



# Would a System of Regional Mobility Managers Benefit Massachusetts?

Final Recommended Action Plan

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**AECOM**



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## Introduction

In Massachusetts, many transit authorities, agencies, and organizations provide transportation for older adults, people with disabilities, rural households, low-income households, and others with mobility needs. However, the current transportation network across Massachusetts is not adequate to serve all who need it. Gaps in service hours and geographic coverage make it challenging for transit-dependent populations to travel between regions – and sometimes within regions. In addition, many potential riders remain unaware that options exist to serve their mobility needs.

Regional Mobility Management is one strategy that has been implemented in other states to gather the data needed to address gaps in transit services, coordinate efforts to create new and enhanced transit services, more effectively utilize the services that are in place, and improve mobility awareness and access. MassDOT aims to investigate whether establishing a statewide system of Regional Mobility Managers (RMMs) would improve mobility by benefiting those in need of transportation assistance and supporting the organizations that serve these constituents. This Regional Mobility Management study will provide MassDOT with a foundational understanding of Mobility Management, its implementation in other states, and how it could address the transportation needs and gaps identified across the Commonwealth.

The study incorporates findings from research on best practices in other states that have implemented similar systems, and it is supplemented by interviews with national stakeholders familiar with Mobility Management. Additionally, interviews with Massachusetts practitioners and discussions with focus groups highlight the existing transportation conditions and challenges faced. These conversations also provide more transparent insight into how a system of RMMs might be accepted and utilized by practitioners. The information gleaned from research and conversations with stakeholders throughout the Commonwealth ultimately inform the recommendations laid out in this action plan. Specifically, recommendations for implementing a RMM system are provided with regards to the number of managers, the role and responsibilities of a system of RMMs, the number of regions and regional coverage, hiring and training support, networking strategies, and performance measures to track the system's impact.

## Existing Conditions

Public transportation in communities across Massachusetts is provided by the Massachusetts Bay Transportation Authority (MBTA) and fifteen Regional Transit Authorities (RTAs) (Figure 1). These groups offer a range of fixed route and/or demand-response services for the general public, as well as ADA paratransit services for eligible individuals with disabilities. They may also offer additional services such as non-emergency medical transportation and microtransit on-

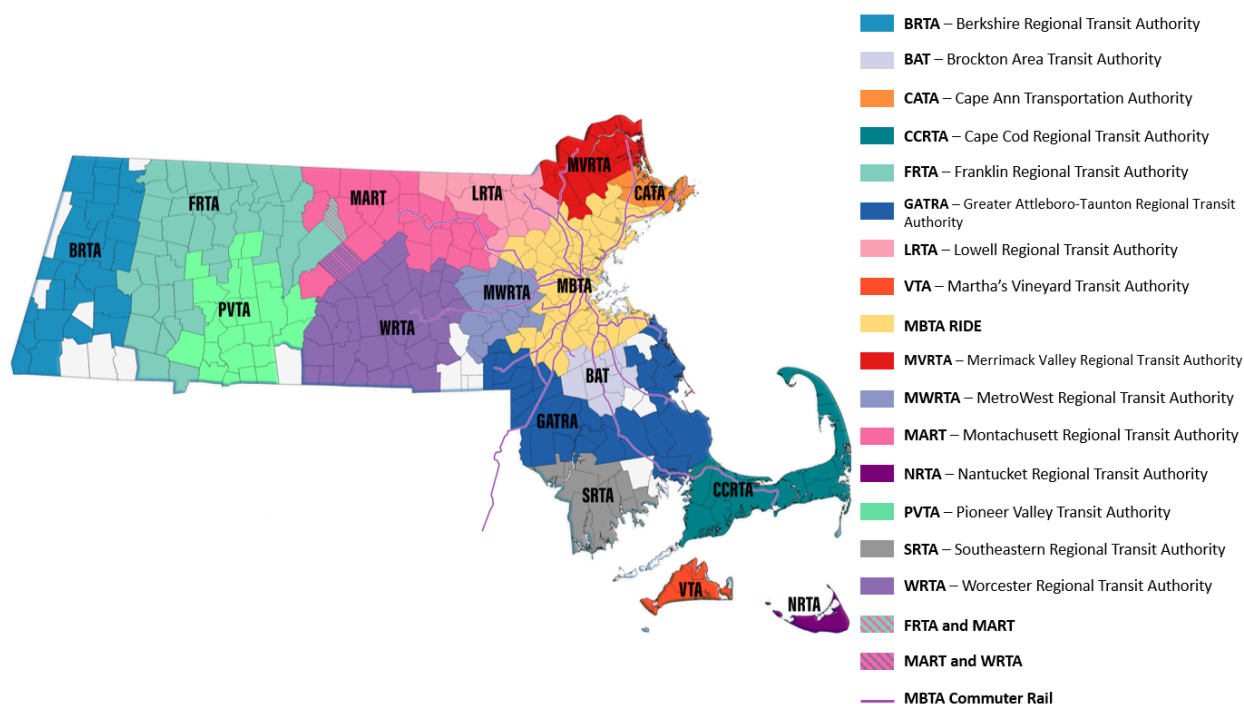


*Berkshire Regional Transit Authority vehicles in Pittsfield, MA (Source: AECOM)*

demand services open to all individuals.

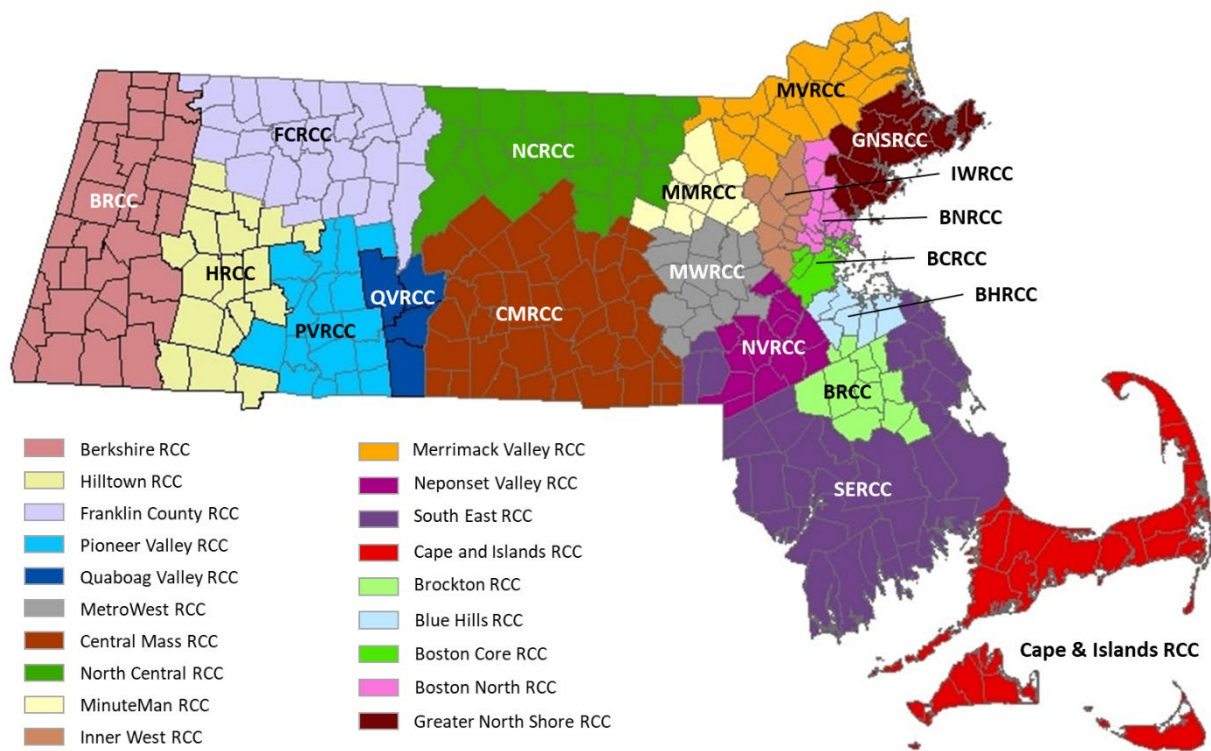
Regional Coordinating Councils (RCCs) seek to address the transportation needs of transit-dependent individuals; they combine the voluntary efforts of representatives from human service, transit, and planning agencies, consumers, and advocates. Municipalities can participate in multiple RCCs, and the services provided by each coalition are consistent with local priorities (Figure 2). The development of RCCs in MA came from the *2012 Final Report of the Community, Social Service, and Paratransit Transportation Commission*. This Commission grew out of Executive Order 530, which was issued in 2011 and instructed state agencies to work together to identify ways to improve the quality and efficiency of paratransit and community transportation services. However, after the Commonwealth changed administrations, shifting priorities and reduced support led many RCCs to stop meeting.

Figure 1. Transit Authorities in Massachusetts



Source: MassGIS 2023

Figure 2. Regional Coordinating Councils in Massachusetts

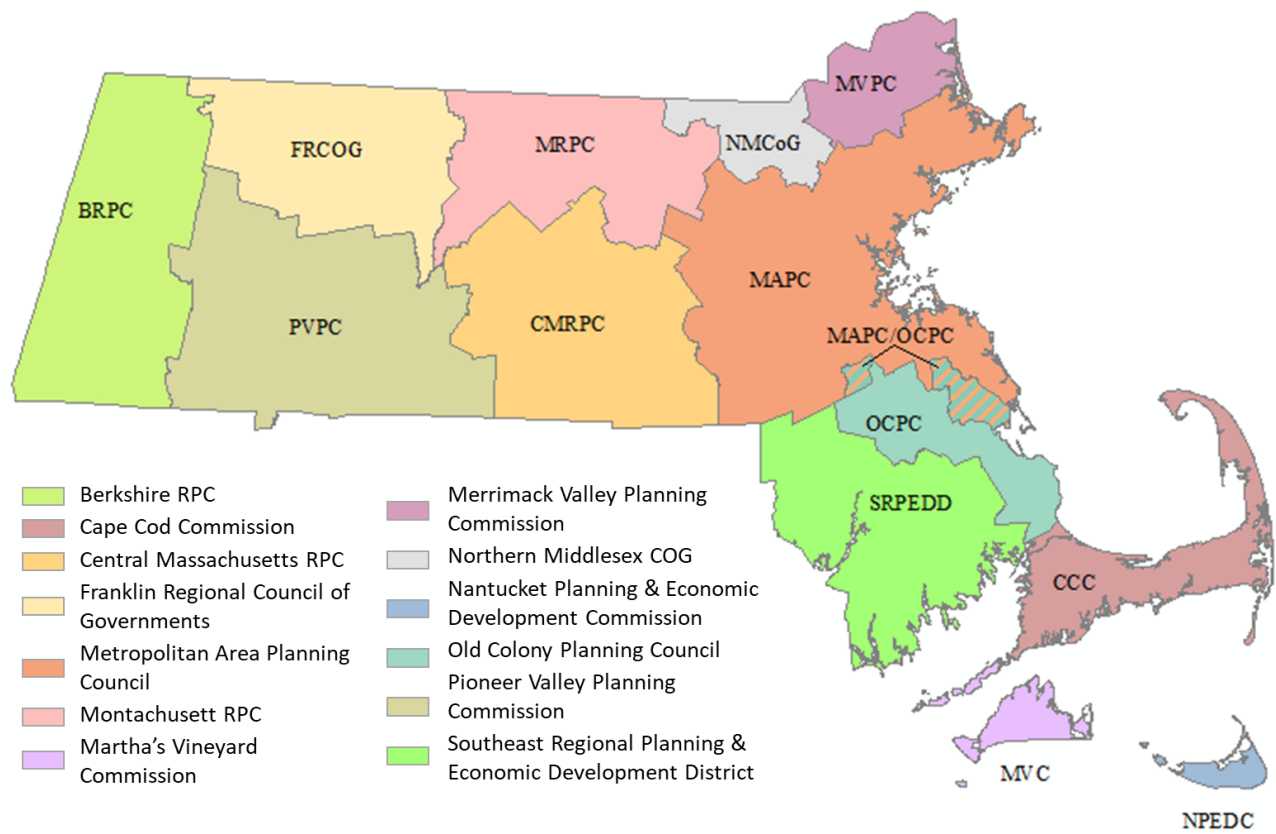


Source: MassGIS 2023

Regional Planning Agencies/Commissions (RPAs/RPCs) tackle a wide range of needs and challenges related to housing, health, financial well-being, and more. They also play the role of the Metropolitan Planning Organization (MPO), which develops regional transportation policy and is the designated recipient for various surface transportation funds which it then programs out to local governments and transportation entities. Transportation planners at RPAs/RPCs (and who work for the MPOs housed within them), also often support transportation and mobility improvements in other ways (Figure 3).

