

E&D Annual Workplan Guidance for SFY2021 and FFY2021

Last amended 5/19/2020

Expectations for Regional E&D Committees have remained fairly constant for over a decade. Starting in 2019, the role the Regional E&D Committees started to shift, due to recommendations identified in the Vermont Public Transit Policy Plan. The need for more comprehensive data tracking, including customer service satisfaction levels was one recommendation. A rider satisfaction survey was implemented statewide in 2020.

Until 2020, Regional Planning Commissions (RPCs) and Public Transit providers looked to different documents for guidance on their roles and responsibilities with regards to the E&D Program and Committees:

- RPC expectations are written into the TPI (Transportation Planning Initiative) Guidance Document for FFY2021 (October 2020 – September 2021). The guidance is used by the RPCs to develop their annual TPI Program Work Plan and budget.
- For public transit providers the expectations for the E&D Program are contained within their contracts by a reference to the 2004 E&D Transportation Program Guidance.

Going forwards it is anticipated that the E&D Committees will continue to evolve to improve efficiencies, address deficiencies identified in previous Program assessments, and to move towards best practices. As such, two primary documents will define expectations for **both** RPCs and Public Transit Providers:

- E&D Transportation Program Manual (2020 update to the 2004 E&D Guidance). This manual provides the framework for the Program and focuses on operational level details. As a foundational document, it will be updated periodically as needed.
- E&D Annual workplan guidance. This guidance outlines specific roles, responsibilities, and tasks that are to be completed during the Federal Fiscal Year (FFY) contract cycle. RPC staff develop their annual workplan based on the TPI Guidance requirements. Public Transit Providers will also be expected to follow this guidance.

It is intended that for the FY2022 program, identical annual guidance will be included for both RPCs and Public Transit providers, clearly outlining the role of each entity and how it interacts. For FY2021, the guidance is still separate during the period of transition:

- The language below in black is what is written in the FFY 2021 TPI Guidance (October 2020 – September 2021) which was finalized in early April 2020 and distributed to RPCs in mid-April.
- The language in green is additional language to clarify the role of Public Transit Providers so they can understand expectations for their SFY 2021 contracts (July 2020 – June 2021) as well as additional tasks for RPCs.

Human Service Transportation Coordination (including Regional E&D Committees)

Deadline	FFY20 Rider Survey Follow up- June 30, 2021 Regional E&D Committee Workplan - June 30, 2021 Four quarterly regional E&D Committee Meetings – September 30, 2021 Attending Statewide E&D Summit – Date to be determined
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	E&D meetings held in accordance with Vermont Open Meeting Law – January 1, 2021
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RPCs shall work with the regional transit agency to organize and facilitate Regional E&D (Elderly and persons with Disabilities) Committees. These committees shall meet at least quarterly. All RPCs shall be the lead agency for these meetings. RPCs are responsible for ensuring these meetings take place and engage the full spectrum of providers of services and representatives of those needing rides.

An important consideration at these meetings shall be to identify gaps in the availability and connectivity of the transportation systems. Additionally, these meetings should provide the opportunity to facilitate discussions amongst public transit providers and their partners to develop infrastructure and operational solutions to provide the public and underserved populations (including elderly and disabled) with adequate access to essential services.

Continuing work from FFY2020, the RPCs will work with the regional transit providers and E&D partners to create a regionally specific E&D Committee annual workplan and associated goals and objectives, utilizing the workplan template provided by the VTrans Public Transit section. Workplan items could include:

- Defining the roles and responsibilities of the committee
- Developing a “How to add a new partner 101”
- Developing a mission statement
- Developing a “Welcome packet” or Ride Guide for new riders/clients
- Evaluating existing membership and identifying opportunities to add riders or local groups
- Developing an E&D service area map

RPCs will also help VTrans to track some basic information about the E&D Program. This will build upon work carried out during the FFY20 E&D survey. More details will follow, but example tracking topics include:

- Following up with clients who completed the FFY20 Rider Survey and “opted in” to provide additional information regarding their experience. This could be through additional survey, direct interviews, focus groups, etc.
- List of current participating E&D partners
- Collating client lists and reconciling between multiple providers if needed
- Developing methods to track unmet needs

Additionally, the RPCs will assist VTrans with the new annual E&D summit. They will assist with outreach and be a liaison to the E&D committees. An RPC planner must attend the E&D summit.

