connecting Communities through Coordination included a wide variety of public outreach efforts; as a result numerous individuals and organizations participated in study projects and provided information, comment or feedback on study products. Contact information for participants from various aspects of the public involvement effort was managed through a central database, which aided efforts to identify and reach out to three target populations. This database will be used to facilitate ongoing communication and participation in the study, including review of study findings and recommendations as well as implementation.

Participation in the study included attending project advisory committee meetings, stakeholder interviews, workshops, and focus groups. An overview of participation in the study is provided in the following table; this table lists the number of individuals and/or organizations by county who participated in any of the study activities.

<table>
<thead>
<tr>
<th>County</th>
<th>Multiple Populations</th>
<th>Disabled</th>
<th>Older Adults</th>
<th>Low Income</th>
<th>Total</th>
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<td>20</td>
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</table>
## Appendix B  Summary of Existing Services

### Shown by County and by Type of Service

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<thead>
<tr>
<th>Cook County</th>
<th>Type</th>
<th>General Public</th>
<th>Disabled Persons</th>
<th>Older Adults</th>
<th>Low Income Persons</th>
<th>Other Qualities</th>
<th>Extended Service Hrs</th>
<th>Annual Ridership (1)</th>
<th>Fleet Size</th>
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<td></td>
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</table>

1All ridership counts are 2005 figures except those marked with an asterisk (*), which are 2006 figures.

### Types of Service
- D = Dial-a-Ride
- A = ADA Paratransit
- R = Ride DuPage
- H = Human Service Agency Client Transportation Programs
- T = Taxi/Transit Subsidy Programs

### Abbreviations
- N/A = Not Applicable
- Extended Service hours:
  - WD = Weekday evening hours until 8PM or later
  - Sa = Saturday hours
  - Su = Sunday hours
## Cook County

<table>
<thead>
<tr>
<th>Type</th>
<th>General Public</th>
<th>Disabled Persons</th>
<th>Older Persons</th>
<th>Low Income Persons</th>
<th>Other Qualities</th>
<th>Extended Service Hrs</th>
<th>Annual Ridership (1)</th>
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1 All ridership counts are 2005 figures except those marked with an asterisk (*), which are 2006 figures.

** While available to ADA paratransit customers in the City of Chicago, TAP is not considered to be an ADA paratransit service as it is an exclusive-ride, same day service.

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### DuPage County

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# Coordinated Public Transit-Human Services Transportation Plan

## Regional Transportation Authority

### Lake County

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<tr>
<th>Service Description</th>
<th>Type</th>
<th>General Public</th>
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<td>Will County ADA Paratransit</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

1 All ridership counts are 2005 figures except those marked with an asterisk (*), which are 2006 figures.

### Types of Service

- **D** = Dial-a-Ride
- **A** = ADA Paratransit
- **R** = Ride DuPage
- **H** = Human Service Agency Client Transportation Programs
- **T** = Taxi/Transit Subsidy Programs

### Abbreviations

- **N/A** = Not Applicable
- **Extended Service hours:**
  - **WD** = Weekday evening hours until 8PM or later
  - **Sa** = Saturday hours
  - **Su** = Sunday hours

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<table>
<thead>
<tr>
<th>Regional/Multi-County Service</th>
<th>Counties Served</th>
<th>Type</th>
<th>General Public</th>
<th>Disabled Persons</th>
<th>Older Adults</th>
<th>Low Income Persons</th>
<th>Other Qualities</th>
<th>Extended Service Hrs</th>
<th>Annual Ridership (1)</th>
<th>Fleet Size</th>
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<td>Advocate Good Shepherd Hospital</td>
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<td>Sa/Su/WD</td>
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<td>Council of Jewish Elderly</td>
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<td></td>
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<td></td>
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<td>Sa/Su</td>
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<td>For Seniors Only</td>
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<td>10</td>
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<tr>
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<td>24/7</td>
<td>7,930</td>
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<td>DeKalb and parts of northwest Kendall and southwest Kane Counties</td>
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<td>X</td>
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<td></td>
<td></td>
<td>Program</td>
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<td>Pioneer Center</td>
<td>All counties in region</td>
<td>H</td>
<td>X</td>
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<td></td>
<td></td>
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<td>Program</td>
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</table>

1 All ridership counts are 2005 figures except those marked with an asterisk (*), which are 2006 figures.

<table>
<thead>
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<th>Abbreviations</th>
</tr>
</thead>
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</tr>
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</tr>
</tbody>
</table>

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Appendix C - Eligible Projects under Section 5316 JARC and 5317 New Freedom Programs