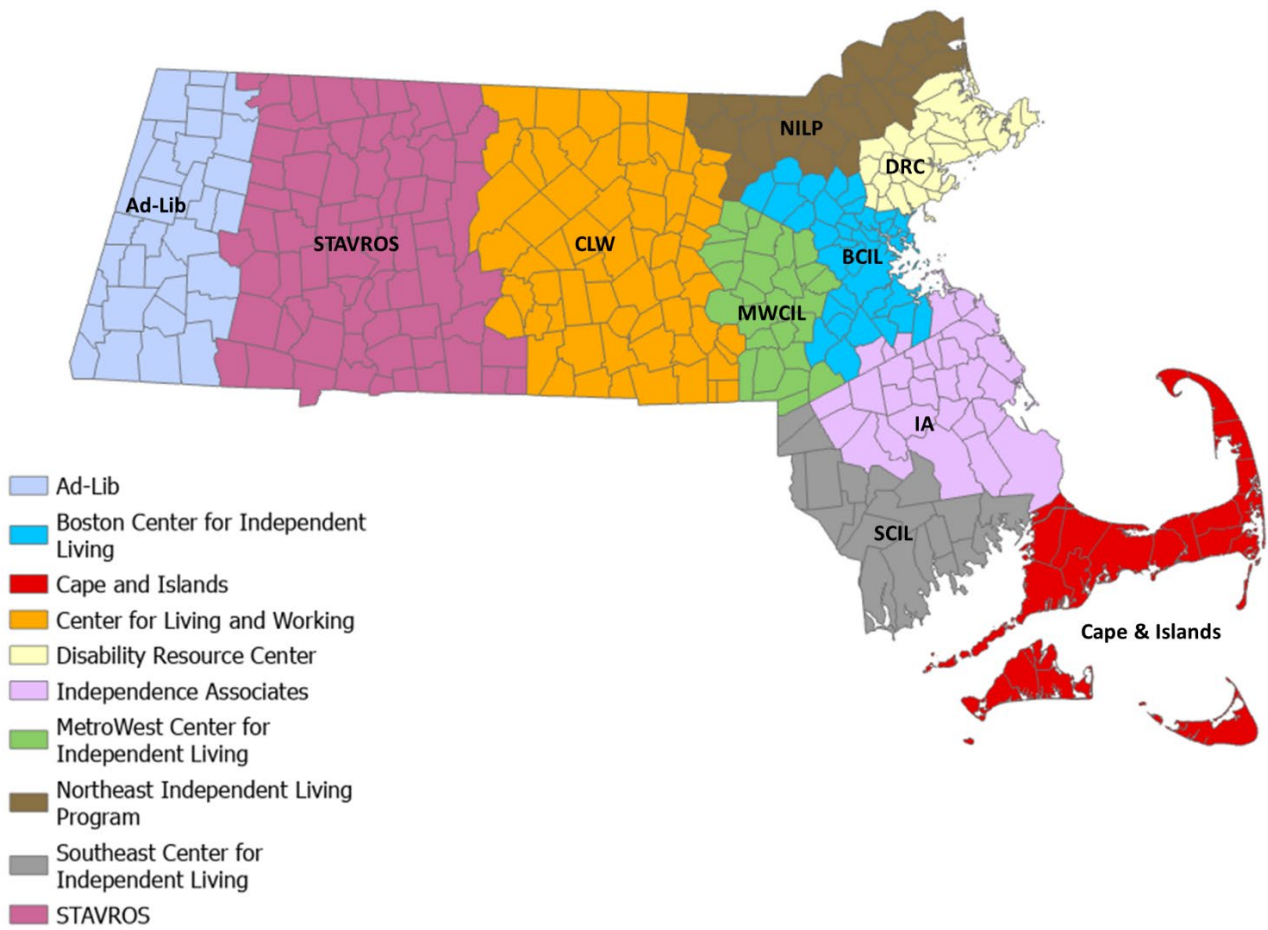
Other organizations, including Councils on Aging (COAs), Independent Living Centers (ILCs), and Aging Services Access Points (ASAPs), provide additional resources and services to support populations that may require more assistance – specifically older adults and people with disabilities (Figure 4; Figure 5). Municipalities across the state have a Council on Aging (COA) that offer services including those related to housing, transportation, nutrition, and health to older adults in each community, typically through the local senior center. On a more regional level, ILCs and ASAPs offer support and assistance with getting connected to available services. Additionally, community-based organizations and councils focus further attention and resources to serve transportation-disadvantaged populations in conjunction with efforts to address issues such as food security, housing, and financial stability.

Figure 3. Regional Planning Agencies/Commissions in Massachusetts



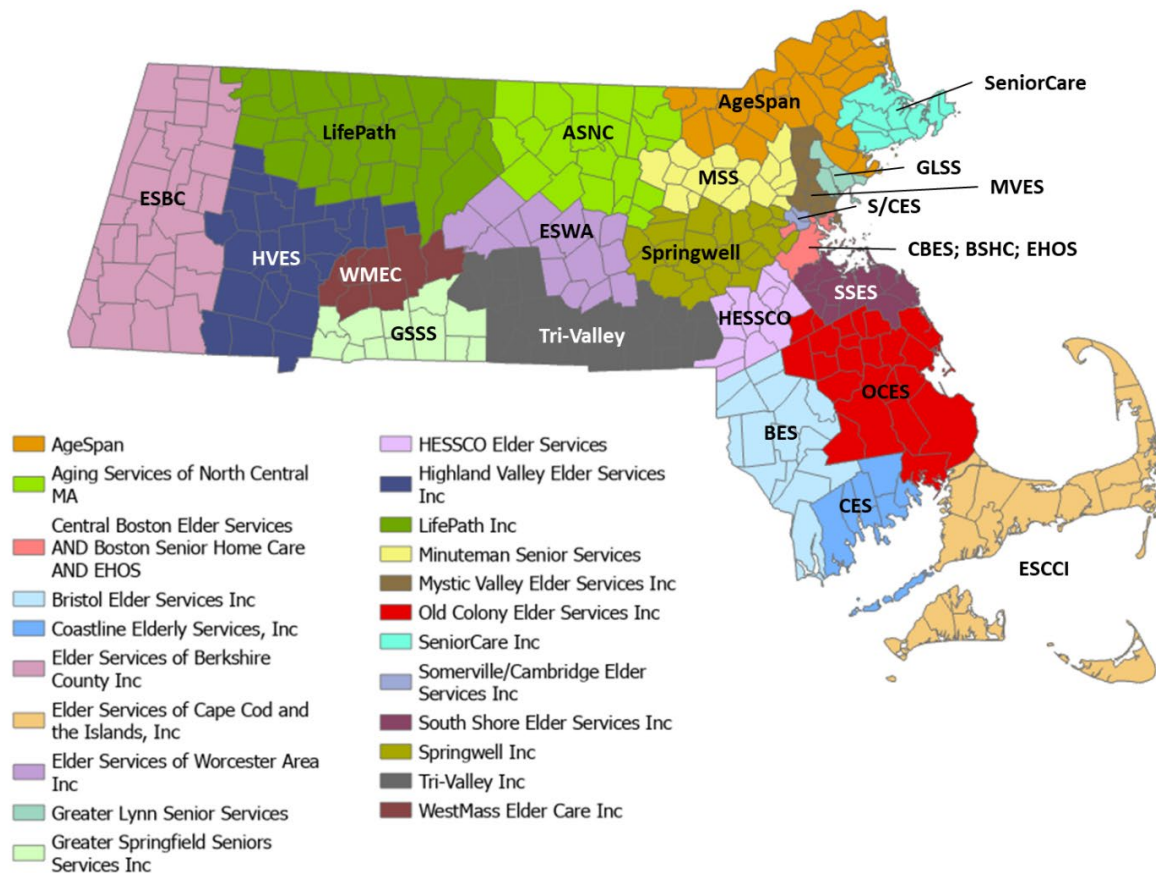
Source: MassGIS 2023

Figure 4. Independent Living Centers in Massachusetts



Source: AECOM 2023

Figure 5. Aging Services Access Points in Massachusetts



Source: AECOM 2023

## Regional Mobility Management in Other States

The project team explored the implementation and practice of Regional Mobility Management through a review of literature released by the National Center for Mobility Management (NCMM) and by the states of Wisconsin and New Hampshire. The literature review is supplemented by interviews with Regional Mobility Management practitioners in Ohio, Connecticut, Wisconsin, Virginia, and New Hampshire. The research provides insight into the role of Regional Mobility Managers (RMMs), the characteristics of existing RMM systems and current practices, the various challenges these systems have confronted, as well as lessons learned through the setup and management process.

A system of RMMs serves to connect people to any available transportation options they might need to reach a desired destination, regardless of geographic location, rider characteristics, or transportation mode. Most often, Mobility Managers focus their efforts on supporting the mobility of transportation-disadvantaged populations including older adults, people with disabilities, low-income individuals, students, and veterans. RMMs also assist transportation providers with the challenges they face in providing or connecting riders to existing travel options. Mobility Management thus seeks to improve transportation access from both the rider's and the provider's perspectives.

In a statewide system of RMMs, a manager can be employed by transit agencies, other transportation providers, regional organizations, and others. RMMs work “on the ground” to provide credible, up-to-date information for the communities they serve. These efforts can take many shapes: conducting travel training, engaging in outreach in locations where transportation-disadvantaged communities gather (such as low-income housing developments, senior centers, and job fairs), and answering phone calls from constituents who have questions about their transportation options. RMMs also work with their peers from other regions throughout the state to meet transportation needs that cross the boundaries of service areas, where possible. In this way, managers can identify gaps in service from the local level to the regional and statewide levels. They aim to address these shortcomings by partnering with entities beyond the transportation sphere, such as housing and healthcare providers, local governments, and elected officials. RMMs intend to build a common understanding of the current gaps in service and the value that robust transportation systems bring to each of their partners’ constituents. With this understanding, managers can collaborate with their partners to influence funding levels, share resources, and improve the efficiency of public transportation.

Mobility Management practices and programs are applied in numerous states across the country, often led by the public transit arms of the state DOTs or by member-driven associations. Common affiliates to the statewide systems include Aging and Disability Resource Groups, Rural Transportation Assistance Program groups, Section 5310 (Enhanced Mobility of Seniors and Individuals with Disabilities Program) grantees, as well as various non-profit organizations and public associations. The collaboration among these various entities is valuable to boost support and visibility for Mobility Management efforts. In addition, greater advocacy can draw increased funding from public and private sources, which highlights the need for sustainable funding from Federal and State sources.

