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| Enhancing Mobility for People with Disabilities |
| An Evaluation of New Freedom Program Services Provided in 2009 |
| CES, Inc.  TranSystems  Prepared for Federal Transit Administration  Final Report  30 October 2010 |

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|  |  |
| --- | --- |
| COTR | Contracting Office’s Technical Representative |
| CTAA | Community Transportation Association of America |
| DOT | Department of Transportation |
| FTA | Federal Transit Administration |
| FY | Fiscal Year |
| GPRA | Government Performance Results Act |
| JARC | Job Access and Reverse Commute |
| LED | Local Employment Dynamics |
| LEHD | Longitudinal Employment-Household Dynamics |
| NAICS | North American Industry Classification System |
| MPO | Metropolitan Planning Organization |
| NF | New Freedom |
| OMB | Office of Management and Budget |
| PART | Performance Assessment Rating Tool |
| PPE | Program Performance Evaluation |
| SAFETEA-LU | Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users |
| TEA-21 | Transportation Equity Act for the 21st Century |
| USDOT | U.S. Department of Transportation |

***Acronyms***

Executive Summary

The New Freedom (NF) program provides funding for projects designed to reduce transportation barriers and to expand transportation mobility options available to persons with disabilities beyond the requirements of the Americans with Disabilities Act (ADA) of 1990.

FTA contracted with Commonwealth Environmental Services, Inc. (CES) and its subcontractor, TranSystems, to manage data collection and analysis for the FY 2009 JARC / New Freedom (NF) Program Performance Evaluation. Grant recipients submitted reports on JARC- and NF-funded services using a set of online forms. This report presents findings for the New Freedom program only. Findings for the JARC program are presented in a separate report.

## Highlights for FY 2009

A total of 128 grant recipients submitted complete reports for 487 New Freedom-funded services in FY 2009. Key findings include:

* New Freedom-supported services provided 2.4 million one-way trips, an 89% increase over FY 2008
* Out of the active NF-funded services, trip-based projects made up just over half of the funded services (54%). Information-based services made up 28% of projects and capital investment projects, 18%.
* Demand response was the single most funded service, accounting for 24% of all services and providing 424,462 one-way trips (17%)
* Mobility manager contributed the most NF-funded one-way trips, 669,833, or 28% of all trips
* Demand response and mobility manager made up the largest share of total services provided, accounting for nearly 40% of the total services
* Among trip-based services, demand response, same day ADA paratransit, and aide/escort assistance were overwhelmingly operated at the county level
* Funded services continue to shift toward large urbanized areas, up from 28% in FY 2007, to 42% in FY 2009
* About 52% of services with a primary goal of *expanded geographic coverage* were demand response, 20% were fixed route, and 9% were vehicle for transit agency

## Program Performance Measures

FTA has established several key performance measures for the New Freedom program:

* Increases or enhancements related to geographic coverage, service quality, and/or service times that impact the availability of transportation services for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year
* Additions or changes to environmental infrastructure (e.g., transportation facilities, sidewalks, etc.), technology, and vehicles that impact availability of transportation services as a result of the New Freedom projects implemented in the current reporting year
* Actual or estimated number of rides (as measured by one-way trips) provided for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year

For New Freedom **demand response**, recipients were asked to report the following:

* Within the existing ADA paratransit service area, **number of service hours added** for weekday, Saturday, and Sunday/holiday service
* Outside the existing ADA paratransit service area, **number of service hours added** for weekday, Saturday, and Sunday/holiday service

For New Freedom **fixed route, flexible, and shuttle/feeder services**, recipients were asked to report the following:

* **New miles** added to route (based on one-way route length in miles) for weekday, Saturday, and Sunday/holiday service
* **Percentage increase in miles** (total route length divided by new miles) for weekday, Saturday, and Sunday/holiday service

The majority of New Freedom-funded programs can report one or all of these measures.  However, NF grants also support programs like one-stop centers and wheelchair lifts that provide indirect benefits. To ensure that these programs are represented in the overall analysis, FTA established a protocol for reporting on JARC and, later, New Freedom services. With the assistance of the JARC / NF Advisory Committee, which includes representatives from transit agencies, metropolitan planning organizations, and state DOTs, the consultant team developed a reporting matrix for capturing relevant information about the range of JARC and NF services. The matrix asks grant recipients to categorize their programs based on two criteria: project type and primary project goal.

The reporting matrix includes three basic project types:

* **Trip-based services**, which provide transportation directly to individuals
* **Information-based services**, which provide information about transportation services to individuals but do not provide direct transportation services
* **Capital investment projects**, which include facilities and infrastructure to support transportation services

In keeping with Federal reporting requirements, the five primary program goals are:

* Expanded geographic coverage
* Extended service hours or days
* Improved system capacity
* Improved access/connections
* Improved customer knowledge

After selecting a combination of service type and primary goal, grant recipients are directed to select the corresponding matrix cell in the service matrix. Each cell identifies the type of service output data to be provided by the reporting grantee. The output measures typically include the number of one-way trips for trip-based programs, the number of customer contacts for information-based services, and the number of units provided for capital investment projects. In some cases, grantees are asked to report descriptive information.

## Service Profiles

Finally, FTA continued to collect program profiles, or summaries, for each New Freedom service. While ridership statistics allow FTA to provide a national summary of the NF program, the profiles allow the grantees to convey the benefits of the program at the local level. These qualitative descriptions complement the data collection and provide an additional avenue for understanding the impacts and benefits of both grant programs.

The profiles provide a rich source of detailed information about the New Freedom program and are provided in their entirety under separate cover. For convenience, they are organized in 10 separate documents based on the FTA regions. In addition, relevant excerpts have been incorporated throughout this summary report. As the program profiles made abundantly clear, the NF program connects with riders and customers on a human scale.

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# Introduction

The New Freedom (NF) program provides funding for projects designed to reduce transportation barriers and to expand transportation mobility options available to persons with disabilities beyond the requirements of the Americans with Disabilities Act (ADA) of 1990.

The New Freedom program was established in 2005 as a formula-based program under Section 5317 of the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). The new formula was intended to provide an equitable funding distribution to states and communities as well as a stable and reliable funding source. States and public bodies are eligible designated recipients, and they may distribute grants to subrecipients through a competitive selection process. Eligible subrecipients are private non-profit organizations, state or local governments, and operators of public transportation services including private operators of public transportation services.

New Freedom funds are allocated among large urban, small urban, and non-urbanized/rural areas as follows:

* 60% of funds go to designated recipients in large urban areas with populations 200,000 and more
* 20% of funds go to states for small urban areas under 200,000
* 20% of funds go to states for non-urbanized/rural areas

States may transfer funds between urbanized and non-urbanized area programs.

The New Freedom formula is based on the population of people with disabilities in states and large urbanized areas. SAFETEA-LU authorized approximately of $340 million for NF grants from FY 2006 through FY 2009 (see Table 1-1). In March of this year, Congress extended SAFETEA-LU through December 31, 2010.

Table 1‑1  
FTA New Freedom Funding, 2006 - 2009

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 2006 | 2007 | 2008 | 2009 | Total |
| Apportionments | $77.2M | $81.0M | $87.5M | $92.5M | $338.2M |

## New Freedom Program Performance Evaluation

The FTA contracted with Commonwealth Environmental Services, Inc. (CES, Inc.), and its subcontractor, TranSystems, to manage data collection and analysis for the FY 2009 JARC / New Freedom (NF) Program Performance Evaluation. Individuals from both firms have been key evaluators of the JARC program since 2002 and developed the JARC / NF Program Performance Evaluation system currently being used to evaluate both programs.[[1]](#footnote-1) This volume presents findings for the New Freedom program only. Findings for the JARC program are presented in a separate report.

Under the Government Performance Results Act (GPRA), FTA is required to “establish performance goals to define the level of performance” and to also “establish performance indicators to be used in measuring relevant outputs, service levels, and outcomes” for each of its programs. In addition, FTA is capturing overall program measures to be used with the GPRA and the Performance Assessment Rating Tool process for the U.S. Office of Management and Budget.

Originally, FTA established three key performance indicators for the New Freedom program:

* Increases or enhancements related to geographic coverage, service quality, and/or service times that impact the availability of transportation services for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year
* Additions or changes to environmental infrastructure (e.g., transportation facilities, sidewalks, etc.), technology, and vehicles that impact availability of transportation services as a result of the New Freedom projects implemented in the current reporting year
* Actual or estimated number of rides (as measured by one-way trips) provided for individuals with disabilities as a result of the New Freedom projects implemented in the current reporting year

For the FY 2009 analysis, FTA introduced several additional measures for New Freedom services to capture qualitative data about improvements to demand response, fixed route, flexible, and shuttle services.

For New Freedom **demand response**, recipients were asked to report the following:

* Within the existing ADA paratransit service area, **number of service hours added** for weekday, Saturday, and Sunday/holiday service
* Outside the existing ADA paratransit service area, **number of service hours added** for weekday, Saturday, and Sunday/holiday service

Recipients were asked to report separate totals for weekday, Saturday, and Sunday/holiday service. For all services, respondents were asked to report average hours per day added, not annual hours. This information was collected for service matrix (described below) goals A (expanded geographic coverage), B (extended hours/days of service), and D (improved access/connections).

For New Freedom **fixed route, flexible, and shuttle/feeder services**, recipients were asked to report the following:

* **New miles** added to route (based on one-way route length in miles) for weekday, Saturday, and Sunday/holiday service
* **Percentage increase in miles** (total route length divided by new miles) for weekday, Saturday, and Sunday/holiday service

Recipients were asked to report separate totals for weekday, Saturday, and Sunday/holiday service. If a reported service included more than one route, recipients were asked to sum the route miles and report the total. This information was collected for service matrix (described below) goals A (expanded geographic coverage), B (extended hours/days of service), C (improved system capacity), and D (improved access/connections).

In both cases, the goal was to capture additional quantitative information about service improvements that New Freedom funding made possible.

The majority of New Freedom-funded programs can report one or all of these measures.  However, NF grants also support programs like one-stop centers and wheelchair lifts that provide indirect benefits. To ensure that these programs are represented in the overall analysis, FTA established a protocol for reporting on JARC and, later, New Freedom services. With the assistance of the JARC / NF Advisory Committee, which includes representatives from transit agencies, metropolitan planning organizations, and state DOTs, the consultant team developed a reporting matrix for capturing relevant information about the range of JARC and NF services. The matrix asks grant recipients to categorize their programs based on two criteria: project type and primary project goal.