Section 5316 JARC

Eligible projects under JARC may include, but are not limited to:

- late-night and weekend service;
- guaranteed ride home service;
- shuttle service;
- expanding fixed-route mass transit routes;
- demand-responsive van service;
- ridesharing and carpooling activities;
- transit-related aspects of bicycling (such as adding bicycle racks to vehicles to support individuals that bicycle a portion of their commute or providing bicycle storage at transit stations);
- local car loan programs that assist individuals in purchasing and maintaining vehicles for shared rides;
- promotion, through marketing efforts, of the:
  - use of transit by workers with nontraditional work schedules;
  - use of transit voucher programs by appropriate agencies for welfare recipients and other low-income individuals;
  - development of employer-provided transportation such as shuttles, ridesharing, carpooling; or
  - use of transit pass programs and benefits under Section 132 of the Internal Revenue Code of 1986.
- supporting the administration and expenses related to voucher programs;\(^4\)

\(^4\) This activity is intended to supplement existing transportation services by expanding the number of providers available or the number of passengers receiving transportation services. Vouchers can be used as an administrative mechanism for payment to providers of alternative transportation services. The JARC program can provide vouchers to low-income individuals to purchase rides, including (1) mileage reimbursement as part of a volunteer driver program, (2) a taxi trip, or (3) trips provided by a human service agency. Transit passes for use on fixed-route or Americans with Disabilities Act of 1990 (ADA) complementary paratransit service are not eligible. Vouchers are treated as an operational expense which requires a 50/50 (Federal/local) match.
• acquiring Geographic Information System (GIS) tools;
• implementing Intelligent Transportation Systems (ITS), including customer trip information technology;
• integrating automated regional public transit and human service transportation information, scheduling and dispatch functions;
• deploying vehicle position-monitoring systems;
• subsidizing the costs associated with adding reverse commute bus, train, carpool van routes or service from urbanized areas and nonurbanized areas to suburban work places;
• subsidizing the purchase or lease by a non-profit organization or public agency of a van or bus dedicated to shuttling employees from their residences to a suburban workplace;
• supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation. Mobility management activities may include:5
  ♦ the promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals;
  ♦ support for short-term management activities to plan and implement coordinated services;
  ♦ the support of state and local coordination policy bodies and councils;
  ♦ the operation of transportation brokerages to coordinate providers, funding agencies and customers;
  ♦ the provision of coordination services, including employer-oriented Transportation Management Organizations’ and Human Service Organizations’ customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
  ♦ the development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
  ♦ operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems (acquisition of technology is also eligible as a stand alone capital expense).

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5 SAFETEA-LU specified that mobility management expenses are eligible under all FTA grant programs as a capital cost (e.g., 80 percent Federal participation). Mobility management techniques may enhance transportation access for populations beyond those served by one agency or organization within a community. For example, a non-profit agency could receive JARC funding to support the administrative costs of sharing services it provides to its own clientele with other low-income individuals and coordinate usage of vehicles with other non-profits, but not the operating costs of the service. Mobility management is intended to build coordination among existing public transportation providers and other transportation service providers with the result of expanding the availability of service.
otherwise facilitating the provision of public transportation services to suburban employment opportunities.

The labor protection provisions of Section 5333(b) apply to the JARC program.

**Section 5317 New Freedom**

Examples of the types of eligible service include, but are not limited to:

- **New Public Transportation Services Beyond the ADA.**
  - Enhancing paratransit beyond minimum requirements of the ADA. ADA complementary paratransit services can be eligible under New Freedom in several ways as long as the services provided meet the definition of “new.” Eligible projects may include:
    - expansion of paratransit service parameters beyond the ¼-mile required by the ADA;
    - expansion of current hours of operation for ADA paratransit services that are beyond those provided on the fixed-route services;
    - the incremental cost of providing same day service;
    - the incremental cost of making door-to-door service available to all eligible ADA paratransit riders, but not as a reasonable modification for individual riders in an otherwise curb-to-curb system;
    - enhancement of the level of service by providing escorts or assisting riders through the door of their destination;
    - acquisition of vehicles and equipment designed to accommodate mobility aids that exceed the dimensions and weight ratings established for common wheelchairs under the ADA and labor costs of aides to help drivers assist passengers with oversized wheelchairs; and
    - installation of additional securement locations in public buses beyond what is required by the ADA.

- Feeder services. New “feeder” service to commuter rail, commuter bus, intercity rail, and intercity bus stations, for which complementary paratransit service is not required under the ADA.