The literature review and interviews with practitioners yield common characteristics of successful RMM systems. In general, a successful system:

- Is founded from a collaborative vision between transportation professionals, customers, and stakeholders.
- Focuses on the needs of communities and individual customers, with a particular emphasis on seeking to provide mobility options to transportation-disadvantaged populations – particularly older adults, people with disabilities, and low-income households.
- Values flexibility, innovation, and openness to feedback.
- Strives to improve connectivity between mobility options; facilitate the use of transportation services, especially for disadvantaged populations; and seek innovative solutions to issues.

The success of a Mobility Management program is also dependent on the characteristics highlighted in Table 1.

Table 1. Characteristics of Successful Mobility Management Programs

Characteristic	Example
<i>Partnerships between non-profits, private entities, and public agencies</i>	New Hampshire provides an example of a system of RMMs that involves health services-focused entities (i.e., HHS) in the mobility-focused efforts by linking Covid-19 challenges related to health with those related to transportation access.
<i>Performance measures, including quantitative and qualitative data, aligned with program goals that leverage successes to secure funding</i>	New Hampshire's blueprint outlined a preliminary set of performance measures to be regularly assessed and modified as needed to reflect changing needs and goals. Specific measures include costs breakdowns, passenger trip data, revenue hour and mile data, number of RMM collaborators, percent changes in individuals served, agency referrals, no-shows, and new funding, as well as customer satisfaction data. All states are required by FTA to submit a complete update every four years of coordinating agencies' Human Services Transportation Coordinating Plans, which must include an assessment of at least three performance measures for each established goal. Completing these Coordinated Plan updates allows eligible subrecipients of 5310 funding to be identified.
<i>Coordination that aligns with the practices of the Federal Coordinating Council on Access and Mobility (CCAM)</i>	CCAM promotes interagency cooperation coupled with stakeholder input as a foundational strategy in funding grant programs that subsidize human transportation services. Some states such as New Hampshire and Ohio mirror this collaborative model by having RMMs develop region-specific goals and convene to coordinate on a state-wide scale, and simultaneously having state-level coordination councils facilitate and manage the regional collaboration.
<i>Funding, most commonly from the Federal and state DOT level</i>	RMMs in Connecticut, New Hampshire, Wisconsin, Virginia, and Ohio are funded through 5310 grants.
<i>Complete geographic coverage aligning with existing geographic boundaries, with regions varying from state to state</i>	As a state with a higher population, Ohio has some singular regions served by multiple RMMs.
<i>A person or entity dedicated as a resource for RMMs</i>	Ohio and New Hampshire both employ a dedicated staffer who serves as a state-level mobility manager, which coordinates training, mutual support, and sharing of promising practices among RMMs. These activities help RMMs feel supported, and reportedly helps reduce RMM turnover and provides the flexibility and resources for hired RMMs to complete any necessary additional training. Virginia and Wisconsin both have non-profit associations that provide training and other resources for their RMMs.
<i>Regular communication, both internally and externally</i>	Four of the five states interviewed meet internally at quarterly roundtables to provide general status updates, discuss issues, and learn more about best practices from other mobility managers. Wisconsin and Virginia also host conferences to spread awareness of statewide transportation conditions, promote networking, and offer training. Additionally, Virginia maintains an internal website that includes a forum board for convenient RMM online interaction. The National Center for Mobility Management (NCMM) hosts a national forum board, called MyNCMM, that allows RMMs from any state to establish their own discussion group.

Exploring other states' experiences with Mobility Management provides valuable insight into common barriers and lessons learned that have emerged in developing these programs.

### Challenges to Developing RMM Programs

- Lack of public knowledge and MM visibility
- Financial security and siloed funding
- Limited training resources
- Lack of developed performance measures
- Limited coordination at varying geographic and operational levels
- High employee turnover rates

In facing these challenges, states have identified lessons learned and key goals other states should keep in mind when developing their Mobility Management programs:

- Build partnerships to reach a greater audience, expand public knowledge, and increase potential funding sources.
- Develop systems led and funded by state DOTs, as this reduces the need for agencies to fund or pool their own, often limited, resources.
- Develop training resources and a training curriculum to support the onboarding and growth of Mobility Management field professionals.
- Identify performance goals and measures from the beginning stages of the RMM system formation to immediately establish a performance assessment standard.
- Initiate coordination within and across regions by setting goals for team-building and forging relationships with other entities.
- Allocate higher wages for RMMs to hire and retain skilled staff.
- Hire a statewide RMM coordinator to help reduce the workload for RMMs and offer additional resources, training, and support.
- Seek support and communicate with RMM systems in other states to learn and benefit from their experiences and shared insight.

Mobility Management is a tool that states can leverage to aid in coordinating transportation services for all individuals. Systems of RMMs are particularly valuable to states with disjointed public transit systems and transportation operators that lack the internal resources to engage in extensive marketing or outreach. Developing a formal structure, operational reach, manager training, and public awareness of RMMs will support Mobility Management as a professional field in the transportation industry, and bolster mobility access on a statewide and national scale.

## Need and Propensity for Regional Mobility Management in Massachusetts

After investigating the current state of Regional Mobility Management nationwide, the Study Team engaged with stakeholders throughout the Commonwealth to observe their disposition towards adopting a statewide RMM system. To determine stakeholder sentiment, the Study Team conducted 60 interviews, led three focus groups— one for disability inclusion leaders (nine participants), another with

agencies serving older adults (35 participants), and a final for rural communities (nine participants) –, and administered a survey which garnered 26 responses (Table 2). Those engaged were provided with an oral and written overview of an RMM role and then asked a series of questions. The questions asked during these outreach sessions were:

- How does your organization and staff help provide transportation options to older adults, people with disabilities, low-income households, and others with mobility needs? / How does your organization and staff help connect older adults, people with disabilities, low-income households, and others with mobility needs to transportation options?
- What is your reaction to the idea of a Regional Mobility Manager system in MA?
- How could Regional Mobility Manager help your organization, your region, and the people you serve?
- Is there anything about a Regional Mobility Manager system in MA that you would wonder or worry about?

*Table 2. MA Stakeholder Interview Overview*

	Count	Region Types	MA Geography
<b>Interviews</b>			
Transit Authorities	14	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
RPAs	13	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
RCCs	8	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
COAs	7	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, central
ILCs	6	Boston, other urban, suburban, rural	MBTA service area, southeast, central
ASAPs	8	Boston, other urban, suburban, rural	MBTA service area, northeast, southeast, western, central
TMAAs	2	Boston, other urban, suburban	MBTA service area, northeast
Organizations Serving Low-Income Individuals	3	Other urban, suburban, rural	MBTA service area, Southeast, western

### Focus Groups

Disability Inclusion Leaders	9	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
Older Adults	35	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
Rural Communities	9	Rural	MBTA service area, Cape and Islands, northeast, southeast, western, central

### Survey

Web-Based Survey	26	Boston, other urban, suburban, rural	MBTA service area, Cape and Islands, northeast, southeast, western, central
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The stakeholder groups engaged by the Study Team can be divided into two distinct roles: those who provide transportation services directly to their community members and those who aim to connect the population they serve to transportation services. The former includes groups such as RTAs, COAs, and TMAs. These stakeholders report lack of connections within the existing transportation system, coordinating with other entities, and funding as the biggest challenges to providing transportation to their communities. The latter includes groups such as ILCs, ASAPs, and organizations that serve low-income individuals, which often refer their constituents to transportation services in the context of getting to medical appointments, going grocery shopping, getting to work, and more. These stakeholders cite education about existing services, lack of connections within the existing



**Lack of transit connections, challenges coordinating with others, and funding account for 44% of challenges providing transportation.**



**Education and lack of connections account for 46% of challenges connecting people to transportation.**

transportation system, and reduced access as the biggest challenges to connecting people with viable transportation options.

A system of statewide RMMs may be well-suited to address these challenges. Often, RMMs convene and facilitate coordination between transit providers and other entities to close gaps

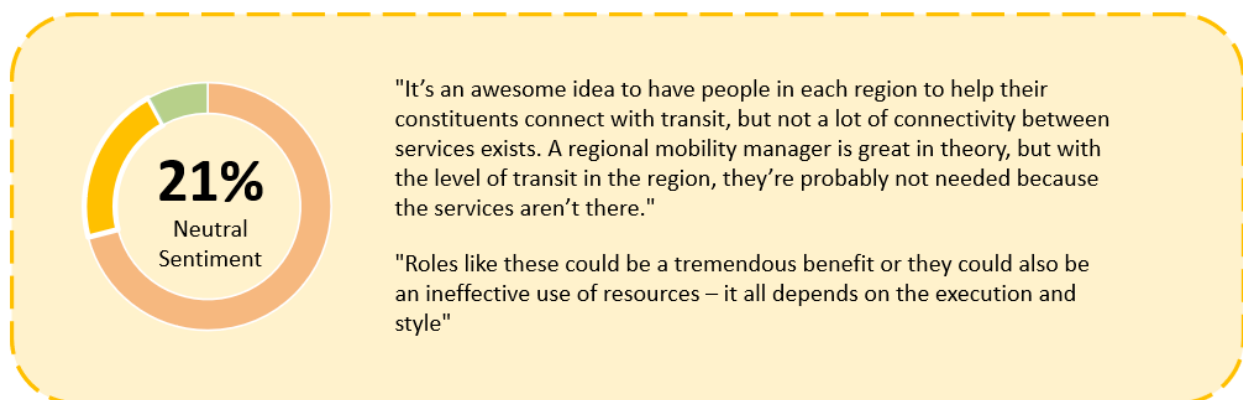
between existing services. One aspect of this work is creating a productive environment for service providers to discuss existing service, identify duplicative efforts, and align geographic or temporal boundaries to improve regional navigability. Another aspect of this work includes seeking additional funding, which can take the form of grant writing or advocating for changes to funding structure at the state level. Additionally, RMMs traditionally undertake substantial outreach and education roles, serving as a centralized resource that amasses and disseminates up-to-date information about public transportation.

## Initial Reactions: What do Stakeholders in the Commonwealth Think?

Stakeholder reactions to Massachusetts potentially rolling out a statewide system of RMMs are 71 percent positive, 21 percent neutral, and 8 percent negative.



Those stakeholders expressing positive sentiment agree that an RMM in their community would help to address some of the transportation challenges faced by their constituents. Having access to credible, current, and complete information is frequently mentioned as a benefit to implementing a statewide system of RMMs. Assistance with transportation education, marketing, and outreach are other areas where stakeholders identify value for the position. Additionally, stakeholders communicate an appetite for regionalization and increased coordination between transportation entities and other organizations.