The reporting matrix includes three basic project types:

* **Trip-based services**, which provide transportation directly to individuals
* **Information-based services**, which provide information about transportation services to individuals but do not provide direct transportation services
* **Capital investment projects**, which include facilities and infrastructure to support transportation services

In keeping with Federal reporting requirements, the five primary program goals are:

* **Expanded geographic coverage**, which includes increasing the coverage area for a service (typically for trip-based or capital investment projects)
* **Extended hours or days of service**, which includes adding hours and/or days to existing services (typically for trip-based or capital investment projects)
* **Improved system capacity**, which includes adding resources that result in additional quantities of service (typically for trip-based or capital investment projects)
* **Improved access or improved connections**, which include projects that improve an individual’s ability to travel (typically trip-based services but also some information-based services such as mobility mangers or capital investment projects such as vehicle loan programs)
* **Improved customer knowledge**, which provides additional resources for information-based services especially customer information and training programs

Based on the combination of service type and primary goal, the cells in the matrix identify the type of service output data to be provided by the reporting grantee. The output measures typically include the number of one-way trips for trip-based programs, the number of customer contacts for information-based services, and the number of units provided for capital investment projects.

“One participant’s family and support staff did not believe that she would be able to overcome the challenge of time-management to meet her regular fixed route on time. However, one year after completing the training, this participant continues to use public transportation to attend her day program that provides her with support for her employment opportunity, to work, and to run personal errands, and to volunteer.”

The ARC of Ventura County

Ventura County Transportation Commission (CA)

In addition to providing the basic reporting elements required for the New Freedom evaluation, grant recipients were asked to complete brief profiles describing each service. The profiles include a description of the service, lessons learned, how the local service is evaluated, and major accomplishments of the program. Recipients were also asked to identify the service area (generally city/county and state). The profile information helps to illustrate the breadth and depth of the projects funded by the NF program and provides particularly useful information about the nature of the information-based and capital investment projects that do not lend themselves to traditional FTA data reporting. Profiles for NF services are presented in an appendix to this report under separate cover. For convenience, they are organized into 10 stand-alone volumes based on the FTA region of the designated recipient.

## Summary of FY 2009 Analysis

A total of 128 grant recipients submitted complete reports for 487 New Freedom-funded services in FY 2009. Key findings include:

* New Freedom-supported services provided 2.4 million one-way trips, an 89% increase over FY 2008
* Out of the active NF-funded services, trip-based projects made up just over half of the funded services (54%). Information-based services made up 28% of projects and capital investment projects, 18%.
* Demand response was the single most funded service, accounting for 24% of all services and providing 424,462 one-way trips (17%)
* Mobility manager contributed the most NF-funded one-way trips, 669,833, or 28% of all trips

This "mainstreaming" of people with disabilities truly addresses the spirit of the ADA. For example, one customer was a life-long ADA Complementary Service user who never rode the fixed route bus system, but after a few hours of training, he transitioned to riding the fixed route system exclusively and discontinued using the ADA Complementary Service. In nine short hours, he gained self- confidence and expanded his travel options.

Clark County Public Transportation Benefit Area (WA)

### Year-to-year comparisons

The current data collection effort, conducted in 2010, covered New Freedom services in operation during Federal FY 2009 (October 1, 2008, through September 30, 2009). When relevant, this analysis will make comparisons with information reported in previous years. When making year-to-year comparisons, it is important to recognize that annual fluctuations in service provision may not necessarily reflect trends in program performance as several factors may influence these annual changes.

It is important to understand that the number of one-way trips generated by NF services is a partial, though important, measure of overall program performance. The New Freedom program is designed to support a broad range of services. These include services that provide transportation directly (such as fixed route, demand response, or user-side subsidies) as well as programs that provide information and investments in capital improvements.

Therefore, year to year changes in the number of one-way trips should be studied carefully in judging program performance. As the mix of services changes from year to year, the number of one-way trips will change accordingly. In the aggregate, it may not be possible to determine whether this kind of change reflects a decline in program performance or simply a new mix of services offered. For example, if the number of capital investment programs increases, the number of one-way trips may well decrease, because improvements such as software systems may not translate directly into trips.

This is why the matrix approach, introduced for FY 2006 (for JARC) and refined for this data cycle, is especially important. The service matrix captures performance information for all New Freedom services and reflects the range of choices made at the local level.

While acknowledging these considerations, the data collected still presents an overall picture of the New Freedom program. Therefore, this analysis:

* Compares the mix of programs from year-to-year, including service type
* Compares the mix of grantees and subrecipients from year to year, including type of operating setting
* Incorporates information from the profiles into the analysis to show the diversity of the New Freedom program, along with lessons learned and elements of success

Table 1-2 illustrates the change in the number of grant recipients reporting in FY 2007 through FY 2009. As the table shows, the number of New Freedom-supported services has increased dramatically year over year.

Table 1‑2  
New Freedom Services Reported by Fiscal Year

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Recipients | | Services | |
| Fiscal Year | **Number** | **Change** | **Number** | **Change** |
| FY 2007 | 21 |  | 60 |  |
| FY 2008 | 43 | 105% | 203 | 238% |
| FY 2009 | 128 | 198% | 487 | 140% |

### Data cleaning and validation

Grant recipients reported initially on 506 New Freedom-supported programs. As a first step in the analysis, the technical team reviewed the records to identify errors, invalid entries, duplicate services, missing data, or other error in data entry.

Common errors and omissions included the following:

* **For all services** - Reporting on service that was not in operation during FY 2009
* **For trip-based services** – Defining demand response services as flexible routes
* **For fixed-route, flexible, and shuttles** – Reporting annual revenue miles instead of route length
* **For service area** – Indicating “county” or “city” instead of entering the name for the county or city served

When the errors had a clear solution (e.g., an obvious typographical error in the state name), the team made the corrections without further research. In other cases, the team contacted recipients and/or subrecipients by telephone or email to clarify questions and to obtain updated information. The final corrected dataset included 128 grant recipients reporting on 487 New Freedom-supported services. This analysis is based on the final validated dataset.

### Data presentation

Most of the tables and charts included in this report present data in percentage terms rather than raw numbers. Because the number of services and one-way trips varies by service type, percentages are a better way to compare programs. In most cases, the percentages are presented in two ways – summed by table row (usually service type) and summed by table column (e.g., size of urbanized area). In general, information in tables is presented in the order used on the data collection forms and in the New Freedom service matrix. The accompanying charts represent the data in the tables, but are sorted by percentage, rather than program type.

## Document Overview

The remainder of this document provides information about the process and results of the New Freedom service evaluation for FY 2009. Chapter 2 summarizes the data collection process; results of the NF evaluation are presented in Chapters 3-6:

* Chapter 3 presents an overview of New Freedom services, including the distribution of service types
* Chapter 4 summarizes ridership on New Freedom services
* Chapter 5 describes the primary goals and outputs of New Freedom-supported programs, as reported by grant recipients
* Chapter 6 highlights key findings of the report

Appendix A summarizes the service matrix approach and Appendix B includes the New Freedom service profiles, which are presented under separate cover as a set of 10 separate documents based on FTA regions.

# Data Collection

Consistent with previous years, New Freedom grantees were asked to use an online form for reporting on FY 2009 New Freedom services. To streamline the data collection process, FTA collected reports for the JARC and NF grant programs at the same time using a single portal. This chapter describes the combined data collection activities for the JARC and NF programs.

The team’s focus during the data collection phase was to bolster the percentage of recipients reporting. For FY 2009, 99% of recipients either reported or indicated they had no reporting obligation (up from 74% in the previous cycle). This was accomplished by:

* Adding a new procedure to verify recipient contacts and reporting requirements in advance of data collection
* Following up repeatedly with non-responding recipients

The team made further changes to the user interface to streamline reporting, particularly for large recipients. Recipients were supported via email, the support website, and by three webinars – up from two in the previous cycle.

This chapter provides additional details on the data collection process.

## Reporting Universe

Similar to prior years, FTA required recipients to report for the FY 2009 reporting cycle if they provided JARC- or New Freedom-funded services at any time between October 1, 2008, and September 30, 2009. Eligibility was based on actual service dates rather than the year the funds were awarded, obligated, or spent.

This year, FTA directed grant recipients not to report on Congressionally designated earmark projects. These services were funded prior to SAFETEA-LU and generally coming to a close. By excluding these projects, FTA could focus the JARC and New Freedom reporting efforts on a consistent universe of designated recipients reporting on programs funded through the formula programs.

### Recipient identification

Through its TEAM system, FTA tracks grant funding status. However, because TEAM is set up to oversee grants rather than services, it does not allow FTA to directly determine which agencies provided JARC- or New Freedom-funded services in any particular period.

To address this challenge, FTA has provided the consultant team with a list of agencies with open JARC or New Freedom grants during reporting year. Consistent with previous years, the team considered this list as a “superset” of the agencies that were required to report and used it as a starting point to locate the grant recipients with active services during the reporting year. The team then contacted each recipient in the superset, first, to determine whether the recipient had a reporting obligation for the fiscal year in question and, if so, to support the recipient through the reporting process. For FY 2009, FTA provided the team with an initial list of 282 reporting candidates.

The team measures reporting performance as the ratio of the number of recipients who have either reported or indicated they had no reporting obligation to the number of recipients in the superset. For FY 2009, this percentage was 99%.

## Recipient Outreach, Tracking, and Follow Up

In past years, it has sometimes been difficult for the project team to reach a responsive contact at an agency. This creates uncertainty about whether a non-responsive agency had services on the street during the reporting year. Agencies may be slow to respond because they know they need not report or because they have other priorities. In a few cases, this has led to agencies discovering that they do have a reporting requirement, close to the end of the reporting period, when it is difficult to gather the needed data and provide it to the reporting system.

To improve contact with recipients and support responsiveness, the team instituted a separate effort to determine reporting obligations in advance of the data collection period. Beginning in mid-February 2010, the team, with FTA assistance, contacted all agencies on the superset list, requesting their response to an online screening survey that would (a) help them to determine whether their agency was required to report for FY 2009, and (b) let them revise their point of contact information.

Ultimately, 95% of the 282 agencies on the superset list provided responses to the survey, either directly, via the web interface, or via phone or email follow-up from a team member. Most of these responses were received, as intended, before the beginning of the reporting period.

The official reporting period began on March 15, 2010, and ended on May 15, 2010. The reporting calendar included the following milestones:

* From the middle of February through the middle of March, the team focused on inviting and reminding recipients in the superset to complete the screening survey
* The reporting site opened to recipients for testing early in March 2010. The site was opened to all recipients and their subrecipients on March 15. General reporting closed on May 15. However, recipients who requested additional time to report were provided access through June 3.
* After May 15, the team worked intensively via email and telephone with recipients who had not yet reported to ensure that they would report. The last submission was received on June 3, and the reporting system was locked to public access on June 4.

