**WELFARE PEER TECHNICAL ASSISTANCE NETWORK**

**Northern Shenandoah Valley Public Mobility Program Site Visit**
Front Royal, Virginia
Thursday, June 17, 2004

Technical Assistance Report

To assist States in strategically and creatively utilizing their Temporary Assistance for Needy Families (TANF) dollars, while yielding better outcomes for low-income families, Occupational Enterprises, Inc., (OEI) sought assistance from the Northern Shenandoah Valley Public Mobility Program for methods of addressing rural transportation issues in Southwest Virginia.

The Intelligent Transportation Society of Virginia developed the Public Mobility Session to assist human service transportation and rural transit service providers in implementing economically viable technology applications to improve public mobility. The Welfare Peer Technical Assistance (TA) Network sponsored a 1-day site visit to Front Royal, Virginia on Thursday, June 17, 2004, to allow OEI to study a successful rural transportation venture in the Shenandoah Valley of Virginia before they design their own approach.

**Purpose of the Site Visit**

After participating in an Administration for Families and Children (ACF) conference on rural partnerships, OEI formed a planning group to focus on transportation issues for rural persons in Southwest Virginia. While establishing a plan and a timetable, the Southwest planning group found a project in the Shenandoah Valley to visit and observe first hand.

Southwest Virginia is rural and mountainous with many rural roads. It can take 45 minutes to drive 20 miles in some of the counties. Dickenson County does not have one single mile of a four-lane highway. There is virtually no public transportation. The Welfare Reform program has a cars-for-work initiative to help participants who become employed purchase cars. DSS is searching for a way to expand this desperately needed program. It is not helpful for the TANF program to have participants employable and employed if they cannot get to the jobs. They are looking at the creation possibilities for an expanded cars-for-work program.

The target area for the needed transportation project consists of 11 rural counties with 2,746 active TANF cases in that area. Potentially every TANF recipient and his or her

family could benefit from an integrated transportation system.  All 11 jurisdictions would be included in the implementation and both the DSS offices and the Welfare Investment Act (WIA) One-Stops would be included.  The service area includes 11 jurisdictions (9 counties and 2 towns). This project could benefit senior citizens, residents of public housing, TANF clients, clients of the Department of Rehabilitation, Community College students, among others.  They are committed to a one-year implementation schedule of lessons learned during the site visit.

**Introduction to Region – Stephen Kerr, Northern Shenandoah Valley Regional Commission, Front Royal, Virginia**

Stephen Kerr of the Northern Shenandoah Valley Regional Commission welcomed staff members from housing or human service agencies in Richmond and four Southwestern Virginia counties (Lee, Wise, Washington, and Russell), along with two officials from the Administration for Children and Families in Washington, DC.  Most of the officials came to seek technical assistance for creating their own public mobility program to serve their human services clients, based upon the successful transportation assistance model created by the Northern Shenandoah Valley Regional Planning Commission.  (The Commission's role in the transportation project, Mr. Kerr later explained, has been to actively support it by promoting it locally and to various State and Federal agencies; to assist in program planning efforts; to assist with grant management; to seek new funding sources; and to coordinate the program's efforts with other transportation planning efforts in the region.)

Mr. Kerr explained that the Northern Shenandoah Valley Public Mobility Program evolved gradually from a regional transportation technology study, jointly funded six years ago by the Federal Highway Administration (FHA) and the Virginia Department of Transportation (VDOT).  The 1998 study analyzed existing transportation systems in the region to determine whether enhanced collaboration among the region's public, nonprofit, and faith-based transportation providers, along with more effective use of available technology, could boost transportation efficiency for human services clients and other vulnerable residents of the Northern Shenandoah Valley.

The service area for the prospective public mobility program that eventually emerged from the study (and from a subsequent, in-depth research study on transportation trends and needs in the Northern Shenandoah Valley) included the city of Winchester (where some public transportation is available), along with Frederick, Clarke, Warren, Shenandoah and Page Counties.  The sprawling, largely rural, region in the northern tip of Virginia has a combined population of approximately 185,000 residents that are spread out across more than 1,650 square miles.