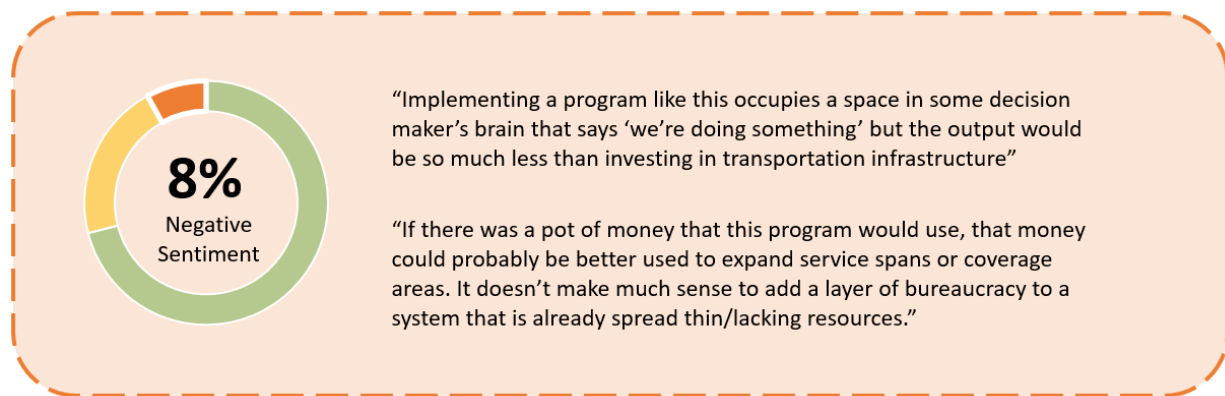


Stakeholders expressing neutral sentiment tend to think the idea of a statewide system of RMMs is good in theory, but converge around three main questions:

- Is there a robust enough public transportation system for a program like this to be useful?
- How will regions be established?
- Will the RMM have enough power or connection to change-makers to address the transportation gaps that community members identify?

Stakeholders from all geographic regions serving general populations, older adults, and those with disabilities are among the skeptical. Approximately 25 percent of RTAs, 30 percent of COAs, and nearly 40 percent of ASAPs express an overwhelmingly hesitant sentiment.

Of those expressing negative sentiment, the two primary concerns about a system of RMMs are (1) that the funding allocated to this program could be better spent on transit operations and (2) lack of trust in the longevity or efficacy of a top-down program. Negative sentiment is reflected most in stakeholders from the western and southeastern part of the Commonwealth. Additionally, two of the three (66 percent) of the stakeholders associated with low-income communities convey a negative sentiment about the effectiveness of a statewide RMM program; the remaining stakeholder working with low-income communities expresses neutral sentiment.



Despite the negative sentiments and concerns expressed by some stakeholders, most stakeholders are either in full support, or at least acknowledge the potential benefits of a statewide RMM system being implemented. The positive feedback and demonstrated interest in the potential of Regional Mobility Management is further detailed in the following section to clearly outline the range of opportunities a system of RMMs could present. Challenges to implementation are also assessed to encourage transparency and problem-solving in the earliest stages of the system's development.

### Opportunities for Enhanced Mobility

Stakeholders largely view a statewide system of RMMs as a tool that would benefit the communities they serve. The Study Team coded stakeholders' responses when asked how specifically RMMs could help improve public transportation or connections to transportation using keywords, such as "outreach," travel training," or "marketing." Each keyword was grouped with similarly themed responses. The example above is clustered under the theme "RMMs may act as an additional resource to RTAs that aid in ways beyond their current capacity" because the stakeholder responses indicate that these are helpful areas of expertise for RMMs that are currently lacking within respondents' communities. Six themes emerge from the survey, focus groups, and interviews (Figure 6), discussed below.<sup>1</sup>

<sup>1</sup> As stakeholders in western Massachusetts were more likely to express concerns around the implementation of a statewide RMM system, feedback from this region is not as common in this section.

Figure 6. Benefits to Implementing an RMM System in the Commonwealth (Key Word Mentions)



**RMMs can be agents of connection to enhance regionalization and improve coordination between silos.**

Seventy-three percent (73%) of Massachusetts stakeholders identify that RMMs have the potential to improve regional mobility by facilitating coordination between various transportation providers and other entities. Relative to the number of respondents from each geographic region, 64 percent of respondents primarily serving populations in northeastern MA and 67 percent of those primarily serving populations in central MA identify this benefit. Approximately half of responding stakeholders based on the Cape and Islands and in western MA provide similar feedback fitting this theme – 56 percent and 44 percent respectively. RTAs, RPAs and COAs are the most represented among the stakeholders identifying regionalization and coordination as a benefit of Regional Mobility Management. Of all the transit authorities interviewed, 11 out of 14 of them (79%) share this perspective. This is also the case for 11 out of 13 (85%) of RPAs interviewed and 7 out of the 7 (100%) of COAs surveyed.

RMMs are positioned to document the concerns and challenges of those seeking to use public transportation to move beyond an RTA’s service boundaries, as well as within those geographic

### Unmet Needs and Challenges

- Coordination between entities to connect transportation services and create better coverage
- Large number of transportation providers operating disjointedly
- Some transit authorities are short-staffed and struggle to address high-level issues

boundaries. With regard to how RMMs may be able to help the regions they serve, 31 percent of stakeholders mention that coordinating to connect gaps in the existing transportation network is a current unmet need. Beyond connecting prospective passengers with the resources they need to access existing services, RMMs can convene stakeholders such as RTAs, the DOT, health and human service organizations, TMAs, and others to coordinate more comprehensive service. In the words of one interviewee, “The biggest value add for [an RMM] would be if they acted as a facilitator for regional transportation planning/offered cohesive transfer planning. There are so many operators and providers that operate within their own bubble. Everything is very siloed...” Other interviewees note that transit authorities are often short staffed, focused on “putting out fires,” rather

than “function[ing] on this level.” Having a regional resource that takes on a higher-level perspective to identify issues – beyond that of day-to-day operations – and collaborate with key local, regional, or state players to address gaps is a much-needed tool for the Commonwealth.

With these perspectives, RMMs can work to create better coverage across RTA boundaries, identify any duplicative services, and work with providers to redistribute resources based on unmet travel demand patterns. Forty percent (40%) of the stakeholders engaged as part of this Study explicitly stated that helping people get rides across boundaries would be a valuable service for RMMs to provide, although this sentiment was shared more generally by most outreach participants. Several interviewees share anecdotes detailing the inefficiencies their constituents have faced when trying to navigate the “piecemeal” public transportation network to get to a location outside the service area of a single operator. Examples include riders taking trips lasting longer than two hours one way, having to walk long distances to transfer between routes, and being confused by navigating multiple fare systems. The mismatch between the service windows of neighboring RTAs is a source of confusion and inconvenience that further challenges the use of the public transportation network.

### Identified RMM Strategies and Benefits

- Facilitate coordination between multiple entities (73%)
- Close gaps in the existing transportation network (31%)
- Support mobility across RTA boundaries (40%)
- Share best practices (24%)

Twenty-four percent (24%) of stakeholders also indicate it would be helpful for RMMs to collaborate with peers to share best practices across the Commonwealth, to increase regional connectivity. One AAA/ASAP in central Massachusetts cites the Quaboag Connector as a shining example of innovative resource management to provide transportation services. He explains that it would be helpful to “learn lessons from other successful transit providers in the state... [because] it would be great to replicate something like that in [our] region.” Despite regions and transportation providers throughout the Commonwealth being different from one another, the challenges they face and their identified needs demonstrate similarities in underlying issues.

*Often, you find out that the problem you thought was unique is something that others face too. Everyone is in the same boat, struggling in the same areas... seeing the commonalities and understanding the issues at hand helps to improve the conversation.*

**An RMM can be a position with the power to address existing gaps in the public transportation network and provide better options.**

Nearly six out of every ten stakeholders who engaged with the Study Team recognize that an RMMs' ability to effectively improve mobility by addressing gaps and improving transit options within the Commonwealth would be tied to their power to generate change. With regard to how RMMs could help their constituents, 40 percent of interviewees indicate that those in the Regional Mobility Management role could be positioned to help identify and address transportation gaps. This could be accomplished through collaboration with other agencies (such as by agencies sharing a van and coordinating a needed service), writing grants to provide new services, or working with those at the state level to restructure funding for service provision. Providing better transportation options – something 27 percent of stakeholders want the RMM to have a hand in delivering – will require “a mechanism for empowerment,” states one interviewee. “[The RMMs] need to have the perspective and network to align grants and plans into a cohesive vision... [with the] teeth and action towards getting things done.”

Eleven percent (11%) of stakeholders describe the usefulness of an RMM as linked to their role as an advocate for their region. Through supporting improvements to public transportation services and access, further improvements can be generated related to enhancing quality of life, health outcomes, and independence. Another seven percent (7%) of stakeholders see RMMs' direct line of communication with the DOT as an invaluable asset to ensuring that the needs of their region are considered by people with the power to impact funding outcomes. As one interviewee notes, “the RMMs have the opportunity to be in the ear of people who inform funding decisions... They can be champions for their regions in ways that Needs Assessments and reports can't.” In addition to impacting decision-making at the state level, interviewees also feel it is valuable for the RMMs to build the relationships between local or regional stakeholders and those at the state level.

**Identified RMM Strategies and Benefits**

- Identify and address transportation gaps (40%)
- Deliver better transportation options (27%)
- Advocate for the region (11%), particularly via a direct line of communication with the DOT (7%)

*There's a perception that it's hard to coordinate with the giants [the DOT] – they're always the elephant in the room. It would be good for the RTAs and MPOs to feel like they had the ear of someone who has some level of influence or say about what goes on at the DOT.*

**An RMM could be a local, credible source of information that acts as a point person to answer questions and educate stakeholders.**

Thirty-six percent (36%) of all stakeholders engaged by the Study Team indicate that RMMs would be assets to their communities if the RMM were able to be the face of public transportation knowledge dissemination. Central and northeastern-based stakeholders are the most represented among the stakeholders holding this sentiment, accounting for over half identifying the point person and educator benefit of an RMM. Relative to the number of interviewed stakeholders serving each geographic region,

57 percent of those primarily serving the northeastern region of the Commonwealth highlighted this benefit, as did 42 percent of those primarily serving central and southeastern MA. highlight this benefit. For each of the other represented regions, responses specifying this RMM benefit account for 27 percent to 33 percent of each region’s total interviewed count. Thirteen percent (13%) of interviewees note that it would be useful to have a single point of contact to relay transportation information, with a similar percentage of stakeholders advocating that the RMM should be a local resident who is very familiar with the services.

*The benefit to having someone knowledgeable is that you can put that name on there – on websites, Facebook, Instagram, brochures – [and] that they become a mascot of sorts. The experience of calling one person, who you know is either going to pick up or return your call right away, is something that would make people feel more comfortable, especially if that’s the person handling all their questions, rather than redirecting them to three other numbers. That’s going to show people calling that their time is being valued and respected.*

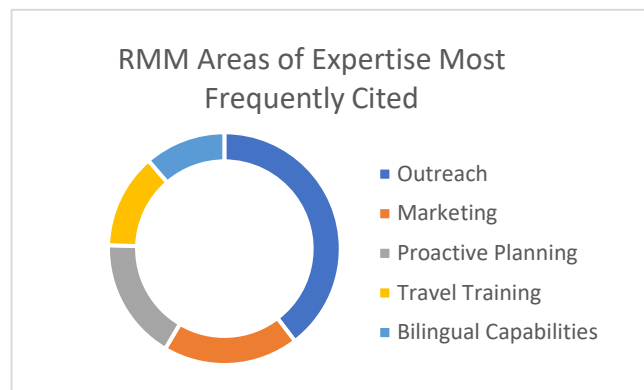
Identified RMM Strategies and Benefits
<ul style="list-style-type: none"> <li>• Serve as the face of public transportation knowledge dissemination (36%)</li> <li>• Single point of contact to effectively relay transportation information (13%)</li> <li>• A familiar local figure could establish trust (13%)</li> </ul>

In addition to ensuring callers feel respected and cared for, improving customer experience can help boost public transportation ridership and connect people with the services they need. As one interviewee states, the RMM as “a one stop shop would create a lot of time savings and avoid confusion” compared to current conditions. “When some people reach out and don’t get the answers they need, they shut down and don’t make the trip. People end up with missed medical appointments or feeling isolated because they couldn’t access the right information or services.” A credible, reliable source of information could thus help improve health outcomes, employment prospects, or improve socialization for callers.