### FTA liaison

In conjunction with project staff at FTA headquarters, the evaluation team worked with the FTA regional offices to coordinate communication with the recipients. The team prepared several emails for FTA to send to recipients with information about the reporting schedule and data requirements.

When recipients did not respond to the screening survey or to invitations to report, team members followed up. Initial contact was via email; telephone follow-up was required in about 55 cases. The team was not able to establish contact with 10% of the non-responsive grant recipients and asked FTA to follow up with them, either directly from headquarters or via the appropriate regional office.

### Outreach

The team sent out 1,780 email reminders to specific recipients during the reporting process, to encourage reporting and to ask individual recipients if they needed additional assistance or time to complete their reporting requirements. (See Figure 2-1).

FTA also announced reporting requirements and schedule via the New Freedom and JARC program pages on the FTA website and via its GovDelivery list of JARC and NF contacts.

### Tracking

The team used real-time access to the reporting database, in combination with a flexible reporting capability, to identify candidates for follow-up. These included non-reporters as well as recipients who had provided data but had not completed their submissions. This information was used to generate customized reminders and offers of assistance to select recipients.

### Data responses

As a result of the screening survey, diligent follow-up, and assistance from FTA headquarters, the team was able to improve the overall response rate from 74% in the previous reporting cycle (FY 2007 – FY 2008) to 99% in this reporting cycle. (See Table 2-1).

Table 2‑1  
Reporting Response Rate

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | FY 2009 | | FY 2007 - FY 2008 | |
| Status | **#** | **%** | **#** | **%** |
| Report submitted | 189 | 67% | 158 | 54% |
| Not required to report | 90 | 32% | 59 | 20% |
| Unknown | 3 | 1% | 75 | 26% |
| Total | 282 | 100% | 293 | 100% |

Figure ‑  
Email Outreach

## Technical Assistance

The team provided support to the recipients during the reporting process via a website, webinars, and email and telephone contact.

### Support site

As in previous years, the support effort relied on the FTA JARC & New Freedom Reporting Support Center website (<http://ftajarcnf.cesnn.com/>).

For this reporting cycle, the team substantially reorganized the site, including the graphics and interface. From February 1 through May 31, the support site handled 2,653 visits, consisting of 7,858 page views, from 1,150 visitors, as recorded by Google Analytics. The home page, the page providing webinar information, and the page providing links to sample forms were most popular, accounting for 50% of all page views. Some grantees also submitted questions to the support team via the site’s commenting feature, although most individuals preferred to use email or telephone to request support.

### Webinars

In this reporting cycle, the team continued the practice of enhancing and expanding the effort to support recipients via webinars. Two webinars were scheduled initially, and a third was added to meet demand.

The webinars reached a total of 289 locations, each comprising one or more individuals, presented 37 slides, and handled questions submitted via chat interface and telephone. (See Table 2-2).

Table 2‑2  
Webinar Participation

|  |  |
| --- | --- |
| Date | Web/Phone Connections |
| March 16 | 86 |
| April 7 | 131 |
| April 29 | 72 |

All webinars included participation from FTA staff and the evaluation team. The first two webinars were hosted at FTA headquarters in Washington, D.C., and the third used a backup hosting site.

### Email and telephone contact

Lauren Miller, the team’s lead for technical assistance, responded to 353 email threads from February 1 through June 5. She also assisted recipients and subrecipients via telephone during the reporting process. Evaluation team members Susan Bregman and Rosemary Gerty also provided support to recipients and subrecipients during the reporting period. As part of the quality assurance process described in Chapter 1, Ms. Bregman, the team’s lead for data analysis, contacted about three dozen recipients after the reporting period closed to clarify questions about specific data elements in their service reports.

## Overview of Online Technology and Changes

The data collection system was originally developed for the JARC program in FY 2003 and has been substantially refined in subsequent years. It was modified to include the New Freedom program starting with FY 2007.

### Web infrastructure

The JARC/New Freedom data collection and analysis effort is managed through two public-facing websites and four private websites supporting development and testing.

Recipients and subrecipients enter, review, and submit JARC and New Freedom service information through the data collection website – <http://ftajarcnf-report.cesnn.com>. This site serves as the front-end for the official reporting database, “jnf\_fy09a”. Users also have access to the support website – <http://ftajarcnf.cesnn.com> – as described above.

Behind the scenes, the team maintains four additional websites:

1. The development version of the reporting system
2. The preview version of the reporting system
3. The development blog, used to narrate changes and issues in the team’s websites and databases
4. A formal software version control system, which provides granular tracking and control of code changes and serves as the conduit for code moving from development to preview to production

The development and preview websites are backed by databases separate from the formal reporting database.

### Technical changes

For the FY 2009 reporting cycle, the team made substantial changes in the reporting website to support recipients at large agencies, to streamline the interface, and to provide recipient and subrecipient users with a clear indication of each next step in completing their reporting requirements.

#### Support for large agencies

The team improved the reporting experience for recipients at large agencies in three ways:

1. All recipients who had submitted JARC or New Freedom reports during the FY 2008 reporting cycle had online access to that earlier report
2. Large recipients were able to import the relevant portions of the FY2008 reporting into their FY 2009 forms upon request
3. Subrecipients were provided with an automated capability to notify their recipient when they had completed their reporting

#### Other changes

The user interface was revised to make it easier for users to identify the next step to complete in the reporting process, to select JARC or New Freedom service forms for reporting as appropriate, to focus on the forms for a single subrecipient, and to reduce clutter.

# Overview of New Freedom Services

This chapter reports on the characteristics of New Freedom grantees and their services for FY 2009. Subsequent chapters cover New Freedom performance measures, including one-way trips and outputs for non-trip-based services.

The information is based on data collected from the 128 New Freedom grant recipients that submitted complete and validated reports for FY 2009; these grantees reported on 487 services.

## Service Type

Grantees reported a total of 487 active New Freedom -funded services for FY 2009. Grant recipients were asked to classify services in one of three ways:

* **Trip-based services**, which provide transportation directly to individuals. These include fixed routes, flexible routes, shuttles, demand response, and user-side subsidy programs (e.g., vouchers, ridesharing, and guaranteed ride home).
* **Information-based services**, which provide information about transportation services to individuals but do not provide direct transportation services. These include mobility managers/brokerages, trip or itinerary planning, Internet-based travel information, informational materials, and one-on-one training.
* **Capital investment programs**, including facilities and infrastructure to support transportation services. These include vehicle based programs (such as those making automobiles available to individuals or organizations), facility or amenity improvements, and technology to support transportation services.

Although FTA funds mobility managers as an eligible capital expense, they are categorized here as information-based services for reporting purposes.

Out of the active New Freedom -funded services, the majority were trip-based, making up over half of all services, at approximately 54%. Information-based services also made up a large portion of service, with a 28% share. The remaining 18% of programs were capital investment programs. (See Figure 3-1).

As Table 3-1 and Figure 3-2 show, by far the most commonly reported programs were demand response and mobility managers. Together, these transit services accounted for almost 40% of New Freedom -funded programs. Other assistive services, such as door-to-door or door-through-door service and one-on-one transit training were also funded at a high rate.

Table 3‑1  
New Freedom Services by Type

|  |  |  |
| --- | --- | --- |
| Service Type | # | % |
| Trip-Based Services | **262** | **54%** |
| Fixed route | 27 | 6% |
| Flexible routing | 16 | 3% |
| Shuttle/Feeder | 7 | 1% |
| Demand response | 117 | 24% |
| Same-day ADA paratransit service | 5 | 1% |
| Door-to-door or door-through-door | 38 | 8% |
| Volunteer driver program | 22 | 5% |
| User-side subsidy | 25 | 5% |
| Vanpool service | 1 | 0% |
| Aide/escort assistance | 4 | 1% |
| Information-Based Services | **137** | **28%** |
| Mobility manager | 72 | 15% |
| One-stop center | 8 | 2% |
| Trip/itinerary planning | 3 | 1% |
| One-on-one transit training | 32 | 7% |
| Transportation resource training | 9 | 2% |
| Internet-based information | 2 | 0% |
| Materials and marketing | 11 | 2% |
| Capital Investment Projects | **88** | **18%** |
| Vehicle for transit agency | 28 | 6% |
| Vehicle for other agency | 16 | 3% |
| Accessible taxis | 4 | 1% |
| Vanpool vehicles | 2 | 0% |
| ITS investments | 20 | 4% |
| Elevators | 1 | 0% |
| Large-capacity wheelchair lifts | 2 | 0% |
| Wheelchair securement areas | 1 | 0% |
| Other infrastructure improvements | 14 | 3% |
| Total | **487** | **100%** |



Figure ‑  
New Freedom Services by Type for Three Fiscal Years

The New Freedom program supports a broad array of services tailored to the needs of individual communities. While traditional transit services comprise the majority of NF-funded services, the share of information-based and capital investment programs continues to increase. Between FY 2007 and FY 2009, the number of information-based services provided grew substantially, from 15 to 137.

In FY 2009, demand response and mobility manager made up the largest share of total services provided, accounting for nearly 40% of the total services. Only six other categories of NF-supported services achieved at least a 5% share:

* Fixed route (N=27)
* Door-to-door or door-through-door (N=38)
* Volunteer driver program (N=22)
* User-side subsidy (N=25)
* One-on-one transit training (N=32)
* Vehicle for transit agency (N=28)

Together, these six types of New Freedom services accounted for 76% of the total services. Notably, four of these six services are trip-based.



Figure ‑  
New Freedom Services by Type  
(Program Detail)

## Agency Type

As described earlier, several types of agencies are eligible to receive New Freedom funds. NF **recipients** receive funding from FTA through the Section 5317 formula program. Generally, recipients are state departments of transportation, transit operators, or metropolitan planning organizations. Recipients distribute NF funds to **subrecipients**, typically through a competitive selection process. Eligible subrecipient organizations include state or local governments, public transit operators, or nonprofits. For example, a state department of transportation may distribute NF funds to a rural transit operator for a demand response service or a transit operator may award NF funds to a community-based nonprofit to operate a one-stop center.

Recipients receive funds directly from FTA and subrecipients receive funds indirectly via recipients.

For FY 2009, 128 recipients, or grantees, reported on New Freedom-supported services. As Table 3-2 shows, almost half of reporting recipients were transit agencies. Another 29% were state DOTs and 16% were MPOs; “other” types of agencies made up 8% of those reporting.

Table 3‑2  
Recipients by Agency Type

|  |  |  |
| --- | --- | --- |
| Agency Type | # | % |
| Transit agency | 60 | 47% |
| State DOT | 37 | 29% |
| MPO | 21 | 16% |
| Other | 10 | 8% |
| Total | 128 | 100% |

For FY 2009, 373 separate subrecipients reported New Freedom services. As Table 3-3 indicates, nearly 40% of subrecipients were nonprofits. Public transit operators made up the next largest group (29%), while all other agency types made up 8% or less of subrecipients.