VTrans Role

- Update E&D Committee Guidance and relevant documents.
- Develop E&D Committee workplan template, inclusive of sample goals and objectives.
- Develop guidance for E&D Ridership Survey follow up.
- Distribute and review guidance document, and sample work plan at a regularly scheduled TPI meeting.
- Provide information about what basic E&D information needs to be tracked centrally
- Attend E&D Committee meetings to assist with E&D tasks as needed.
- Organize an annual E&D summit
- **Release an update to the 2004 E&D Guidance (Expected summer 2020)**

RPC Role

- Organize and facilitate regular E&D Committee meetings quarterly (at a minimum).
- Facilitate the development of Regional E&D Committee work plans, goals and objectives.
- Help VTrans with centralized tracking of some E&D basic information
- Facilitate E&D Ridership Survey follow up- method will vary by region but could include interviews, focus groups, etc.
- Ensure compliance with the Vermont Open Meeting Law for meeting announcements, minutes, etc
- Assist VTrans with organizing the annual E&D Summit

Public Transit Provider Role

- Provide transportation and track participation per the 2020 E&D Guidance (an update to the 2004 E&D Guidance which is due to be released summer 2020).
- Assist RPCs with regular E&D Committee meetings quarterly (at a minimum). Provide relevant information needed by the committee, such as updates on usage of the E&D program funds to date.
- Assist RPCs with the development of Regional E&D Committee work plans, goals and objectives.
- Assist RPCs with ensuring compliance with the Vermont Open Meeting Law.
- Assist VTrans with centralized tracking of E&D data, including, but not limited to:
 - Number of riders broken up by E&D Partners
 - Number of trips based on trip purpose and trip mode
 - Number of denied rides and reason and/or trip purpose constraints
 - Cost per trip, mile, hour by trip purpose and trip mode
 - Rider complaints with subset of driving or customer service related
 - Number of regionally coordinated trips with other Vermont transit providers
 - Number of trips provided with multiple funding sources i.e. Medicaid and E&D
- Assist RPCs with E&D Ridership Survey follow up- method will vary by region but could include interviews, focus groups, etc.
- Increase community outreach and marketing efforts to better educate the public on the E&D program. Invite community members to E&D committee meetings to better understand the transportation needs within the community
- Increase volunteer recruitment efforts to reduce trip costs
- Maximize regional trip coordination through Paratransit Dispatch software technology and statewide shared scheduling databases
- Maximize vehicle ridership capacity through more efficient Mobility Management tools

Deliverables

- RPCs will organize and facilitate a minimum of four (4) E&D Committee meetings by September 30, 2021
- Attend the Annual E&D Summit [DATE TBD] (Public Transit Providers and RPCs)
- RPCs will work with E&D Committee members to facilitate the creation of an annual; work plan, goals and objectives by June 30, 2021.
- RPCs will work with E&D Committee member to facilitate follow up with FFY20 E&D Rider Survey respondents who opted-in/volunteered to provide additional information on their experience by June 30, 2021.
- All Regional E&D meetings will be compliant with Vermont Open Meeting Law by January 1, 2021.

Appendix O – Draft Workplan for Elders and Persons with Disabilities Transportation Program Committees (E&D Committees)

This draft template is intended to assist the nine regional E&D committees with development of annual workplans that include some standard elements for more statewide consistency, but also allow for local flexibility in the operational procedures and agendas of each committee.