**RMMs can act as a “free consultant” to RTAs by offering expertise and resources beyond their current capacity.**

Just over one quarter of interviewed stakeholders express that RTAs would benefit from having a dedicated resource that could offer time and expertise to efforts that the RTAs may not have the current staffing capacity to address. This sentiment was uniformly expressed across regions, except for the Cape Cod/Islands; approximately 25 to 33 percent of central, northeast, southeast, western, and MBTA regional stakeholders share this sentiment.

Regarding organization type, RPAs and RTAs are most represented in these responses. Comparatively, a total of one COA, two RCCs, two ASAPs, and one ILC include this benefit in their feedback. The predominant RTA representation in the responses supporting this theme stems from a common issue cited of RTAs lacking sufficient resources. “In general,” one interviewee says, “the more hands on deck the better. RTAs run pretty lean in terms of staffing. Most people who work at an RTA have their



hands in 5 different jobs, not just one.” Another agrees, saying that “staff end up wearing multiple hats and things like outreach or following up on phone calls can become deprioritized, what with everything else going on.” According to some interviewees, even at RTAs that are equipped with enough staff to do tasks beyond service provision, “there are always people that say, ‘Oh I had no idea you offered these services.’ So anyone that can help shed light on the services and connect potential riders with the right RTA or even multiple RTAs is going to be useful.”

### **RMMs can increase access to transportation and improve quality of life for all.**

Fifteen percent (15%) stakeholders convey that a system of statewide RMMs would increase access to transportation and improve the quality of life for all. The COAs, ASAPs, and ILCs, which serve older populations, people with disabilities, and other disadvantaged groups, are more represented among the stakeholders holding this sentiment compared to the RTAs, RPAs, and RCCs – approximately 70 percent of responses highlighting improved quality of life come from these groups. Geographically, 29 percent of southeastern stakeholders indicate this benefit, higher than the proportion of stakeholders from any other region.

RMMs as a “one stop shop” for transportation support resources can help limit the barriers to accessing information, improve customer experience, and boost public transportation ridership. As one interviewee reflects, “the people who are calling in to ask for help with transportation are already up against so much that any step someone could help triage or expedite is an enormous lift. It helps to level the field in terms of access.” Eight percent (8%) of stakeholders are hopeful that RMMs can advance equity in access to transportation and 3 percent believe that a statewide system of RMMs can increase access to job opportunities.

According to an interviewee who works with low-income populations:

*There is a lot of overlap between transportation and wellness, beyond just access to jobs or grocery stores. Someone in the Regional Mobility Manager role should be able to recognize overlap and expand programs. For instance, in domestic violence cases, it would be incredibly beneficial to have transportation that is confidential, gender-focused and meets a very niche need.*

Interviewees that work with elder and disabled populations note that “independent living is made much easier when people have access to affordable, responsive, reliable transportation resources.” They maintain that older adults should be treated with dignity, which includes having access to transportation services beyond trips to the grocery store or the doctor. Access to reliable, holistic transportation services are necessary to enable aging in place and living safely and independently. An interviewee shares the following anecdote:

*One of the people in the region who is 60+ knows she can get to the doctor if she needs it, but sometimes she wants to go to the movies or to visit her husband at the nursing home. She spent 50 years married to her husband but now she has to wait to see him until the weekend when her children have time to take her.*

#### **Identified RMM Strategies and Benefits**

- Advance equity in transportation access (8%)
- Increase access to job opportunities (3%)

## **RMMs can add the human touch aspect of interfacing with and addressing the needs of individuals.**

Ten percent (10%) of stakeholders see value in the RMM as a person rather than a web-based technology platform.<sup>2</sup> The total count of responses highlighting the human interface benefit of RMM is low – most geographic areas have between one and two stakeholders. Twenty-two percent (22%) of stakeholders from the Cape and Islands share this perspective, as do nearly 13 percent of those from Central MA. Similar to the identified benefit of improving transportation access and quality of life, the COAs, ASAPs, and ILCs make up most of the stakeholders holding the sentiment. Among their constituents, stakeholders often interface with older adults and/or those with disabilities, populations that may not have access or the ability to use computers. According to one stakeholder:

*Taking the digital divide into account, it would be very beneficial for folks to be able to connect with a live human, rather than trying to access information online. Sometimes the individual with questions may not have a computer or feel comfortable using it – in those cases, it's much more efficient to pick up the phone and call someone. Especially if that person is reliable and can develop rapport with the caller.*

Some callers may also need to spend more time on the phone with their region's RMM before fully understanding how to use the services available to them; several interviewees suggest that the person filling the position possesses "the soft skills/emotional patience that this role will require." Another interviewee concludes, "Ride Match was the first iteration of this project, but it needs a human touch. The services throughout the various RTAs are so complex that having an automated response to a rider calling with questions or trying to use a website with a chatbot wouldn't work."

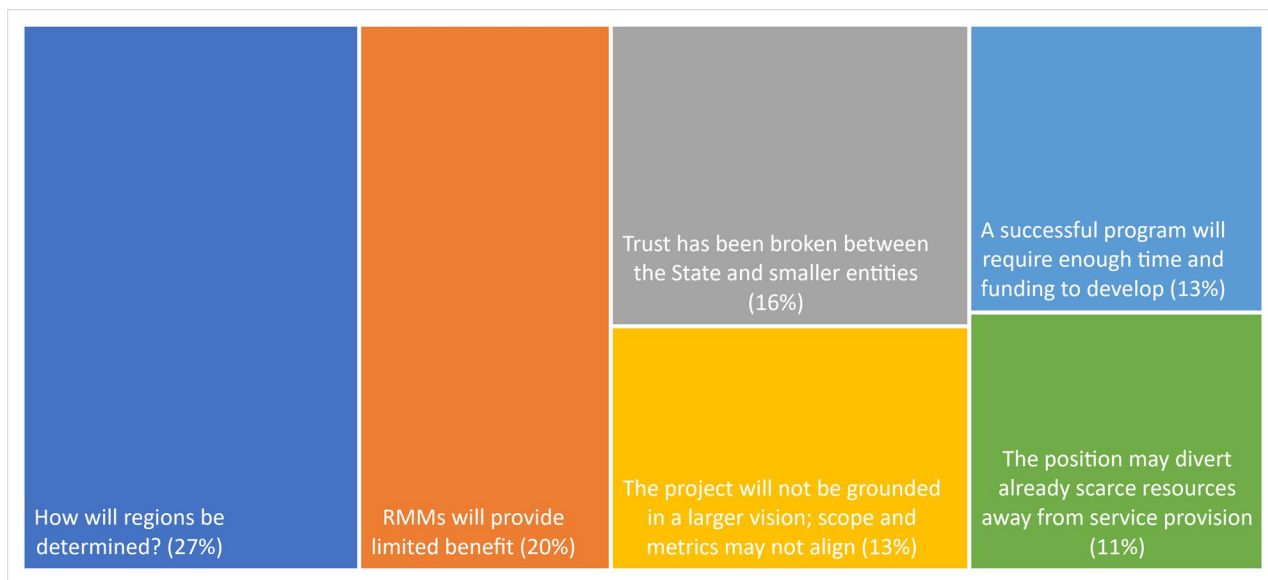
## **Challenges to Implementation**

Stakeholders are not without concerns regarding the effectiveness of an RMM system, including its administration and funding mechanisms. As with the previous section, the Study Team coded stakeholders' responses when asked what worries or concerns they have about a system of RMMs. Keywords were identified and then clustered under an overarching theme. For example, the key phrases "time," "sustainable funding," and "staff turnover," were clustered and assigned the theme: "The statewide system of RMMs may not come with enough time and sustainable funding to develop successfully." Stakeholder responses indicate that becoming familiar with the inner workings of a local transit system and building rapport with community members are time intensive efforts; if the RMM program has funding that only lasts a year or does not pay staff a reasonable wage, that could damage the effectiveness of the system. Six themes emerged from the survey, focus groups, and interviews (Figure 7), detailed below.

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<sup>2</sup> The stakeholders expressing this concern vocalized this sentiment independently or through the flow of conversation with the interviewer. A higher proportion of stakeholders may also share this sentiment, but were not expressly asked about their preference between a RMM or online platforms.

Figure 7. Concerns with Implementing an RMM System in the Commonwealth (Key-Word Mentions)



#### **“How will regions be determined?”**

Forty-three percent (43%) of stakeholders worry that the RMM regions created will be so large that rural locations will continue to be overlooked, managers may not be familiar with local services, and information will not be credible. One stakeholder asks, “There are so many existing boundaries and areas within the state, how would regions be developed? How would they be right-sized?” Their sentiment is shared by 20 percent of stakeholders, who are concerned that regions will either be too small or too large. Interviewees who worry about regions being too small question the financial sustainability of hiring comparatively more RMMs. They also question their effectiveness, in terms of successfully advocating for resources, avoiding service duplication, and working to improve regional mobility.

Other interviewees worry that an RMM in a region that’s large “will be spread too thin [and] they won’t be attuned to the needs of the local community.” Indeed, 18 percent of stakeholders raise the issue that each region is unique and needs a mobility manager that is local to the area. Just as hiring someone perceived to be an outsider raises concerns about the credibility of the information the RMM disseminates, so does managing an extensive region. Three stakeholders note that a larger region means the RMM must communicate with additional transit providers and stakeholders, which may make obtaining up-to-date information challenging.

Twenty percent (20%) of stakeholders worry about equity when determining region size and location. As one stakeholder states, “when regions get too big and the Commonwealth does things as a state, then the focus tends to shift east towards Boston.” Another echoes, “there’s come concern that ‘statewide’ means the state from Worcester east.” Five percent (5%) of interviewees explicitly worry that financial resources will be distributed to more populous regions, leaving the often larger, rural areas with less access to funding for service.

Stakeholders representing rural communities and those on the fringes of RTA service also worry about how regions will be established with regards to existing boundaries; regional alignment is vocalized by 7 percent interviewees as a concern. One interviewee notes that it would be foolish to “[set] up new regions for the sake of it. There are enough regions!” But aligning regions with existing boundaries, such as RTAs – a practice undertaken by other states that have adopted RMM systems – can result in issues.

Concerns Around a System of RMMs
<ul style="list-style-type: none"> <li>• RMM regional boundaries and size – too small / too large (20%)</li> <li>• Equity in region size and location determination (20%) and in statewide resource allocation (5%)</li> <li>• Unique regions require an RMM that is local to the area (18%)</li> <li>• Boundary alignment, such as with RTAs (7%)</li> </ul>

*Keeping the RTA regions would be an easy decision to make, given that it is an existing geography that aligns with transit service, but it would be a mistake. The point of a study like this is to bridge the gap between RTA regions. Housing the RMM at the RTA will further entrench the divide in service areas. The RMMs need to see the issues facing communities who are on the fringes of coverage areas.*

### **RMMs will have a limited benefit.**

Forty-four percent (44%) of stakeholders also express concern that RMMs will have limited benefit. These interviewees do not feel that the public transportation systems throughout the Commonwealth are robust enough to warrant a position whose primary role is to disseminate information about the limited service available. In the words of one interviewee, “how would they help connect people to resources that aren’t there?” The following reasons are also identified as barriers to the effectiveness of implementing a statewide RMM system:

- The RMM’s role will be duplicative (13%)
- Cooperation between stakeholders and sharing funding will be challenging to coordinate (12%).
- The RMM will not have an effective mechanism for implementing solutions to transportation problems (11%).