Some subrecipients provided multiple services and a few received funds from multiple recipients. Separate from the FTA definitions, for the purposes of data reporting and analysis, a recipient was also classified as a subrecipient if that recipient agency used New Freedom funds to operate a project itself.

Table 3‑3  
Subrecipients by Agency Type

|  |  |  |
| --- | --- | --- |
| Agency type | # | % |
| Nonprofit | 146 | 39% |
| Public transit operator | 108 | 29% |
| Other | 30 | 8% |
| City DOT | 28 | 8% |
| Other county | 20 | 5% |
| County DOT | 15 | 4% |
| Other city | 12 | 3% |
| Private transit operator | 9 | 2% |
| State agency | 5 | 1% |
| Total | 373 | 100% |

## Size of Urbanized Area

In FY 2009, 42% of New Freedom-supported services were operated in large urbanized areas (population over 200,000), 40% in non-urbanized or rural areas (population less than 50,000), and 18% in small-urban localities (population 50,000-199,000). Note that grantees reported on the size of the service area for each individual program, not for the grantee agency itself. For example, a state DOT that submitted a report for multiple services was asked to characterize the operating setting for each service separately. When a service covered multiple jurisdictions, grantees were asked to select the setting that best characterized the service.

As shown in Figure 3-3, New Freedom-funded services continue to shift toward large urbanized areas, up from 28% in FY 2007, to 42% in FY 2009. Interestingly, the shift in service share seems to be coming from small urbanized areas, rather than from rural areas. Between the three fiscal years, service share in small urban areas dropped from 33% to 18%, while the share in rural areas changed only slightly.

Fixed route and flexible routing services were much more likely to operate in non-urban areas than elsewhere, non-urban services accounting for 56% share in both cases. Demand response (46%), mobility manager (46%), and vehicle for transit agency (57%) were also more likely in non-urban areas. This is not surprising given the goals and target audience of the New Freedom program.

Considering the funding pattern through the three fiscal years, and the service split among areas, the indication is that a few, widely-funded service types (such as demand response and mobility manager) make up a large portion of service in non-urban areas, while numerous, less-frequently used services make up the mix of services offered in urban areas.

Of note is that in five of the nine capital investment project categories, New Freedom funds were used only in large urban areas.



Figure ‑  
New Freedom Services by Size of Urbanized Area for Three Years

(Percentage by Column)

Table 3‑4  
New Freedom Services by Type and Size of Urbanized Area   
(Percentage by Row)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Service Type | # | Large Urban | Small Urban | Non-Urban | Total |
| Trip-Based Services | **262** | **39%** | **17%** | **44%** | **100%** |
| Fixed route | 27 | 26% | 19% | 56% | 100% |
| Flexible routing | 16 | 44% | 0% | 56% | 100% |
| Shuttle/Feeder | 7 | 43% | 29% | 29% | 100% |
| Demand response | 117 | 33% | 21% | 46% | 100% |
| Same-day ADA paratransit service | 5 | 40% | 40% | 20% | 100% |
| Door-to-door or door-through-door | 38 | 45% | 13% | 42% | 100% |
| Volunteer driver program | 22 | 68% | 5% | 27% | 100% |
| User-side subsidy | 25 | 40% | 20% | 40% | 100% |
| Vanpool service | 1 | 0% | 0% | 100% | 100% |
| Aide/escort assistance | 4 | 25% | 25% | 50% | 100% |
| Information-Based Services | **137** | **48%** | **18%** | **34%** | **100%** |
| Mobility manager | 72 | 36% | 18% | 46% | 100% |
| One-stop center | 8 | 88% | 0% | 13% | 100% |
| Trip/itinerary planning | 3 | 67% | 0% | 33% | 100% |
| One-on-one transit training | 32 | 53% | 28% | 19% | 100% |
| Transportation resource training | 9 | 56% | 22% | 22% | 100% |
| Internet-based information | 2 | 0% | 0% | 100% | 100% |
| Materials and marketing | 11 | 82% | 9% | 9% | 100% |
| Capital Investment Projects | **88** | **43%** | **22%** | **35%** | **100%** |
| Vehicle for transit agency | 28 | 18% | 25% | 57% | 100% |
| Vehicle for other agency | 16 | 44% | 13% | 44% | 100% |
| Accessible taxis | 4 | 100% | 0% | 0% | 100% |
| Vanpool vehicles | 2 | 100% | 0% | 0% | 100% |
| ITS investments | 20 | 45% | 20% | 35% | 100% |
| Elevators | 1 | 100% | 0% | 0% | 100% |
| Large-capacity wheelchair lifts | 2 | 100% | 0% | 0% | 100% |
| Wheelchair securement areas | 1 | 100% | 0% | 0% | 100% |
| Other infrastructure improvements | 14 | 50% | 43% | 7% | 100% |
| Total | **487** | **42%** | **18%** | **40%** | **100%** |



Figure ‑  
New Freedom Services by Type and Size of Urbanized Area  
(Percentage by Row)

Table 3‑5  
New Freedom Services by Type and Size of Urbanized Area   
(Percentage by Column)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Service Type | # | Large Urban | Small Urban | Non-Urban | Total |
| Trip-Based Services | **262** | **49%** | **51%** | **60%** | **54%** |
| Fixed route | 27 | 3% | 6% | 8% | 6% |
| Flexible routing | 16 | 3% | 0% | 5% | 3% |
| Shuttle/Feeder | 7 | 1% | 2% | 1% | 1% |
| Demand response | 117 | 19% | 27% | 28% | 24% |
| Same-day ADA paratransit service | 5 | 1% | 2% | 1% | 1% |
| Door-to-door or door-through-door | 38 | 8% | 6% | 8% | 8% |
| Volunteer driver program | 22 | 7% | 1% | 3% | 5% |
| User-side subsidy | 25 | 5% | 6% | 5% | 5% |
| Vanpool service | 1 | 0% | 0% | 1% | 0% |
| Aide/escort assistance | 4 | 0% | 1% | 1% | 1% |
| Information-Based Services | **137** | **32%** | **28%** | **24%** | **28%** |
| Mobility manager | 72 | 13% | 15% | 17% | 15% |
| One-stop center | 8 | 3% | 0% | 1% | 2% |
| Trip/itinerary planning | 3 | 1% | 0% | 1% | 1% |
| One-on-one transit training | 32 | 8% | 10% | 3% | 7% |
| Transportation resource training | 9 | 2% | 2% | 1% | 2% |
| Internet-based information | 2 | 0% | 0% | 1% | 0% |
| Materials and marketing | 11 | 4% | 1% | 1% | 2% |
| Capital Investment Projects | **88** | **19%** | **21%** | **16%** | **18%** |
| Vehicle for transit agency | 28 | 2% | 8% | 8% | 6% |
| Vehicle for other agency | 16 | 3% | 2% | 4% | 3% |
| Accessible taxis | 4 | 2% | 0% | 0% | 1% |
| Vanpool vehicles | 2 | 1% | 0% | 0% | 0% |
| ITS investments | 20 | 4% | 4% | 4% | 4% |
| Elevators | 1 | 0% | 0% | 0% | 0% |
| Large-capacity wheelchair lifts | 2 | 1% | 0% | 0% | 0% |
| Wheelchair securement areas | 1 | 0% | 0% | 0% | 0% |
| Other infrastructure improvements | 14 | 3% | 7% | 1% | 3% |
| Total | **487** | **100%** | **100%** | **100%** | **100%** |



Figure ‑  
New Freedom Services by Type and Size of Urbanized Area   
(Percentage by Column)

## Geographic Coverage

New Freedom recipients were asked to indicate the geographical boundaries of their service area. The greatest share of NF services were provided at the county level (41%), while about 20% of services were provided in both cities/towns or regionally. Services encompassing multiple jurisdictions made up 11%, while only a few programs (8%) served other types of jurisdictions, including neighborhoods. (See Table 3-6 and Figure 3-5).

Key findings included:

* Among trip-based services, demand response, same day ADA paratransit, and aide/escort assistance were overwhelmingly operated at the county level
* Similarly for information-based services, mobility manager, one-on-one transit training, and transportation resource training were much more likely to be county-level services
* ITS investments were funded almost equally at both county and regional levels
* The largest share of other infrastructure improvements occurred at a municipal level
* Many trip-based services were provided in multiple jurisdictions

Looking at jurisdictional differences, demand response, including door-to-door or door-through-door, was the most common service type in municipalities (40%) and for county-level service (33%). Vanpool and aide/escort services, though making up a low overall percentage of services, were operated almost exclusively at the county level. (See Table 3-7 and Figure 3-6).

But knowing that a program served a county only tells part of the story. For example, Cook County (IL), which includes Chicago, offers a very different operating environment than Choctaw County (OK). To examine the geographic distribution of New Freedom services in more detail, the analysis compared jurisdictions and area size.

As Table 3-8 shows, services at all jurisdictional levels are nearly evenly split between large urbanized areas (42% of all services) and non-urbanized areas (40%). Services in small urban areas made up no more than six percent of the services provided at any level.

Table 3‑6  
New Freedom Services by Type and Jurisdiction   
(Percentage by Row)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Service Type | # | County | Municipal | Region | Multiple | Other | Total |
| Trip-Based Services | **262** | **40%** | **26%** | **13%** | **13%** | **8%** | **100%** |
| Fixed route | 27 | 41% | 30% | 11% | 7% | 11% | 100% |
| Flexible routing | 16 | 38% | 25% | 19% | 13% | 6% | 100% |
| Shuttle/Feeder | 7 | 43% | 14% | 0% | 29% | 14% | 100% |
| Demand response | 117 | 42% | 25% | 11% | 12% | 10% | 100% |
| Same-day ADA paratransit service | 5 | 60% | 20% | 0% | 0% | 20% | 100% |
| Door-to-door or door-through-door | 38 | 42% | 32% | 5% | 11% | 11% | 100% |
| Volunteer driver program | 22 | 18% | 36% | 32% | 14% | 0% | 100% |
| User-side subsidy | 25 | 32% | 24% | 20% | 24% | 0% | 100% |
| Vanpool service | 1 | 100% | 0% | 0% | 0% | 0% | 100% |
| Aide/escort assistance | 4 | 75% | 0% | 25% | 0% | 0% | 100% |
| Information-Based Services | **137** | **44%** | **12%** | **28%** | **11%** | **6%** | **100%** |
| Mobility manager | 72 | 43% | 8% | 32% | 11% | 6% | 100% |
| One-stop center | 8 | 50% | 13% | 38% | 0% | 0% | 100% |
| Trip/itinerary planning | 3 | 0% | 67% | 33% | 0% | 0% | 100% |
| One-on-one transit training | 32 | 47% | 16% | 16% | 19% | 3% | 100% |
| Transportation resource training | 9 | 56% | 11% | 22% | 0% | 11% | 100% |
| Internet-based information | 2 | 0% | 0% | 50% | 0% | 50% | 100% |
| Materials and marketing | 11 | 45% | 9% | 27% | 9% | 9% | 100% |
| Capital Investment Projects | **88** | **40%** | **19%** | **25%** | **6%** | **10%** | **100%** |
| Vehicle for transit agency | 28 | 46% | 14% | 25% | 0% | 14% | 100% |
| Vehicle for other agency | 16 | 44% | 19% | 19% | 6% | 13% | 100% |
| Accessible taxis | 4 | 25% | 50% | 25% | 0% | 0% | 100% |
| Vanpool vehicles | 2 | 100% | 0% | 0% | 0% | 0% | 100% |
| ITS investments | 20 | 40% | 5% | 45% | 5% | 5% | 100% |
| Elevators | 1 | 0% | 0% | 100% | 0% | 0% | 100% |
| Large-capacity wheelchair lifts | 2 | 50% | 50% | 0% | 0% | 0% | 100% |
| Wheelchair securement areas | 1 | 100% | 0% | 0% | 0% | 0% | 100% |
| Other infrastructure improvements | 14 | 14% | 43% | 7% | 21% | 14% | 100% |
| Total | **487** | **41%** | **21%** | **19%** | **11%** | **8%** | **100%** |