- I. Committee Background
 - a. Brief overview of committee’s purpose and scope: mission/vision, communities served, types of partner organizations, transportation services provided, leadership
- II. Partner Organizations
 - a. List of current partner organizations: Regional Planning Commission(s) (RPC), transportation provider(s), human service organizations, municipalities
- III. Roles and Responsibilities
 - a. Committee leadership: meeting facilitation, communication with partners
 - b. Meeting logistics: setting schedules and locations, development of agenda, preparation of meeting notes, meeting announcement/warning, publishing meeting notes
 - c. Meeting participation: expectations for participation by partner organizations, interested parties, general public, and current riders in scheduled committee meetings
 - d. Periodic reporting to partners on ridership, budget status, and other topics
 - e. Assist transit provides with preparation of grant applications for submission to the Agency of Transportation (AOT)
 - f. Allocation of funds among partner organizations
 - g. Development of contracts, MOUs, or other agreements with partner organizations
 - h. Transportation service delivery, including coordination with other transportation programs, such as Medicaid
- IV. Meeting Schedule
 - a. Planned schedule of committee meetings: minimum of four meetings per year
- V. Annual Agenda: Description of and anticipated schedule for ongoing activities that the committee will pursue during the coming year



- a. Assistance with transit provider's preparation of grant application to AOT
 - b. Allocation of funds to partner organizations
 - c. Adjustment to allocations among partners throughout or toward the end of the year
 - d. Adjustments to priorities among eligible trip types (critical care medical, non-emergency medical, adult day health, congregate meals, shopping, social/personal/wellness, other) and adjustments to trip limits, if applicable
 - e. Description of and schedule for reporting to partner organizations
 - f. Description of plan for communicating with partner organizations
 - g. Annual performance monitoring (additional details below)
- VI. Annual Performance: Description of goals and objectives and other activities that the committee will pursue during the year to address local E&D transportation issues and needs.
- a. Required items
 - i. Develop mission and vision statement
 - ii. Develop annual goals/objectives and other activities that will be implemented to achieve them, and anticipated schedule for activities
 - iii. Work with RPC(s) to distribute customer satisfaction survey to current riders of E&D services in FFY20, following model of Chittenden County E&D committee and United Way of Northwest Vermont. Conduct survey update annually thereafter using a smaller sample of riders.
 - iv. Assessment of unmet need among E&D target populations in the region following methodology developed by VTtrans and E&D committees
 - v. Develop and implement procedures for monitoring how needs are being addressed, and needs that are currently unmet
 - vi. Prepare 1-2-page overview of regional E&D program for use in new partner (Southeast Vermont committee example)
 - vii. Create 1-2 page Rider's Guide, and a longer one as necessary/ time allows, for riders to understand who to call, what to expect, etc.
 - viii. Work with AOT to prepare short video documentation of E&D riders' stories.
 - ix. Participate in biennial statewide E&D meeting
 - b. Optional items: examples of activities that could address local issues or move local goals/objectives forward are listed below. Other activities may be planned and implemented by individual E&D committees.



- i. Plan and implement events, activities to increase awareness of transportation options other than E&D services in the region. Examples include talks at senior centers, attendance at a caregivers training, talks at high school with classroom of people with disabilities, and participation in events sponsored by partners and other local organizations for older adults and people with disabilities to share transportation information.
- ii. Implement travel training for E&D riders to encourage use of fixed route services where appropriate. The Bennington E&D committee program or resources available from the Kennedy Center in Connecticut or the National Aging and Disability Transportation Center could provide program models and best practices.
- iii. Involve partner organizations in recruitment of volunteer drivers

VII. Annual Reporting

- i. Description of measures that the committee will use, in addition to currently required statistics that are identified in annual grant agreements between transit providers and AOT (unduplicated riders, unduplicated riders traveling to dialysis appointments, one-way trips by service category and mode, and unit costs) to track progress toward accomplishment of committee's agenda items and achievement of its stated goals and objectives for the year.
- ii. Work with RPC(s) to report measures to AOT, following procedures and schedules that will be developed by AOT