## Local and regional entities have a jaded perspective about programs originating from the State.

Twenty-eight percent (28%) of all stakeholders engaged during this Study indicate they would be hesitant to trust the efficacy of a top-down program or believe that other entities would be wary of such a program. Nearly one in five stakeholders emphasize the importance of buy-in from local communities and agencies to support such a large undertaking. As vocalized during the Older Adult Focus group and other interviews, stakeholders wonder if programs will take off in areas where the program feels like a mandate because the idea didn't originate locally. Twelve percent (12%) of stakeholders feel that a statewide RMM program is another (unneeded) administrative layer; one elaborates that

### Concerns Around a System of RMMs

- Distrust towards the efficacy of a top-down program (28%)
- Importance of buy-in from local communities/agencies (19%)
- Unnecessary added administrative layer (12%)

“standardization for the sake of standardization will not be met with enthusiasm, but something that clearly doesn't threaten... the RTA's resources is more likely to be embraced.” In addition, several stakeholders acknowledge that incorporating feedback is a good method for the State to generate buy-in.

Stakeholders expressing the most critical reaction to the idea of implementing a statewide RMM system are those who feel as if trust has been broken between the State and smaller entities. Examples of this sentiment include one interviewee who calls the program one more of the “endless

studies that lead to no results.” Another echoes:

*There have been repeated conversations about creating transportation programs or setting aside funding for low-income individuals looking to get to work that have not amounted to anything. Folks from [the stakeholder's organization] have been part of these conversations, made presentations, and nothing has come of it, so [we] don't trust that anything will change because that has historically not been [our] experience.*

## The project may not be grounded in a larger vision, leading to a scope for the position and program metrics that are incompatible or unrealistic.

Approximately one out of every four stakeholders engaged during this Study notes that a program of this magnitude requires significant forethought to ensure that the scope of the position and the metrics for success are realistically defined. Without a clear understanding of the broader goals that a system of statewide RMMs aims to achieve, 19 percent of stakeholders worry that the scope for the RMM role may be ambiguous and 4 percent worry that the manager will not have the capacity to carry out the job's responsibilities.

### Concerns Around a System of RMMs

- Significant thoughtful planning required (26%)
- Ambiguous scope for the RMM role (19%)
- Insufficient capacity (5%)

Interviewees offer varying perspectives with regard to establishing thoughtful goals and metrics. There is consensus that RMMs in different locations throughout the Commonwealth “will look slightly different because the regions are different, as are the communities that they're trying to serve.” Some interviewees state:

*Not everyone [should] have the same goals, but the goals should be parallel to ensure that the system is building uniformly and across the state... [The statewide, centralized] entity shouldn't act as a watchdog or a guard, but more of a mentor that understands how all the pieces fit together and can help with coordinated planning/problem solving.*

Many interviewees also touch on the need for both quantitative and qualitative metrics. One interviewee explains, “a parameter to consider for measuring equity and accessibility is improving quality of life. Often, transportation metrics fall into the trap of looking at people as trips, rather than people going places.” As in interviews with practitioners from other states, stakeholders express the need for metrics to tell stories and “incorporate a human element.” For instance, the Quaboag Connector “takes people to their prenatal appointments and has enabled people the ability to leave abusive environments because now they have a way to get to work/earn an income.”



*A Quaboag Connector vehicle (Source: AECOM)*

### **The statewide system of RMMs may not come with enough time and sustainable funding to develop successfully.**

One out of four stakeholders are concerned that the limited nature of funding will undermine the effectiveness and longevity of an RMM program. One out of five interviewees express worry that the funding for this program would be one-time in nature or expire in less than five years. As one stakeholder explains, “it’s critical that the person in the [RMM] role stay in the position for a long time because of the amount of time it takes to ramp up (learn about all the services provided, get trained properly, build rapport with stakeholders, etc.).” Another elaborates:

*If funding [for the RMM system] ended right away, it would be like getting the rug pulled out from under you. Some of the customers who struggle to get outside of the service area talk about feeling forgotten or unimportant a lot of the time. It takes a lot of time to build their trust in someone. The person has to show that they’re consistent, that they’re working on behalf of those people, before they will bestow that trust.”*

What people really need, notes another stakeholder, is “a tool in their permanent toolbox.”

If funding is sustainable, interviewees note that the program still needs to be funded at an appropriate level to retain qualified staff. Each of the out of state practitioners and several of the Massachusetts stakeholders note high turnover as an issue, offering the following as rationale:

#### **Concerns Around a System of RMMs**

- Limited funding will undermine the program (25%)
- Non-sustained funding (20%)

- **Salary.** The characteristics of an attractive RMM candidate include a varied background and skillset, ranging from customer service skills, empathy, patience, persistence, and experience with marketing, outreach, planning, advocacy, grant writing, and more. In the words of one interviewee, “the cost of expertise is high.” Low wages can result in underqualified candidates or candidates that will soon look for higher paying roles elsewhere.

- *High burnout.* The emotional bandwidth required for the RMM role is high; practitioners from other states explain that managers often have to interface with frustrated individuals and field complaints with a limited ability to address issues. An RMM must be passionate about doing good for their community; as one of the Massachusetts stakeholders says, “it has to come from the heart.”
- *More attractive options elsewhere.* Some of the perks like higher pay or working fully remotely are not an option for this role.

**The RMM position may divert already scarce resources away from service provision or operations.**

Approximately one out of every five stakeholders worries that funding is a zero-sum scenario in which the resources allocated to the RMM positions would be better spent improving public transit service levels. One stakeholder representing transit providers sums up the sentiment appropriately:

*Ultimately the RTAs can’t compete with a new [RMM] structure for the same money. It’s two branches trying to accomplish the same thing and you may end up with worse outcomes for the community you’re trying to serve because those resources are split.*

Thirteen percent (13%) of stakeholders note that a statewide system of RMMs ought to be paired with additional funding for RMMs to address the transportation gaps they identify.

Concerns Around a System of RMMs
<ul style="list-style-type: none"> <li>• Funding should go instead to improving public transportation services and coverage (20%)</li> <li>• Need for additional funding to tackle identified gaps (13%)</li> </ul>

## Recommendations

The overwhelming majority of MA stakeholders interviewed feel that a system of RMMs could benefit people in need of transportation as well as the organizations that serve them. Therefore, the Study Team concludes that it is a worthwhile endeavor for MassDOT to establish a network of RMMs across the Commonwealth. Drawing from the extensive feedback from MA stakeholders and the findings from state peers, detailed recommendations related to goals and performance measures, system organization, hiring, and professional development are presented in the following section.

### Regional Mobility Management System Goals, Recommendations & Performance Measures

The following section provides overarching goals for establishing and implementing an RMM system in Massachusetts. Specific recommendations and performance measures for tracking system progress are discussed for each goal.

#### Recommendation 1: Obtain Sustainable Funding

Funding is a primary concern among MA stakeholders in terms of the consequences of both insufficient funding and funding diverted from already lacking transportation provision and operations. Indeed, it is the third most-cited need identified by stakeholders, after connections and coordination. The following

recommendations are intended to support the establishment of a reliable funding stream as well as a funding plan that sustains the RMM system in the long term.

**Recommendation 1a: Consider a balance between federal, state, and local level funding for an RMM system.**

There are inherent tensions tied to how an individual RMM is funded: funding through a local agency may suggest that the agency “owns” the manager’s time and can assign tasks to address the agency’s needs; funding through the state may suggest that the manager is disconnected from the local community and will do the state’s bidding. Blended funding from all three sources could overcome some of the perceptions noted above.

**Recommendation 1b: Identify Possible Funding Sources for the RMM system.**

While funding will be needed to administer and coordinate the system, MassDOT can partly use in-kind match for this purpose. Principally, funding sources are needed to pay for the RMMs themselves, as well as a state employee to oversee, coordinate, and facilitate learning among the RMMs. This Statewide Coordinator position would be very helpful in standing up the RMM program. The position could be full-time for the 1-2 years when the program is being developed and launched and then continue as a half-time position. Assuming about a dozen (12) RMMs, each making \$75,000 annually, approximately \$900,000 per year will be needed to pay RMMs. Assuming the Statewide Coordinator makes an equivalent annual salary, \$975,000 in total would be needed for the first 1-2 years to fund all salaries. The Bureau of Labor and Statistics reports that 61.8 percent of the costs incurred by state and local governments for employees account for wages, the remaining 38.2 percent of costs are related to employee benefits. Using this estimation, approximately \$606,000 would be needed to provide benefits for the RMMs and the Statewide Coordinator.<sup>3</sup> Including a full time Statewide Coordinator position and the 12 RMMs, yearly labor and benefit expenditure is expected to total \$1.58M.<sup>4</sup>

Additional needs for funding include training for the RMMs, travel, and expenses related to in-person networking events.

Possible Funding Sources:

Section 5310:

Enhanced Mobility of Seniors & Individuals with Disabilities funding, otherwise known as Section 5310, is a Federal Transit Administration-derived formula funding program that is provided to states and other designated recipients. It can be used to fund both capital and operational costs of providing transportation to older adults and people with disabilities when the transportation service provided is unavailable, insufficient, or inappropriate to meeting their needs. At least 55 percent of a recipient’s 5310 funding must be used for capital needs, and Mobility Management is considered a capital expense under the program.

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<sup>3</sup> US Department of Labor: Bureau of Labor Statistics. Employer Costs for Employee Compensation. March 2023. <https://www.bls.gov/news.release/pdf/ecec.pdf>

<sup>4</sup> Assuming the Statewide Coordinator position would drop to half-time after the first two years, approximately \$60,000 in annual expenses could be saved.

Given its purpose and the fact that it is a formula fund, meaning that allocation of funding to recipients is based on formulas set by Congress, Section 5310 is very reliable. While Congress could drastically cut down on or eliminate 5310 when it reauthorizes transportation enabling legislation, this is very unlikely given the program's existence since 1975 and the fact that many agencies and the people they serve rely on the funds.

Section 5310 is the obvious choice for MassDOT to consider for funding a system of RMMs. That said, one stakeholder expresses that other sources of funding should be identified so as not to take existing resources away from agencies that may depend on 5310 for vehicles and other allowed capital needs. While using a portion of MassDOT's 5310 funding on a system of RMMs would certainly divert it from being used for other needs, there is reason to believe that a system of RMMs would help agencies better share information on services as well as resources that would cut down on multiple agencies filling the same gap. A possible alternative or addition to 5310 capital funding would be to consider using part of MassDOT's allowed ten percent of the 5310 allocation it can use for administration to fund an RMM system.

#### Fair Share Amendment:

Another possible source of funding is from the recently passed Fair Share Amendment which amended the state constitution to allow for an additional four percent income tax on the portion of a tax filer's taxable income that is above \$1 million. The Fair Share Amendment is expected to bring in about \$2 billion annually, which must be used to fund public education and transportation improvements.

#### Federal Transit Administration Innovative Coordinated Access & Mobility Pilot Program:

While not a source of funding that could sustain an RMM system over time, the Federal Transit Administration's Innovative Coordinated Access and Mobility (ICAM) Grants program could offer MassDOT funding to launch an RMM system. ICAM grants "seek to improve access to public transportation by building partnerships among health, transportation, and other service providers." Specifically, the program provides funding to support "innovative projects for the transportation disadvantaged that will improve the coordination of transportation services and non-emergency medical transportation services." There is no minimum or maximum grant award. In the last round of funding, \$8.4 million was available over a two-year period.<sup>5</sup>

#### Other State Agencies:

In addition to these funding sources, MassDOT should engage other human services state agencies to discuss funding that they may have available to contribute to a statewide system of RMMs. This action has a logical nexus in that having access to transportation is critical to a person's wellbeing and livelihood.