Figure ‑  
New Freedom Services by Type and Jurisdiction   
(Percentage by Row)

Table 3‑7

New Freedom Services by Type and Jurisdiction   
(Percentage by Column)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Service Type | # | County | Municipal | Region | Multiple | Other | Total |
| Trip-Based Services | **262** | **52%** | **68%** | **36%** | **62%** | **56%** | **54%** |
| Fixed route | 27 | 6% | 8% | 3% | 4% | 8% | 6% |
| Flexible routing | 16 | 3% | 4% | 3% | 4% | 3% | 3% |
| Shuttle/Feeder | 7 | 2% | 1% | 0% | 4% | 3% | 1% |
| Demand response | 117 | 25% | 28% | 14% | 26% | 31% | 24% |
| Same-day ADA paratransit service | 5 | 2% | 1% | 0% | 0% | 3% | 1% |
| Door-to-door or door-through-door | 38 | 8% | 12% | 2% | 8% | 10% | 8% |
| Volunteer driver program | 22 | 2% | 8% | 7% | 6% | 0% | 5% |
| User-side subsidy | 25 | 4% | 6% | 5% | 11% | 0% | 5% |
| Vanpool service | 1 | 1% | 0% | 0% | 0% | 0% | 0% |
| Aide/escort assistance | 4 | 2% | 0% | 1% | 0% | 0% | 1% |
| Information-Based Services | **137** | **30%** | **16%** | **40%** | **28%** | **21%** | **28%** |
| Mobility manager | 72 | 16% | 6% | 24% | 15% | 10% | 15% |
| One-stop center | 8 | 2% | 1% | 3% | 0% | 0% | 2% |
| Trip/itinerary planning | 3 | 0% | 2% | 1% | 0% | 0% | 1% |
| One-on-one transit training | 32 | 8% | 5% | 5% | 11% | 3% | 7% |
| Transportation resource training | 9 | 3% | 1% | 2% | 0% | 3% | 2% |
| Internet-based information | 2 | 0% | 0% | 1% | 0% | 3% | 0% |
| Materials and marketing | 11 | 3% | 1% | 3% | 2% | 3% | 2% |
| Capital Investment Projects | **88** | **18%** | **17%** | **23%** | **9%** | **23%** | **18%** |
| Vehicle for transit agency | 28 | 7% | 4% | 7% | 0% | 10% | 6% |
| Vehicle for other agency | 16 | 4% | 3% | 3% | 2% | 5% | 3% |
| Accessible taxis | 4 | 1% | 2% | 1% | 0% | 0% | 1% |
| Vanpool vehicles | 2 | 1% | 0% | 0% | 0% | 0% | 0% |
| ITS investments | 20 | 4% | 1% | 10% | 2% | 3% | 4% |
| Elevators | 1 | 0% | 0% | 1% | 0% | 0% | 0% |
| Large-capacity wheelchair lifts | 2 | 1% | 1% | 0% | 0% | 0% | 0% |
| Wheelchair securement areas | 1 | 1% | 0% | 0% | 0% | 0% | 0% |
| Other infrastructure improvements | 14 | 1% | 6% | 1% | 6% | 5% | 3% |
| Total | **487** | **100%** | **100%** | **100%** | **100%** | **100%** | **100%** |



Figure ‑  
New Freedom Services by Type and Jurisdiction  
(Percentage by Column)

Table 3‑8  
New Freedom Services by Jurisdiction and Size of Urbanized Area

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Service Type | Large Urban | Small Urban | Non-Urban | Total |
| County | 17% | 6% | 18% | 41% |
| Municipal | 10% | 6% | 6% | 21% |
| Regional | 7% | 3% | 9% | 19% |
| Multiple | 4% | 2% | 4% | 11% |
| Other | 4% | 1% | 2% | 8% |
| Total | **42%** | **18%** | **40%** | **100%** |

# One-Way Trips

As in previous years, New Freedom grant recipients were asked to report annual one-way trips. Almost all grantees with trip-based services were able to provide this information (91%). In addition, some grantees with information-based services or capital-investment programs reported on one-way trips as well, including mobility managers and agencies that acquired vehicles for passenger service (16%). Trips reported were generally those that were taken as a result of the information or assistance provided by the mobility manager, or those provided on an additional vehicle purchased with New Freedom funds, etc.

For FY 2009, it is estimated that New Freedom-supported services provided 2.4 million one-way trips, an 89% increase over FY 2008

Considering purely trip-based services, most one-way trips were recorded on demand response services, including door-to-door or door-through-door assistance (27%), followed closely by fixed route services (13%). No other trip-based service accounted for more than seven percent of total one-way, New Freedom-funded trips in FY 2009. Important to note, however, is that mobility manager, under information-based services, actually recorded more one-way trips that any other service, overall, with almost 700,000 trips, or 28% of total NF-funded trips. This would indicate that, while not directly providing service, mobility managers facilitated a very large number of NF trips during FY 2009. Table 4-1 and Figure 4-1 show this distribution.

Through the infusion of JARC/New Freedom funding, Allegany County has been able to build a strong infrastructure that will result in true system change that will have sustaining impact on the community as a whole. JARC/New Freedom, while focused on specific populations, is in essence the catalyst that creates system change. This funding has enabled us to build trust, improve coordination, leverage resources, and develop a sustainable transportation system that results in positive impact to the community overall.

Allegany/Western Steuben Rural Health Network, Inc. (PA)

Allegany/Western Steuben Rural Health Network, Inc.

Allegany/Western Steuben Rural Health Network, Inc.

When a type of service was assumed not to generate trips (such as marketing materials or itinerary planning), grant recipients were not asked to report trips. In addition, some recipients used New Freedom funds to purchase one or more vehicles that they placed into service. In these cases, to avoid double counting, trips were attributed to the service (e.g., fixed route or demand response) and not to the capital investment.

Table 4‑1  
One-Way Trips by New Freedom Service Type

|  |  |  |  |
| --- | --- | --- | --- |
|  | Services | One-Way Trips | |
| Service Type | **#** | **#** | **%** |
| Trip-Based Services | **262** | **1,442,703** | **59%** |
| Fixed route | 27 | 306,241 | 13% |
| Flexible routing | 16 | 112,744 | 5% |
| Shuttle/Feeder | 7 | 6,783 | 0% |
| Demand response | 117 | 424,462 | 17% |
| Same-day ADA paratransit service | 5 | 9,823 | 0% |
| Door-to-door or door-through-door | 38 | 245,338 | 10% |
| Volunteer driver program | 22 | 182,103 | 7% |
| User-side subsidy | 25 | 130,122 | 5% |
| Vanpool service | 1 | 1,484 | 0% |
| Aide/escort assistance | 4 | 23,603 | 1% |
| Information-Based Services | **137** | **669,833** | **28%** |
| Mobility manager | 72 | 669,833 | 28% |
| One-stop center | 8 | N/A | 0% |
| Trip/itinerary planning | 3 | N/A | 0% |
| One-on-one transit training | 32 | N/A | 0% |
| Transportation resource training | 9 | N/A | 0% |
| Internet-based information | 2 | N/A | 0% |
| Materials and marketing | 11 | N/A | 0% |
| Capital Investment Projects | **88** | **316,363** | **13%** |
| Vehicle for transit agency | 28 | 45,178 | 2% |
| Vehicle for other agency | 16 | 10,454 | 0% |
| Accessible taxis | 4 | 10,189 | 0% |
| Vanpool vehicles | 2 | 0 | 0% |
| ITS investments | 20 | 250,542 | 10% |
| Elevators | 1 | N/A | 0% |
| Large-capacity wheelchair lifts | 2 | N/A | 0% |
| Wheelchair securement areas | 1 | N/A | 0% |
| Other infrastructure improvements | 14 | N/A | 0% |
| Total | **487** | **2,428,899** | **100%** |



Figure ‑  
One-Way Trips by New Freedom Service Type   
(Thousands of Trips)

## Size of Urbanized Area

Clear differences were apparent among geographic settings. For one-way trips on fixed route services, more than three out of four (79%) were reported in large urbanized areas, 5% in small urban areas, and 16% in rural communities. Demand response shows a very different pattern: Close to half (45%) were in rural areas, and the rest of the trips were split between large urbanized (33%) and small urban (23%) areas. Information-based services, which generated trips for mobility manager programs only, were heavily skewed toward large urban areas (63% of one-way trips). See Table 4-2 and Figure 4-2.

We were able to train and transition individuals with disabilities who had never ridden a city bus and [were] fully dependent on PossAbilities for their transportation to and from work, to fully independent individuals using the city bus for that same commute. Their personal transformation as they gained the skills and confidence in using the city bus and became independent riders was amazing and inspiring to watch.

PossAbilites of Southern Minnesota (MN)

In large urban areas, mobility managers generated the most one-way trips (32%), while trip-based services such as fixed route and demand response accounted for 18% and 11% each, respectively. Similarly, in small urban areas, mobility managers recorded 51% of one-way trips, demand response 24%, and fixed route only 4%. This is not surprising given that urban areas are likely to have more transit options than smaller areas, allowing a mobility manager to offer various trip options. In rural areas, mobility managers made up on 6% of one-way trips while demand response and door-to-door or door-through-door service together made up over half of all one-way trips for FY 2009 (52%). Additionally, flexible routing accounted for 11% of trips and user-side subsidies/ vouchers, 10%; in no other area did either service account for more than nine percent of total trips and, in most cases, no more than four percent. (See Table 4-3 and Figure 4-3).