- Making accessibility improvements to transit and intermodal stations not designated as key stations. Improvements for accessibility at existing transportation facilities that are not designated as key stations established under 49 CFR 37.47, 37.51, or 37.53, and that are not required under 49 CFR 37.43 as part of an alteration or renovation to an existing station, so long as the projects are clearly intended to remove barriers that would otherwise have remained. New Freedom funds are eligible to be used for new accessibility enhancements that remove barriers to individuals with disabilities so they

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6 This concept would permit the acquisition of lifts with a larger capacity, as well as modifications to lifts with a 600 lb design load, and the acquisition of heavier-duty vehicles for paratransit and/or demand-response service.
Coordinated Public Transit-Human Services Transportation Plan

REGIONAL TRANSPORTATION AUTHORITY

may access greater portions of public transportation systems, such as fixed-route bus service, commuter rail, light rail and rapid rail. This may include:

- building an accessible path to a bus stop that is currently inaccessible, including curb cuts, sidewalks, accessible pedestrian signals or other accessible features;
- adding an elevator or ramps, detectable warnings, or other accessibility improvements to a non-key station that are not otherwise required under the ADA;
- improving signage, or wayfinding technology; or
- implementation of other technology improvements that enhance accessibility for people with disabilities including Intelligent Transportation Systems (ITS).

- **Travel training.** New training programs for individual users on awareness, knowledge, and skills of public and alternative transportation options available in their communities. This includes travel instruction and travel training services.

- **New Public Transportation Alternatives Beyond the ADA.** The following activities are examples of projects that are eligible as new public transportation alternatives beyond the ADA:
  - **Purchasing vehicles to support new accessible taxi, ride sharing, and/or vanpooling programs.** New Freedom funds can be used to purchase and operate accessible vehicles for use in taxi, ridesharing and/or vanpool programs. The vehicles must be able to accommodate a passenger who uses a “common wheelchair” as defined under 49 CFR 37.3, at a minimum, while remaining in his/her personal mobility device inside the vehicle, and meeting the same requirements for lifts, ramps and securement systems specified in 49 CFR part 38, subpart B.
  - **Supporting the administration and expenses related to new voucher programs for transportation services offered by human service providers.** This activity is intended to support and supplement existing transportation services by expanding the number of providers available or the number of passengers receiving transportation services. Only new voucher programs or expansion of existing programs are eligible under the New Freedom Program. The New Freedom Program can provide vouchers to individuals with disabilities to purchase rides, including: (a) mileage reimbursement as part of a volunteer driver program; (b) a taxi trip; or (c) trips provided by a human service agency. Transit passes for use on existing fixed-route or ADA complementary paratransit service are not eligible. Vouchers are an operational expense which requires a 50/50 (federal/local) match.
  - **Supporting new volunteer driver and aide programs.** New volunteer driver programs are eligible and include support for costs associated with the administration, management of driver recruitment, safety, background checks, scheduling, coordination with passengers, and other related support functions, mileage reimbursement, and insurance associated with volunteer driver programs. The costs of new enhancements to increase capacity of existing volunteer driver programs are also eligible. FTA notes that any volunteer program supported by New Freedom must meet the requirements of both “new” and “beyond the ADA.”
  - **Supporting new mobility management and coordination programs among public transportation providers and other human service agencies providing transportation.** Mobility management is an eligible capital cost. Mobility management techniques may
enhance transportation access for populations beyond those served by one agency or organization within a community. Mobility management activities may include:

- the promotion, enhancement, and facilitation of access to transportation services, including the integration and coordination of services for individuals with disabilities, older adults, and low-income individuals;
- support for short term management activities to plan and implement coordinated services;
- the support of state and local coordination policy bodies and councils;
- the operation of transportation brokerages to coordinate providers, funding agencies and customers;
- the provision of coordination services, including employer-oriented Transportation Management Organizations’ and Human Service Organizations’ customer-oriented travel navigator systems and neighborhood travel coordination activities such as coordinating individualized travel training and trip planning activities for customers;
- the development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes and to manage eligibility requirements and arrangements for customers among supporting programs; and
- operational planning for the acquisition of intelligent transportation technologies to help plan and operate coordinated systems inclusive of Geographic Information Systems (GIS) mapping, Global Positioning System Technology, coordinated vehicle scheduling, dispatching and monitoring technologies as well as technologies to track costs and billing in a coordinated system and single smart customer payment systems (acquisition of technology is also eligible as a stand alone capital expense).

The labor protection provisions of Section 5333(b) do not apply to New Freedom Programs funds.