The agencies and state offices that MassDOT should approach include:

- Massachusetts Rehabilitation Commission
- Executive Office of Elder Affairs
- Department of Public Health

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<sup>5</sup> FTA ICAM grants program: <https://www.transit.dot.gov/funding/grants/grant-programs/access-and-mobility-partnership-grants>

- Executive Office of Health and Human Services (EOHHS)
- Department of Developmental Services
- Department of Higher Education
- Department of Veteran's Services
- Executive Office of Housing and Livable Communities
- Executive Office of Labor and Workforce Development

Responsibility: MassDOT

Timeframe: 6-12 months

### **Recommendation 1c: Obtain Funding to Launch RMM System and Create Five (5) Year Funding Plan**

After funding sources have been identified that can sustain a statewide RMM system for the long-term, MassDOT should attain the funds and create a budget for the launch year of the system. MassDOT should also create a five-year budget to plan for sustainable funding over a significant period of time. Both budgets should reflect the cost of hiring the RMMs, getting them set up in their areas, training, educational, and networking opportunities, as well as administration of the system. The launch year budget should also include additional system set up costs and administration time.

Responsibility: MassDOT

Timeframe: Months 12-24 after initiation

### **Recommendation 2: Define Mobility Management Areas and Hire RMMs**

The Study Team discussed the use of different sets of geographic boundaries to serve as the Mobility Management regions, each covered by an RMM. Several geographic boundary systems exist in Massachusetts that could lend themselves to serving as the regions for a system of RMMs. In addition to having clearly defined regional boundaries, the RMMs will need to be hosted physically in their regions, ideally at agencies that are connected to or have clients who need transportation services.

Given the feedback acquired through the study, it is clear that there is not likely to be one group of agencies that would want to and/or have the capacity to serve as RMM hosts. While some stakeholders support designating RTAs as reasonable hosts for RMMs, others express concerns that the ongoing issue of lacking coordination between RTAs (and in some cases, the existing gaps between RTA boundaries) would continue to be overlooked.

Alternative geographic boundary systems for RMMs could be:

- Aging and Disability Resource Consortium (ADRC)
- Regional Coordinating Council (RCC)
- Independent Living Center (ILC)
- Regional Planning Agencies (RPA)
- Community Health Network Areas (CHNA)

In addition to the concerns around interest and capacity, ADRC and ILC areas in western and central MA are physically very large, which could be challenging for RMMs to cover. RCCs only currently function in

some parts of the state and do not have their own physical offices. Given these factors, designating ADRC, ILC, or RCC regions as Mobility Management regions and hosts would not be ideal, despite having clients in need of transportation services.

Although RPAs cover more manageable areas and have established offices, different RPAs vary in the work they are engaged in – for instance, some engage in work that serves older adults, while others do not. Therefore, it may be the case that some RPAs would be suited to and interested in hosting a RMM, while others would not.

Given these conditions, the Study Team recommends separating out these two functions and 1) Establishing geographic boundaries for RMM areas and 2) Determining host organizations for the RMMs.

**Recommendation 2a: Further study the boundary systems that already exist to determine RMM regional alignment.**

MassDOT should form a stakeholder taskforce to gather input, which could consist of two or three meetings. In addition to the regional boundaries previously mentioned, MassDOT could introduce others for consideration, such as the MassDOT highway district areas or county boundaries. Factors that should be assessed for each boundary system include a region's geographic size, population, overlapping transit service, transit service gaps, and town boundaries. Still, it is possible that no existing set of boundaries can or should be used for the RMM areas – a set selected by MassDOT and the taskforce might require certain modifications (such as combining the Cape and the Islands) based on the regional factors assessed. Given the various boundary systems already established and the potential for boundary modifications in the RMM system development process, the final number of Mobility Management areas is likely to fall between six and twelve.<sup>6</sup>

Responsibility: MassDOT

Timeframe: 12-18 months after initiation

**Recommendation 2b: Issue a Request for Proposals (RFP) for agencies to host an RMM to cover each Mobility Management area.**

The RFP process ensures that the most qualified organizations are selected. MassDOT should issue an RFP to solicit bids from organizations interested in hosting an RMM that would serve the area in which the organization is located. The RFP could set a limit of one host organization per Mobility Management region or allow for joint applications if agencies work closely together and/or share office space.

The benefit of this approach is that organizations that are truly interested in and knowledgeable about the needs of older adults, people with disabilities, and low-income populations will apply to host RMMs. This will assure that the host organizations will be supportive and dedicated to supporting the RMM's work. However, this process does not guarantee that the Commonwealth would be fully covered by

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<sup>6</sup> The number of RMM regions for Massachusetts is likely to mirror a blend of the existing geographical boundaries in the Commonwealth and those found in other states with successful RMM systems. Existing boundaries within the Commonwealth including transit authorities, RPAs, RCCs, ILCs, and MassDOT Regions range from six to nineteen regions, with an average and median of thirteen. The number of defined (non, project-based) regions in other states with successful RMM systems range from five to ten.

RMM services. For instance, the Commonwealth of Virginia uses an RFP process to establish Mobility Management within project areas and, as a result, some areas of the state are not represented. To address this potential shortcoming, MassDOT may consider structuring the RFP such that the application window does not expire for a region if there are no submissions.

Responsibility: MassDOT

Timeframe: 24-36 months after initiation

### Recommendation 3: Improve Coordination and Connections between Areas and Service Providers

The top two needs that MA stakeholders identify that they think RMMs could fulfill are to improve coordination between transportation providers and others who work with transit-dependent populations and to improve connections between service areas.

Between questions of scope and capacity, just over one in five Massachusetts interviewees express concern about the ability of one person to “do it all.” RMMs responsible for fielding questions from callers regarding transportation options, conducting in-person outreach, coordinating between stakeholders, and advocating for additional funding for enhanced transit services may have a heightened propensity for burnout, a phenomenon noted by out-of-state practitioners. The varied nature of these tasks also requires different skill sets; someone good at convening and facilitating collaboration between siloed groups may not have the level of patience or communication skills needed to explain how to navigate the local transit system for a caller with dementia.

The following recommendations are geared at addressing these needs.

#### Recommendation 3a: Maintain and Promote the Ride Match Website

Ride Match is the public-facing website that anyone who needs transportation services in Massachusetts can use to search for options.<sup>7</sup> MassDOT should make sure that Ride Match is updated on a regular basis and that it is promoted widely—especially to transit-dependent populations and the organizations that serve them.



*Ride Match website graphic.*

One fifth of stakeholders engaged as part of this Study express concern that the described scope of the RMM role—both fielding inquiries

<sup>7</sup> Originally created by the Greater Attleboro Taunton Regional Transit Authority (GATRA), Ride Match was later expanded to cover the entire state of Massachusetts.

from the public and working to improve coordination and fill gaps—may be too large for a single individual to undertake. During the research phase of this Study, stakeholders from Connecticut explicitly cite the creation of a uniform website listing up-to-date transportation information as a near-term goal, corroborating the value of such a tool. A clearly organized, user-friendly website that is used widely by the public could effectively reduce the RMMs’ workload by intercepting simple questions before a user calls the RMM in their area or the statewide call center (see Recommendation 3b). Given that the state already has the Ride Match website and that it is currently being updated, Ride Match is primed to fulfill this role.

Responsibility: MassDOT

Timeframe: Start after RMM system launch and continue as an ongoing role

### **Recommendation 3b: Establish a Statewide Staff for Fielding Community Transportation Inquiries**

Instituting a call center with staff that have up-to-date knowledge on community transportation options could serve as a resource dedicated to individuals who need rides, are unsure of how to find transportation, or are unaware of their transit options. Agencies that serve older adults, people with disabilities, or low-income populations could also use this resource to ask questions on behalf of their clients. The call center would essentially be the call-in option for people unable to use the Ride Match website to plan a trip or to get additional information not provided on the site. In combination with the Ride Match website, a statewide call center would be able to receive and address the majority of ride inquiries from the public.

The call center would require at least five staff members, each responsible for answering questions regarding their distinct geographic region; at minimum, the suggested regions are: metro Boston, northeastern Massachusetts, southeastern Massachusetts (including the Cape and Islands), central Massachusetts, and western Massachusetts. Tapping into existing knowledge, such as housing the call center within 211, could reduce perceived barriers for callers.

Responsibility: MassDOT

Timeframe: Start after RMM system launch and continue as an ongoing role

### **Recommendation 3c: Review Coordinated Public Transit-Human Services Transportation Plans that Cover Each Area and Compile Recommendations**

Metropolitan Planning Organizations (MPOs) are tasked with developing Coordinated Public Transit-Human Services Transportation Plans (CHSTPs) every four to five years in concert with the update of the Long-Range Transportation Plan (LRTP). The CHSTP identifies current transportation providers and unmet transportation needs of older adults and people with disabilities. It also provides strategies for meeting those needs and prioritizes transportation services and projects for funding and implementation. These projects are often designed to close identified gaps in service.

RMMs should review the Coordinated Plan(s) that cover their areas and compile a list of recommendations by priority. If more than a year has passed, an engagement process should be established between RMMs and MPOs, or other entities that created the plans, as well as other stakeholder such as transportation providers. The engagement process would allow RMMs to assist these groups as plans are updated, and to guide discussions around any changes.

Responsibility: RMMs

Timeframe: Start after RMM system launch and continue as an ongoing role

**Recommendation 3d: Establish Regular Meetings to Facilitate Coordination of Services**

RMMs should institute quarterly meetings (or additional meetings, as needed) and invite local transit authorities, human service organizations that provide rides, and other providers of transportation where RCCs do not currently exist. At these meetings, each agency should provide a brief update and their services, ridership, fares, etc. Other agenda items such as gaps in service identified by the CHSTP and other connection and coordination issues should also be discussed.

Responsibility: RMMs

Timeframe: Start after RMM system launch and continue as an ongoing role

**Recommendation 3e: Assist Transportation Providers in Coordinating Services and Closing Gaps**

Within the Commonwealth, improving connections between regional transit providers is identified as the greatest challenge facing transit-dependent populations. Stakeholders cite gaps in geographic coverage, service hours, frequency, and fare media between RTAs as significant barriers to using the state's public transportation system to move between regions. In addition to convening regular meetings between local RTAs and other transportation providers, the Study Team recommends that the RMMs actively engage with these groups with the explicit purpose of enhancing connectivity between the following target areas:

- MBTA Service Area + neighboring communities
- Rural areas + neighboring destinations
- Non-MBTA communities + urban hospitals

Doing so may reveal duplication in the allocation of resources, as highlighted by one stakeholder during this Study's engagement efforts: "[there is a need for] COAs do some regional dispatching. Right now, COAs operate in a silo, even though a lot of them go out of town for medical trips. They could be sending one vehicle instead of four while serving the same number of people." Efficiencies may be found through these conversations which would enable a vehicle or vehicles and their drivers to serve new routes. The same stakeholder also notes that convening these groups with an eye towards addressing service gaps may lead to creative vehicle use, "if a church has a vehicle that they only use on Sunday and Wednesday, but the COA needs to run grocery trips on [Tuesday], then there are opportunities for sharing."