Table 4‑2  
One-Way Trips by Service Type and Size of Urbanized Area   
(Percentage by Row)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Service Type | # | Large Urban | Small Urban | Non-Urban | Total |
| Trip-Based Services | **1,442,703** | **44%** | **13%** | **44%** | **100%** |
| Fixed route | 306,241 | 79% | 5% | 16% | 100% |
| Flexible routing | 112,744 | 31% | 0% | 69% | 100% |
| Shuttle/Feeder | 6,783 | 39% | 49% | 13% | 100% |
| Demand response | 424,462 | 33% | 23% | 45% | 100% |
| Same-day ADA paratransit service | 9,823 | 16% | 68% | 16% | 100% |
| Door-to-door or door-through-door | 245,338 | 22% | 6% | 72% | 100% |
| Volunteer driver program | 182,103 | 68% | 1% | 31% | 100% |
| User-side subsidy | 130,122 | 19% | 27% | 54% | 100% |
| Vanpool service | 1,484 | 0% | 0% | 100% | 100% |
| Aide/escort assistance | 23,603 | 29% | 48% | 23% | 100% |
| Information-Based Services | **669,833** | **63%** | **31%** | **6%** | **100%** |
| Mobility manager | 669,833 | 63% | 31% | 6% | 100% |
| One-stop center |  | 0% | 0% | 0% | 0% |
| Trip/itinerary planning |  | 0% | 0% | 0% | 0% |
| One-on-one transit training |  | 0% | 0% | 0% | 0% |
| Transportation resource training |  | 0% | 0% | 0% | 0% |
| Internet-based information |  | 0% | 0% | 0% | 0% |
| Materials and marketing |  | 0% | 0% | 0% | 0% |
| Capital Investment Projects | **316,363** | **84%** | **4%** | **12%** | **100%** |
| Vehicle for transit agency | 45,178 | 5% | 28% | 67% | 100% |
| Vehicle for other agency | 10,454 | 17% | 1% | 81% | 100% |
| Accessible taxis | 10,189 | 100% | 0% | 0% | 100% |
| Vanpool vehicles | 0 | 0% | 0% | 0% | 0% |
| ITS investments | 250,542 | 100% | 0% | 0% | 100% |
| Elevators |  | 0% | 0% | 0% | 0% |
| Large-capacity wheelchair lifts |  | 0% | 0% | 0% | 0% |
| Wheelchair securement areas |  | 0% | 0% | 0% | 0% |
| Other infrastructure improvements |  | 0% | 0% | 0% | 0% |
| Total | **2,428,899** | **54%** | **17%** | **29%** | **100%** |



Figure ‑  
One-Way Trips by New Freedom Service Type and Size of Urbanized Area   
(Percentage by Row)

Table 4‑3  
One-Way Trips by Service Type and Size of Urbanized Area   
(Percentage by Column)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Service Type | # | Large Urban | Small Urban | Non-Urban | Total |
| Trip-Based Services | **1,442,703** | **48%** | **45%** | **89%** | **59%** |
| Fixed route | 306,241 | 18% | 4% | 7% | 13% |
| Flexible routing | 112,744 | 3% | 0% | 11% | 5% |
| Shuttle/Feeder | 6,783 | 0% | 1% | 0% | 0% |
| Demand response | 424,462 | 11% | 24% | 27% | 17% |
| Same-day ADA paratransit service | 9,823 | 0% | 2% | 0% | 0% |
| Door-to-door or door-through-door | 245,338 | 4% | 4% | 25% | 10% |
| Volunteer driver program | 182,103 | 9% | 1% | 8% | 7% |
| User-side subsidy | 130,122 | 2% | 9% | 10% | 5% |
| Vanpool service | 1,484 | 0% | 0% | 0% | 0% |
| Aide/escort assistance | 23,603 | 1% | 3% | 1% | 1% |
| Information-Based Services | **669,833** | **32%** | **51%** | **6%** | **28%** |
| Mobility manager | 669,833 | 32% | 51% | 6% | 28% |
| One-stop center |  | 0% | 0% | 0% | 0% |
| Trip/itinerary planning |  | 0% | 0% | 0% | 0% |
| One-on-one transit training |  | 0% | 0% | 0% | 0% |
| Transportation resource training |  | 0% | 0% | 0% | 0% |
| Internet-based information |  | 0% | 0% | 0% | 0% |
| Materials and marketing |  | 0% | 0% | 0% | 0% |
| Capital Investment Projects | **316,363** | **20%** | **3%** | **5%** | **13%** |
| Vehicle for transit agency | 45,178 | 0% | 3% | 4% | 2% |
| Vehicle for other agency | 10,454 | 0% | 0% | 1% | 0% |
| Accessible taxis | 10,189 | 1% | 0% | 0% | 0% |
| Vanpool vehicles | 0 | 0% | 0% | 0% | 0% |
| ITS investments | 250,542 | 19% | 0% | 0% | 10% |
| Elevators |  | 0% | 0% | 0% | 0% |
| Large-capacity wheelchair lifts |  | 0% | 0% | 0% | 0% |
| Wheelchair securement areas |  | 0% | 0% | 0% | 0% |
| Other infrastructure improvements |  | 0% | 0% | 0% | 0% |
| Total | **2,428,899** | **100%** | **100%** | **100%** | **100%** |

Figure ‑  
One-Way Trips by New Freedom Service Type and Size of Urbanized Area   
(Percentage by Column)



## Compare Trips and Services

The analysis compared the number of trips by service type with the number of programs. As shown in Table 4-4 and Figure 4-4, the trends that emerge are not surprising, given the goals of the program. Specifically:

* Mobility managers make up only 15% of total services, but account for 28% of one-way trips
* Fixed routes accounted for 6% of the New Freedom services, but 13% of all one-way trips

New Freedom funding has made it possible for individuals with disabilities, who would otherwise have been unemployed, to earn more than $8,000 during this reporting period. These individuals benefit not only from earning a paycheck, but also from the training and services provided by Mount Rogers.

Mount Rogers Community Services Board (VA)

Virginia Department of Rail and Public Transportation

* With 24% of the reported NF services, much more than any other service type, demand response generated 17% of the trips

This pattern likely reflects several factors. First, as indicated above, the goals of the New Freedom program may be more conducive to services other than traditional, fixed route services. Second, fixed routes are more likely to use larger vehicles than other types of New Freedom-supported services and to traverse more densely developed corridors. Demand response services tend to use vans and mini-buses, which carry fewer passengers than full-size buses, and they are more likely to operate in low-density rural communities. In addition, for purposes of this analysis, when a grant recipient used NF funds to purchase a vehicle and place that vehicle in service, the resulting trips were assigned to the service rather than to the capital investment. Therefore, this further reduced the number of trips reported for capital projects in this analysis.

Table 4‑4  
Comparison of New Freedom Services and One-Way Trips   
(Percentage by Column)

|  |  |  |
| --- | --- | --- |
| Service Type | Services | One-Way Trips |
| Trip-Based Services | **54%** | **59%** |
| Fixed route | 6% | 13% |
| Flexible routing | 3% | 5% |
| Shuttle/Feeder | 1% | 0% |
| Demand response | 24% | 17% |
| Same-day ADA paratransit service | 1% | 0% |
| Door-to-door or door-through-door | 8% | 10% |
| Volunteer driver program | 5% | 7% |
| User-side subsidy | 5% | 5% |
| Vanpool service | 0% | 0% |
| Aide/escort assistance | 1% | 1% |
| Information-Based Services | **28%** | **28%** |
| Mobility manager | 15% | 28% |
| One-stop center | 2% | 0% |
| Trip/itinerary planning | 1% | 0% |
| One-on-one transit training | 7% | 0% |
| Transportation resource training | 2% | 0% |
| Internet-based information | 0% | 0% |
| Materials and marketing | 2% | 0% |
| Capital Investment Projects | **18%** | **13%** |
| Vehicle for transit agency | 6% | 2% |
| Vehicle for other agency | 3% | 0% |
| Accessible taxis | 1% | 0% |
| Vanpool vehicles | 0% | 0% |
| ITS investments | 4% | 10% |
| Elevators | 0% | 0% |
| Large-capacity wheelchair lifts | 0% | 0% |
| Wheelchair securement areas | 0% | 0% |
| Other infrastructure improvements | 3% | 0% |
| Total | **100%** | **100%** |



Figure ‑  
Comparison of New Freedom Services and One-Way Trips   
(Percentage by Column)

# Primary Goals

As described in Chapter 1, the New Freedom service matrix was developed to categorize and summarize New Freedom-funded services based on service type and primary goal. The matrix allows FTA to extend its analysis beyond one-way trips by also capturing program performance outputs from non-traditional services.

## Program Goals

Recipients were asked to indicate the primary goal for each New Freedom-supported service. Although many programs have multiple goals, for the purposes of this analysis, recipients were asked to select only one goal. The five goals are:

Using New Freedom funded transportation is a powerful stepping stone to self-initiated use of other available transit and fosters effort at returning to or achieving better stability and independence.

Lake County Council on Aging Community Transit (MT)

Montana Department of Transportation

* Expanded geographic coverage
* Extended service hours or days
* Improved system capacity
* Improved access/connections
* Improved customer knowledge

When developing the matrix, FTA made certain assumptions about the relationship between service types and project goals, and not every combination was considered reasonable. For example, grantees reporting on mobility manager programs were only allowed to select *improved access / connections* as a goal; the other choices were not available. Cells that were not available for data entry are grayed out on the matrix tables in this chapter. The following three tables show New Freedom-supported services in relation to the five goals. Table 5-1 shows number of services, Table 5-2 shows the percentage of service by type, and Table 5-3 shows the percentage by goal.

Figure 5-1 illustrates the shifting program goals among the three years of New Freedom analysis. While both improved *system capacity* and *extended service hours or days* were designated at about the same rate between the three years, the mix of improved *access/connections* and *expanded geographic coverage* has changed. As the share of *expanded geographic coverage* has consistently decreased, the inverse occurred for improved *access/connections*, a significant increase, and then a very small decrease. This pattern could indicate that grantees feel that have maximized their ability to expand geographically, and now seek to extend services through better access and connections to other services.