The primary goal of the proposed program was to substantially increase the number of free or low-cost transportation opportunities for families in the region transitioning from

welfare to work. The prospective service area has historically had limited public transportation resources. Moreover, traveling distances—to and from jobs, job training centers, medical and child care providers, and other important destinations for human services clients—are often far greater than they are in urban areas. (In this regard, the Northern Shenandoah Valley is hardly unique. At least forty percent of rural America has no public transportation.)

Mr. Kerr advised meeting participants that if they were to take a similar approach to closing the transportation gaps in their own community or region—particularly by cooperating and coordinating their efforts with other human services agencies—they presumably could produce similarly successful results. He left them with the thought that one of the most valuable "lessons" he has learned while helping establish and sustain the Northern Shenandoah Valley Mobility Program, is the importance of having a "lead agency"—not just to help set up such a program, but to keep it going as well.

**Historical Background of Northern Shenandoah Valley Public Mobility Program – Michael Hite, Northern Shenandoah Valley Regional Commission**

Michael Hite, a Northern Shenandoah Valley Regional Planning Commission member and project manager for the Northern Shenandoah Valley Public Mobility Program, said the transportation assistance program was created in response to the dearth of public or low-cost transportation options in the region, especially for rural residents who were transitioning from welfare-to-work; were handicapped, elderly or mentally disabled; or had recently been released from prison or another State or local institution. He said their limited mobility "threatened" opportunities—most importantly, for job training or jobs— that might otherwise be available to them. Mr. Hite summed up the challenge facing human services and public housing agency staff members in the Northern Shenandoah Valley and in other rural regions of the United States. "Without transportation," he asserted, "none of us can achieve our agency mission."

**Project Phase I (February 2000 to June 2001)**

In February 2000, said Mr. Hite, human services and public housing agency officials in the Northern Shenandoah Valley began discussing specific ways to coordinate and share their transportation resources in order to more efficiently meet each agency's very different transportation needs. The eleven initial stakeholders included the: Northwestern Community Services Board (serving as lead agency), Northwestern Workshop, Frederick County Department of Social Services, Warren County Workshop, Shenandoah Valley Community Residences, Access Independence, Grafton School, Shen-Paco Industries, Shenandoah Area Agency on Aging, Northern Shenandoah Valley Regional Planning Commission, and the Center for Transportation Studies at the University of Virginia (UVA) and Trichord.

In shaping the new public mobility program, stakeholders used information and insights gleaned from the 1988 FHA/VDOT study. They also received invaluable technical help from several other sources, including George Mason University's Institute of Public Policy, and one of their own: UVA's Center for Transportation Studies. The latter group collected transportation data from the other stakeholders and entered it into a software program (ArcView GIS) that graphically displayed existing routes, schedules, unmet transportation needs, and trip coordination opportunities. The results indicated there was a great deal of overlap and duplication of effort by public transportation providers in many parts of the Northern Shenandoah Valley. On the other hand, Mr. Hite observed, stakeholders also saw that everyone who participated in the initial, cooperative effort appeared to benefit from it: Their clients found rides more easily and by cooperating with other agencies they saved money. The stakeholders therefore decided to take the public mobility program to the next level by seeking and obtaining additional funding to create software tailored specifically to their regions, and their clients' diverse transportation needs.

**Project Phase II (July 2001 to June 2004)**

Early in 2001, a Request for Proposal was issued for a custom-designed software program that would allow stakeholders to more efficiently meet their own transportation needs, while enabling their fellow stakeholders to simultaneously accomplish the same objective. According to Mr. Hite, the contract was subsequently awarded to vendor RouteMatch Software of Atlanta, Georgia. The transportation software company was charged with developing, installing, and pilot-testing transportation coordination software for the Northern Shenandoah Valley Public Mobility Program. Specifically, RouteMatch was asked to create a Web-based, interactive software system that would allow participants to log onto the site and make online trip requests, schedule trips, and dispatch vehicles, in coordination with other stakeholders.

During the past three years, the software design and implementation process has progressed through several stages, and its final, operational test has just been completed. To get to this point, both stakeholders and software designers have had to work out numerous kinks in the new system, and to solve such recurring problems as scheduling conflicts, inefficient trip routes, overlap, and duplication of efforts. Mr. Hite stated that in the course of planning and testing the new system, stakeholders have learned a lot of valuable lessons; for example:

- Don't assume a common understanding of key concepts by all stakeholders.
- Allow plenty of time to resolve issues and make decisions.