Responsibility: RMMs

Timeframe: Start after RMM system launch and continue as an ongoing role

### **Recommendation 3f: Assist Transportation Providers in Identifying Funding Opportunities for New Services**

Eleven percent (11%) of stakeholders worry that RMMs may not have an effective mechanism for implementing solutions to transportation problems, and three percent of Massachusetts stakeholders would like to see RMMs assist local entities in seeking out and applying for grants. For these reasons, RMMs' scope of work should include a funding opportunities component. Multiple stakeholders emphasize the issue that RCCs<sup>8</sup> are great mechanisms for convening transportation parties to identify constituents' needs, but they lack the proper inclusion of decision-makers or funding abilities to address those needs. Individuals representing RTAs and other transportation providers also identify limited funding for service provision as the third largest challenge facing the current transit system, behind connections and coordination. Beyond advocating for increased funding at the state level, identifying and pursuing funding for new services is the primary vehicle for addressing the existing gaps in transportation for the target populations.

Responsibility: RMMs

Timeframe: Start after RMM system launch and continue as an ongoing role

### **Recommendation 4: Improve Access**

#### **Recommendation 4a: Identify Transportation Access Challenges**

As noted by interviews with out-of-state and in-state practitioners, people can have transportation options and still not be able to access them. In many cases, education is an issue; people aren't aware of their options, don't know where to look for information, or are anxious about "feel[ing] stupid by asking someone a silly question." In other cases, problems with language barriers, technology operations, or the accessibility of equipment for the elderly, disabled, or otherwise burdened passenger (such as someone carrying multiple bags of groceries) prevent would-be passengers from utilizing public transit. RMMs should engage in outreach, conduct surveys, participate in meetings, and research previous studies to determine the issues that face members of their community. After establishing a working set of needs, RMMs should work with local stakeholders, transit providers, and other advocates to address needs through increased coordination, best practices learned from other areas, and/or by pursuing grant opportunities.

Responsibility: RMMs

Timeframe: Start after RMM system launch and continue as an ongoing role

### **Recommendation 5: Share Knowledge**

#### **Recommendation 5a: Provide a Monthly Networking Opportunity for RMMs**

One in four Massachusetts stakeholders feel that the ability of RMMs to gather, learn from, and possibly apply best practices learned from their peers throughout the Commonwealth, as well as RMMs across the nation, would be useful for improving local and regional mobility. Of the five states interviewed as part of this Study Team's research effort, each reports meeting at least quarterly if not monthly. During these meetings, whether virtual or in person, RMMs are able to discuss the challenges they face, ask

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<sup>8</sup> While some RCCs are still meeting, it should be noted that many are no longer convening.

their peers for advice, learn of new trainings, and “take home” new ideas. For these reasons, the Study Team recommends monthly calls for RMMs in Massachusetts. Each call should have an agenda circulated prior to the meeting and should allocate time for each region to share any changes in local transit service, status updates regarding on-going collaborative projects, and discuss challenges or “wins” with their peers.

Responsibility: MassDOT

Timeframe: Start after RMM system launch and continue as an ongoing role

#### **Recommendation 5b: Provide Bi-Annual In-Person Educational Opportunities for RMMs**

In addition to monthly calls, the Study Team recommends that RMMs attend an in-person, bi-annual meeting that rotates locations throughout the state. Beyond training workshops, these meetings can serve as an opportunity for RMMs to build their relationships with one another, which can facilitate smoother communication between regions and a greater sense of interconnectedness. Wisconsin and Virginia each hold multi-day conferences for their RMMs, rotating the location of the meeting throughout different areas within the state. Interviewees from these states suggest that doing so makes the conference more accessible and gives RMMs the additional perspective of viewing first-hand how a different region operates. Virginia uses RTAP funds to cover the cost of travel for RMMs. Wisconsin uses the conference as an opportunity for new RMMs to fulfill the peer-sharing component of their certification process by presenting on a local project.

Responsibility: MassDOT

Timeframe: Start after RMM system launch and continue as an ongoing role

#### **Recommendation 5c: Create Internal Platform for Resource Sharing**

To ensure that RMMs are able to easily communicate with each other and share useful information, the Study Team recommends creating an internal platform accessible to RMMs. This is aligned with strategies employed by Virginia and Ohio, which have each created web-platforms to facilitate knowledge sharing between RMMs. They include resources such as training materials and a forum board for RMMs to ask questions. An internal communication platform with content specific channels – such as Microsoft Teams or Slack – could also provide the additional benefit of faster on-boarding for new hires, in the instance of staff turnover.

Responsibility: MassDOT

Timeframe: Start after RMM system launch and continue as an ongoing role

## Performance Measures

The Study Team recommends that RMMs report on metrics bi-annually to track the progress towards reaching the Regional Mobility Management Program goals. The following possible performance measures are grouped in themes. While it is likely that tracking all of these measures could be too onerous, many of them would be helpful in monitoring and assessing how RMMs are impacting the regions they serve.

### **Outreach**

- Number of outreach events by stakeholder group & audience count
- Number of Ride Match searches
- Number of call center calls

### **Transit Connections**

- Number of gaps identified in Coordinated Plans addressed
- Number of services coordinated across transit service areas

### **Quality of Life/Qualitative Data**

- Testimonials:
  - Accounts from older adults, people with disabilities, and people with low-incomes about their experiences getting rides

## Hiring, Developing, and Retaining Staff

RMMs in MA could help greatly in connecting people with rides, in coordinating between transportation providers, and in working with stakeholders to eliminate gaps in service. The recommendations outlining the responsibilities of the RMMs largely serve as the base RMM job description. That said, while a core set of roles and responsibilities for each RMM should be standard across the Commonwealth, a “menu of options” for additional roles is also critical to account for the diverse conditions across the state. Additional roles that RMMs could play if needed include:

- Travel training (including education, resources, and staff training)
- Providing client assistance in Spanish or another needed language
- Social media marketing

For a stand-alone MA RMM job description, see Appendix A.

The skills and knowledge that successful RMMs will need will be varied. These individuals should have:

- Local knowledge of existing transit conditions
- Experience working with older adults, people with disabilities, and/or low-income populations
- The ability to organize and convene meetings between stakeholders
- Research and/or grant writing skills
- Patience, empathy, and passion for helping their community

Building from best practices in other states, the Study Team recommends that newly hired RMMs be paired with a mentor and undergo an initial training sequence to further supplement their previous experience. As part of the professional development process, it is recommended that RMMs are given an orientation to the role and a review of the types of projects they are likely to encounter.

Massachusetts may consider mirroring Wisconsin's certification program, which consists of a three-track training curriculum wherein new RMMs can further their (1) management skills including grant writing, performance measures, and cost allocation, (2) professional skills including customer service, DEI initiatives, and Medicaid client-centered operations, or (3) elective program knowledge such as volunteer driver programs, procurement, and emergency management. The Wisconsin Association of Mobility Managers – the professional organization that offers certification – also requires that new RMMs participate in a peer-to-peer information sharing activity during their biannual, in-person conferences. New RMMs must typically give a 45-minute presentation about their regional program or project. Finally, new RMMs must pass a final examination that includes an essay question and open-book test. Facilitating a detailed training program will familiarize new hires with the demands of the role and build a solid foundation for RMMs to grow their skillsets.

Each of the practitioners interviewed from the five states with successful RMM systems identify high turnover among staff as a significant challenge. This sentiment is shared by Massachusetts stakeholders, of whom approximately one out of three are concerned that any RMM program implemented by the state might not have the time and funding to develop into its full potential. By ensuring a salary of \$75,000 – approximately 150 percent of the average per capita income in the Commonwealth<sup>9</sup> – the RMM program is more likely to attract and retain qualified candidates. Instituting a robust training curriculum and facilitating open communication between RMMs and a statewide manager may also prepare the RMM for the demands of the position and help to prevent burnout.

Learning from the lessons of other states with successful RMM programs and using the feedback gathered from stakeholders within the Commonwealth to adapt those wisdoms will enable MassDOT to establish tailored goals for enhanced mobility and implement a system that meets the unique needs of Massachusetts' varied regions.

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<sup>9</sup> US Census Bureau. American Community Survey: 2017-2021.  
<https://www.census.gov/quickfacts/fact/table/MA/INC110221>

## Appendix A: Sample Job Description

### **Region Name: Host Organization**

**Job Title:** Mobility Manager

**Location:** *Office Address*  
This position regularly travels throughout the region

**Role Type:** Full Time

**Salary:** \$75,000 Annually

### **About Us:**

*[Description of organization].*

### **The Role:**

Reporting to the *Name of Supervisory Position*, the Mobility Manager will:

- Provide outreach, information, education to people with disabilities, low-income individuals, older adults, veterans, human service professionals, students, and other populations in the assigned region.
- Create and distribute a variety of marketing materials to target populations regarding transportation related information.
- Build partnerships with key stakeholders to advance the mission of the Mobility Management Program.

### **Responsibilities:**

#### Outreach and Education

- Become familiar with all available transportation resources (public and private) that could be utilized by people with disabilities, older adults, and/or low-income individuals residing and/or working in the target area.
  - Assist with information sharing about these options
    - Assist with keeping Ride Match website up-to-date
  - Develop a plan to distribute collected information to target populations.
- Plan and conduct outreach events to target populations in the target region.
- Share information on transportation gaps with RPAs during CHST update process.
- Assist MPOs with outreach for CHST updates.

#### Coordination

- Review Coordinated Public Transit-Human Services Transportation Plans to compile and advance recommendations.

- Establish quarterly meetings between relevant stakeholder groups, including RTAs, human service organizations, and other transportation providers to facilitate service coordination.

#### Advocacy/Funding

- Advocate to constituents to demonstrate how community transportation supports people and enhances economic development.
- Research and pursue grant opportunities in partnership with local organizations for the provision of additional service to close gaps in the transportation system serving the target population.
- Maintain written records and reports in compliance with agency and funding source requirements.
- Use performance metrics to advocate for State-level funding for service to fill transportation gaps.

#### Information Sharing

- Participate in ongoing professional development.
- Participate in monthly meetings with Mobility Managers across the state to facilitate best practice sharing.
- Participate in bi-annual, in-person educational events.
- Maintain and actively contribute to conversation with other Massachusetts Mobility Managers..

#### **Experience, Knowledge, Skills, and Abilities:**

- High School Diploma required. Bachelor's Degree in Human Services, Rehabilitation, Psychology, Social Work or Transportation Planning or related field preferred.
- Two years' experience working with people with disabilities, older adult populations, and/or low-income individuals, preferably in community education/outreach programs.
- Experience working with transportation providers preferred.
- Local knowledge of existing public transit operations preferred.
- Bi-lingual in Spanish or **other regional specific language** preferred.
- Excellent customer service required.
- Able to communicate clearly in oral and written form on a constant basis.
- Able to work independently; utilize good judgment and possess a strong sense of initiative.
- Able to work on multiple concurrent projects with frequent interruptions.
- Depending upon assignment, must be able to work in a variety of settings, weather conditions and locations.
- Must have knowledge of internet-based social media, web design, and electronic design and publishing software programs as well as Microsoft Office. Proficient in Microsoft Word, Excel, and PowerPoint.
- Work a flexible schedule that may include early mornings, evenings, weekends and/or holidays.
- Valid Driver's License and must maintain a satisfactory driving record.

#### **Additional Information:**

FLSA status: This is an exempt position.

Full-time benefits include: **XX**.

**Organization Name** is an Equal Opportunity Employer. All applicants will be considered for employment without discrimination on the basis of race, color, religion, sex, sexual orientation, gender identity, national origin, age, veteran, or disability status. **Organization Name** is committed to providing access, equal opportunity, and reasonable accommodation for individuals with disabilities in employment, its services, programs, and activities. To request reasonable accommodation, contact **HR Contact Name, Phone Number, Email**.