For FY 2009, the most commonly selected goal was, improved *access/connections* (49%), while *expanded geographic coverage* was indicated 17% of the time. No other goal was designated more than 15% of the time. The other goals were chosen as follows *improved customer* knowledge (14%), *extended service hours or days* (11%), and improved *system capacity* (9%). Other major findings include:

* Mobility manager made up the largest share of programs providing *improved access/connections* (30%). Otherwise, only demand response and door-to-door or door-through-door service made up more than a 10% share (15% and 16%, respectively).
* About 52% of services with a primary goal of *expanded geographic coverage* were demand response, 20% were fixed route, and 9% were vehicle for transit agency
* Nearly all of the *extended service hours or days* were demand response (75%); only five (of 19) other services reported this as their goal and no other service had more than 8% share
* Vehicle for agency was the most commonly reported program in the capital investment category, and 59% reported a primary goal of *improved system capacity*
* Nearly all of the programs with a primary goal of *improved customer knowledge* were defined as information-based services; One-on-one transit training made up the majority (48%) of these services
* Fixed route and shuttle/feeder services were more likely to provide *expanded geographic coverage* than *extended service hours or days*
* Demand response programs were distributed across three goals: *expanded geographic coverage* (52%), *extended service hours or days* (75%), and *improved access/connections* (15%)

Figure ‑   
New Freedom Goals Identified through Three Fiscal Years   
(Percentage by Column)



## Program Outputs

The New Freedom service matrix was designed to enable FTA to capture information about the range of benefits that NF-funded services provide – benefits that extend beyond the traditional measure of one-way trips. Grant recipients were asked to report on the outputs of their NF-funded services. These measures were developed by FTA, in consultation with the Project Advisory Committee, and included the following:

* **One-way trips** – All trip-based services were asked to report one-way trips, as well as programs like mobility manager and vehicle purchase programs that generated trips
* **New miles added** – All trip-based services were asked to report the number and percentage of new, one-way miles added to weekday, Saturday, or Sunday/holiday route
* **Additional service hours** – Demand response services were asked to report number of new hours added to weekday, Saturday, or Sunday/holiday service both within the existing ADA paratransit service area and beyond the existing ADA paratransit service area
* **Customer contacts** – Mobility managers, along with other information-based programs that worked with individuals on a one-on-one basis, reported customer contacts
* **Customers served** – This measure applied to web-based programs and was designed to reflect site visitors or similar analytic measures of Internet activity
* **People trained** – Programs that provide training, either to individuals or to groups, were asked to estimate the number of individuals who received training
* **Materials distributed** – Programs that developed marketing brochures or similar products were asked to provide a brief description of their materials
* **Vehicles added** – This measure applied to programs that acquired vehicles for agencies or individuals

For programs that were less easy to categorize, like ITS-related hardware or software improvements, recipients provided a brief description of the program or investment.

As previously indicated, some reporting measures were newly implemented in FY 2009, including number of service hours added for demand response service, and new miles added for fixed route, shuttle/feeder, and flexible service. Because some recipients may not have known they would be required to report this, those recipients that already had access to the data may or may not have reported it, while others may have just skipped over the question. Data in these categories should be interpreted carefully, as recipients may have used “n/a” to indicate “don’t have this data,” rather than “zero miles/hours added.”

Also for FY 2009, several grantees reported on feasibility studies or similar projects where the outcome was a report, rather than a service. When these programs were deemed separate from the required coordinated planning process, they were included under “Materials and Marketing.” The evaluation team selected this category as a temporary solution and will consider adding a new service category for FY 2010 reporting.

Table 5-4 shows the distribution of program outputs by service type and primary goals. Highlights are presented in the following sections.

### Trip-based services

New Freedom-supported trip-based services generated 1.4 million one-way trips in FY 2009.

* One-way trips on demand responsive service were provided much more than any other service and were most likely to be associated with programs providing *expanded geographic coverage* (227,195) and *improved access / connections* (120,420)
* Fixed route services provided a total of 306,241 trips, the large majority of which reported a goal of *extended service hours or days*, although trip generation was distributed among all allowable goals
* Flexible routes were most likely to provide *improved system capacity*
* Same-day ADA paratransit service, door-to-door or door-through-door, volunteer driver program, user-side subsidies, and aide/escort assistance generated nearly 600,000 trips under the *improved access / connections* category
* Programs providing *expanded geographic coverage* added 7,107 new service miles, 157 additional hours of service within current ADA service areas, and 247 additional hours of service outside the ADA-mandated service area
* Programs with a reported goal of *extended service hours or days* added more than 7,500 new miles of service and 775 additional hours of service

### Information-based services

This category included a broad mix of programs, from mobility managers to Internet-based information. Some of the major findings:

* Mobility managers generated nearly 670,000 one-way trips and initiated over 260,000 customer contacts
* Internet-based information served 54,180 customers
* One-stop centers reported almost 30,000 customer contacts.
* More than 7,500 people received one-on-one transit training and about 2,200 took part in group travel resource training

### Capital investment programs

This category included programs providing transit vehicles for agencies (transit and other), vehicles for vanpool programs, accessible taxis, ITS investments, elevators, and wheelchair lift and securement improvements. Highlights included:

* Agencies added 86 vehicles and generated more than 55,000 one-way trips. A large majority of the vehicles were added in programs designed to *improve system capacity*.
* 40 accessible taxis were purchased, accounting for approximately 10,000 one-way trips
* ITS-related improvements included GPS units, mobile data terminals, and general communications upgrades accounted for over 250,000 trips
* Three wheelchair lifts and 26 wheelchair securement areas were added

Grant recipients that used New Freedom funding to purchase agency vehicles had two options for reporting one-way trips. Some categorized the trip information as part of the capital project; others reported the service component separately, for example as a demand-response or fixed route service. Accordingly, the trip numbers associated with capital vehicle purchases understate the impacts of those investments.

Table 5‑1  
New Freedom Service Matrix – Distribution of Services by Primary Goal   
(Number of services)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based | **67** | **46** | **6** | **143** | **0** |
| 1. Fixed route | 16 | 3 | 3 | 5 |  |
| 1. Flexible routing | 6 | 4 | 2 | 4 |  |
| 1. Shuttle/Feeders | 2 |  |  | 5 |  |
| 1. Demand response | 43 | 39 |  | 35 |  |
| 1. Same-day ADA paratransit |  |  |  | 5 |  |
| 1. Door-to-door or door-through-door |  |  |  | 38 |  |
| 1. Volunteer driver |  |  |  | 22 |  |
| 1. User-side subsidy |  |  |  | 25 |  |
| 1. Vanpool service |  |  | 1 | 0 |  |
| 1. Aide/escort assistance |  |  |  | 4 |  |
| II. Information-Based | **0** | **0** | **0** | **72** | **65** |
| 1. Mobility manager |  |  |  | 72 |  |
| 1. One-stop center |  |  |  |  | 8 |
| 1. Itinerary planning |  |  |  |  | 3 |
| 1. One-on-one transit training |  |  |  |  | 32 |
| 1. Transportation resource training |  |  |  |  | 9 |
| 1. Internet-based info |  |  |  |  | 2 |
| 1. Materials and marketing |  |  |  |  | 11 |
| III. Capital Investment | **15** | **6** | **40** | **25** | **2** |
| 1. Vehicle for transit agency | 7 | 3 | 18 |  |  |
| 1. Vehicle for other agency | 6 | 1 | 9 |  |  |
| 1. Accessible taxis | 1 | 2 | 1 |  |  |
| 1. Vanpool vehicles |  |  | 1 | 1 |  |
| 1. ITS investments |  |  | 11 | 8 | 1 |
| 1. Elevators |  |  |  | 1 |  |
| 1. Large-capacity lifts |  |  |  | 2 |  |
| 1. Wheelchair-securement areas |  |  |  | 1 |  |
| 1. Other capital projects | 1 | 0 | 0 | 12 | 1 |
| Total | **82** | **52** | **46** | **240** | **67** |

Table ‑2  
New Freedom Service Matrix – Distribution of Services by Primary Goal   
(Percentage by row)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based | **26%** | **18%** | **2%** | **55%** | **0%** |
| 1. Fixed route | 59% | 11% | 11% | 19% |  |
| 1. Flexible routing | 38% | 25% | 13% | 25% |  |
| 1. Shuttle/Feeders | 29% | 0% |  | 71% |  |
| 1. Demand response | 37% | 33% |  | 30% |  |
| 1. Same-day ADA paratransit |  |  |  | 100% |  |
| 1. Door-to-door or door-through-door |  |  |  | 100% |  |
| 1. Volunteer driver |  |  |  | 100% |  |
| 1. User-side subsidy |  |  |  | 100% |  |
| 1. Vanpool service |  |  | 100% | 0% |  |
| 1. Aide/escort assistance |  |  |  | 100% |  |
| II. Information-Based | **0%** | **0%** | **0%** | **53%** | **47%** |
| 1. Mobility manager |  |  |  | 100% |  |
| 1. One-stop center |  |  |  |  | 100% |
| 1. Itinerary planning |  |  |  |  | 100% |
| 1. One-on-one transit training |  |  |  |  | 100% |
| 1. Transportation resource training |  |  |  |  | 100% |
| 1. Internet-based info |  |  |  |  | 100% |
| 1. Materials and marketing |  |  |  |  | 100% |
| III. Capital Investment | **17%** | **7%** | **45%** | **28%** | **2%** |
| 1. Vehicle for transit agency | 25% | 11% | 64% |  |  |
| 1. Vehicle for other agency | 38% | 6% | 56% |  |  |
| 1. Accessible taxis | 25% | 50% | 25% |  |  |
| 1. Vanpool vehicles |  |  | 50% | 50% |  |
| 1. ITS investments |  |  | 55% | 40% | 5% |
| 1. Elevators |  |  |  | 100% |  |
| 1. Large-capacity lifts |  |  |  | 100% |  |
| 1. Wheelchair-securement areas |  |  |  | 100% |  |
| 1. Other capital projects | 7% | 0% | 0% | 86% | 7% |
| Total | **17%** | **11%** | **9%** | **49%** | **14%** |

Table ‑3  
New Freedom Service Matrix – Distribution of Services by Primary Goal   
(Percentage by column)