- Don't underestimate the power of technology as a decision-making aid. Think of it as putting a tool into people's hands to help them help their community.
- Obtain external support for the project from every level of government.
- Don't be afraid to develop and test a "vision of implementation."
- Enlist a "champion"—an individual or agency willing to support and advocate for the project every step along the way; for this particular project, a county administrator has fulfilled this role.
- On the other hand, it's also important to build a "team"; in this case, several human services agencies joined forces with the regional planning commission to implement the project.
- Don't be afraid to make decisions—learning from trial and error is "okay."

At this point, Mr. Hite took questions from participants.

**Q:** Have you had any problems with liability issues regarding client injuries, lawsuits, that type of thing?

**A:** We've been fortunate—so far, we haven't encountered any of that.

**Q:** Would insurance be more costly because of the fact that some of the consortium's transportation clients are developmentally disabled?

**A:** So far, that has not created a problem.

**Q:** How about using church vans to transport clients when the church is not using them?

**A:** That's already happening.

Mr. Hite asserted that this "collaborative communications project" owes its success in part to public-private partnerships and in part to Federal and State incentives to coordinate efforts—for example, by providing financial assistance to those agencies willing to share use of their vehicles with other public, private nonprofit, or faith-based agencies in the Northern Shenandoah region, whenever their routes and schedules coincided and their vehicle had empty seats available.

Mr. Hite cautioned, however, that "coordination takes time," and that to implement such an ambitious transportation assistance program throughout a wide geographical region that is mostly rural, you will need a "champion"—an individual or agency willing to support and advocate for the project every step along the way. In Mr. Hite's words, "Agency leadership is critical." He noted that VDOT supported the Shenandoah Valley project, based on a local program's request for funding. He suggested that in order to grow and expand, the Shenandoah Valley program would need even more local agency

involvement and support. The same thing holds true, of course, for any other agency that hopes to establish a successful transportation assistance system in its own State or region. "Selling the concept to the public," the project manager observed, "is as important as the services you provide."

According to Mr. Hite, the newly implemented RouteMatch Scheduling Engine is powerful enough to let a logged-on stakeholder see where its vehicles—or those of any other participating agency—are at any given point in time. He said the software also is able to "automatically track pay issues"—that is, financial compensation and credits— related to ride sharing.

At this point, two audience members made comments about a psychological aspect and a bookkeeping aspect of the new program, respectively.

**1st participant:** In my experience, clients prefer to pay $.50 for a ride, rather than getting it free, because then they feel like they're on an "employment" bus, rather than a "welfare" bus. In other words, they want to be seen as workers being transported to their jobs, rather than as welfare recipients.

**2nd participant:** It takes a lot of work on the local side to make these collaborative projects successful. Every county is different; every county has a different billing system.

Another participant asked the following question:

**Q:** Is there a central dispatcher for all of these trips?

**A:** No. Each separate participating agency has a person charged with that responsibility.

**Q:** Have any articles been published on your program?

**A:** *Community Transportation* ran an article by Caroline March-Long called "Improving Rural Mobility and Accessibility in Virginia's Shenandoah Valley." (Note: A copy of this article was included in the informational packet provided to participants before the meeting began.)

Both operational testing and training of staff to use the new RouteMatch software system have recently been completed. Once the implementation grant from the Federal Transportation Administration is in place, the system will be officially launched throughout the Northern Shenandoah Valley. Once it is up and running, said Mr. Hite, the Commission will pilot-test a "smart card" and other technical enhancements. Already, the project manager claimed, 10 participating agencies using 100 vehicles are providing human services clients in the region with hundreds of rides every day.

**Participant Follow-Up**

Comments from the leader of the Southwest planning group suggest that the site visit was beneficial to OEI:

"Our group was pleased and excited about the Peer TA site visit with the folks from the northern Shenandoah Valley Public Mobility Program. We were treated as honored guests and gleaned much helpful information. Most importantly, we came away with renewed determination to succeed with our own project. Many thanks to our friends in Front Royal."