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based | **82%** | **88%** | **13%** | **60%** | **0%** |
| 1. Fixed route | 20% | 6% | 7% | 2% |  |
| 1. Flexible routing | 7% | 8% | 4% | 2% |  |
| 1. Shuttle/Feeders | 2% | 0% |  | 2% |  |
| 1. Demand response | 52% | 75% |  | 15% |  |
| 1. Same-day ADA paratransit |  |  |  | 2% |  |
| 1. Door-to-door or door-through-door |  |  |  | 16% |  |
| 1. Volunteer driver |  |  |  | 9% |  |
| 1. User-side subsidy |  |  |  | 10% |  |
| 1. Vanpool service |  |  | 2% | 0% |  |
| 1. Aide/escort assistance |  |  |  | 2% |  |
| II. Information-Based | **0%** | **0%** | **0%** | **30%** | **97%** |
| 1. Mobility manager |  |  |  | 30% |  |
| 1. One-stop center |  |  |  |  | 12% |
| 1. Itinerary planning |  |  |  |  | 4% |
| 1. One-on-one transit training |  |  |  |  | 48% |
| 1. Transportation resource training |  |  |  |  | 13% |
| 1. Internet-based info |  |  |  |  | 3% |
| 1. Materials and marketing |  |  |  |  | 16% |
| III. Capital Investment | **18%** | **12%** | **87%** | **10%** | **3%** |
| 1. Vehicle for transit agency | 9% | 6% | 39% |  |  |
| 1. Vehicle for other agency | 7% | 2% | 20% |  |  |
| 1. Accessible taxis | 1% | 4% | 2% |  |  |
| 1. Vanpool vehicles |  |  | 2% | 0% |  |
| 1. ITS investments |  |  | 24% | 3% | 1% |
| 1. Elevators |  |  |  | 0% |  |
| 1. Large-capacity lifts |  |  |  | 1% |  |
| 1. Wheelchair-securement areas |  |  |  | 0% |  |
| 1. Other capital projects | 1% | 0% | 0% | 5% | 1% |
| Total | **100%** | **100%** | **100%** | **100%** | **100%** |

Table ‑  
New Freedom Service Matrix – Service Outputs by Primary Goal

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based |  |  |  |  |  |
| 1. Fixed route | 77,952 one-way trips  Miles added  6,544 weekday 268 Sunday | 167,761 one-way trips  Miles added  7,364 weekday  109 Sunday | 13,877 one-way trips  Miles added  603 weekday | 46,651 one-way trips  Miles added  369 weekday |  |
| 1. Flexible routing | 10,793 one-way trips  Miles added  175 weekday | 14,529 one-way trips  Miles added  45 weekday | 66,750 one-way trips  Miles added  667 weekday  311 Sunday | 20,672 one-way trips  Miles added  101 weekday |  |
| 1. Shuttle/Feeders | 849 one-way trips  Miles added  120 weekday | 0 |  | 5,934 one-way trips  Miles added  173 weekday  110 Sunday |  |
| 1. Demand response | 227,195 one-way trips  Hours added within service area  87.5 weekday  47 Saturday  22 Sunday  Hours added beyond service area  155 weekday  53 Saturday  39 Sunday | 76,847 one-way trips  Hours added within service area  200 weekday  131 Saturday  64 Sunday  Hours added beyond service area  199 weekday  110 Saturday  71 Sunday |  | 120,420 one-way trips  Hours added within service area  101 weekday  44 Saturday  40 Sunday  Hours added beyond service area  93 weekday  31 Saturday  40 Sunday |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based |  |  |  |  |  |
| 1. Same-day ADA paratransit |  |  |  | 9,823 one-way trips |  |
| 1. Door-to-door or door-through-door |  |  |  | 245,338 one-way trips |  |
| 1. Volunteer driver |  |  |  | 182,103 one-way trips |  |
| 1. User-side subsidy |  |  |  | 130,122 trips |  |
| 1. Vanpool service |  |  | 1,484 one-way trips |  |  |
| 1. Aide/escort assistance |  |  |  | 23,603 one-way trips |  |
| II. Information-Based |  |  |  |  |  |
| 1. Mobility manager |  |  |  | 669,833 one-way trips  261,497 customer contacts |  |
| 1. One-stop center |  |  |  |  | 29,127 customer contacts |
| 1. Itinerary planning |  |  |  |  | 605 customer contacts |
| 1. One-on-one transit training |  |  |  |  | 7,588 trained |
| 1. Transportation resource training |  |  |  |  | 2,268 trained |
| 1. Internet-based info |  |  |  |  | 54,180 customers served |
| 1. Materials and marketing |  |  |  |  | Various, including brochures, video, and newsletter |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| III. Capital Investment |  |  |  |  |  |
| 1. Vehicle for transit agency | 17,320 one-way trips  7 vehicles added | 579 one-way trips  4 vehicles added | 27,279 one-way trips  51 vehicles added |  |  |
| 1. Vehicle for other agency | 696 one-way trips  7 vehicles added | 1 vehicle added | 9,758 one-way trips  16 vehicles added |  |  |
| 1. Accessible taxis | 8,810 trips  30 vehicles added | 1,379 trips  2 vehicles added | 8 vehicles added |  |  |
| 1. Vanpool vehicles |  |  | 3 vehicles added | 4 vehicles added |  |
| 1. ITS investments |  |  | Various, including mobile data terminals, routing software | 250,542 one-way trips  183,609 customer contacts  Routing software, mobile data terminals, AVL | Coordination activities |
| 1. Elevators |  |  |  | Project design |  |
| 1. Large-capacity lifts |  |  |  | 3 added |  |
| 1. Wheelchair-securement areas |  |  |  | 26 added |  |
| 1. Other capital projects | Shelters, sidewalks, security lighting | None reported | None reported | Various, including shelters, sidewalk improvements, boarding pads, security cameras | None reported |

# Conclusions

This report includes the results of the data analysis for the FTA New Freedom program for the FY 2009 reporting period, which corresponds to the federal fiscal year beginning on October 1, 2008, and ending on September 30, 2009. The program goals correspond to federal performance measurements required by regulations.

## New Freedom Highlights

Grantees reported a total of 487 active New Freedom-funded services for FY 2009.

* New Freedom-supported services provided 2.4 million one-way trips, an increase of 89% over last fiscal year
* Out of the active NF-funded services, just over half were trip-based (54%). Information-based services made up 28% and capital investment projects, 18%.
* Demand response was the single most funded service, accounting for 24% of all services and providing 424,462 one-way trips (17%)
* Mobility manager contributed the most NF-funded one-way trips, 669,833, or 28% of all trips

This "mainstreaming" of people with disabilities truly addresses the spirit of the ADA. For example, one customer was a life-long ADA Complementary Service user who never rode the fixed route bus system, but after a few hours of training, he transitioned to riding the fixed route system exclusively and discontinued using the ADA Complementary Service. In nine short hours, he gained self- confidence and expanded his travel options.

Clark County Public Transportation Benefit Area (WA)

* Trip-based services were more likely to operate in non-urban areas, while information-based services and capital investment projects were more occurred more frequently in large urban areas
* Agencies used NF funds to acquire more than 80 vehicles and 40 accessible taxis. Together, these vehicle-related programs generated more than 65,000 one-way trips.

## Program Profiles

Finally, FTA continued to collect program profiles, or summaries, for each New Freedom service. While ridership statistics allow FTA to provide a national summary of the New Freedom program, the profiles allow the grantees to represent the human side of these transportation programs. These qualitative descriptions complement the data collection and provide an additional avenue for understanding the impacts and benefits of both grant programs.

The profiles provide a rich source of detailed information about the New Freedom program and are provided in their entirety under separate cover. For convenience, they are organized in 10 separate documents based on the FTA regions. In addition, relevant excerpts have been incorporated throughout this summary report. As the program profiles made abundantly clear, the JARC and New Freedom programs connect with riders and customers on a human scale.

Appendix A  
New Freedom Service Matrix

The following information describes in more detail how the New Freedom service matrix was developed and how NF grant recipients use it for annual Program Performance Evaluation (PPE) reporting purposes.

A JARC service matrix was initially developed through a collaborative effort between the JARC Evaluation Team and the Community Transportation Association of America’s Joblinks Advisory Committee. The matrix was later refined working with the JARC and New Freedom Advisory Committee, formed to assist the evaluation team with refinement of the JARC and later NF reporting process.

The intent of the matrix reporting approach was two-fold:

* Make reporting easier for grant recipients
* Capture performance information about non-traditional programs

First, the service matrix was designed to make it easier for JARC grantees to report on services provided. Once they selected the primary goal and service type, grantees were directed to a data entry form that included only those questions relevant to the service type / goal combination. For example, grantees reporting demand response services were asked to report the number of one-way trips provided, while those providing travel training were asked to indicate the number of individuals trained.

Second, the matrix structure represents the diversity of JARC-funded programs. The numbers associated with non-trip-based services like mobility managers and vehicle-loan programs are small in relation to one-way trips and jobs accessed, but they represent very real mobility benefits at a local level. The matrix approach allows FTA to capture this information and ensure that the benefits of these non-traditional programs are not overshadowed by the measures of one-way trips and jobs accessed.

Beginning with the FY 2007/FY 2008 reporting period, with the assistance of the JARC/New Freedom Advisory Committee, the JARC matrix reporting approach was expanded to include a companion matrix for the New Freedom program. The New Freedom matrix is organized with the same three categories of projects and the same set of five project goals as the JARC reporting matrix. However, the list of projects was modified to reflect allowable projects for NF funding as outlined in FTA Circular 9045.1 and subsequent guidance.

For PPE reporting purposes, the matrix is used to identify the primary goal for each New Freedom-funded service operated during the reporting year and to report output and outcome information related to the services provided as required to complete the federal Program Performance Evaluation.

To facilitate completion of the PPE forms, grant recipients were provided specific information via an on-line support site, email and phone support, and webinar training on how to use the reporting tools. Definitions were provided to help guide grantees in their choice of service and goal combinations. For example, trip-based services that are categorized as “flexible routing” include route deviation, point deviation, and other community circulators that may go off route to pick up individuals on a request basis. A “user-side subsidy” refers to individuals whose trip costs are subsidized by New Freedom funds including taxi vouchers, mileage reimbursements, underwriting the cost of vanpool seats, and so on. In contrast, trips provided through a “demand response” service would involve payment to an agency to subsidize the cost of running the vehicle, and not provide a direct subsidy to the individual user.

“Mobility managers” are an emerging service approach with a variety of responsibilities. For example, in some cases, a mobility manager is a clearinghouse of information about transportation services provided locally. Other mobility managers may schedule trips, but have nothing to do with the responsibility of providing (or paying for a trip). In these two cases, it would be most appropriate to report the number of customer contacts as a performance measure. However, some mobility managers also oversee the actual provision of service either by contracting with a provider or directly operating service themselves. In the latter case, it would be appropriate for the mobility manager service to report both the number of customer contacts enabled by the New Freedom program, as well as the number of one-way trips provided. It also should be noted that, although FTA allows for “mobility managers” to be funded as a capital program, they are considered information-based services for NF reporting purposes, given the nature of the service.

“One-on-one training,” included under the category of information-based services, requires additional explanation. “One-on-one training” includes teaching an individual on how to use fixed route bus service or providing instruction on how to care for and maintain a vehicle. “Trip/itinerary planning” is another specific form of assistance that provides individual assistance.

Finally, capital investment projects range from providing vehicles to individuals through low-interest loan programs, providing a vehicle for an agency to transport its customers, or vanpool vehicles if the cost of the vehicle lease is underwritten. In these cases, grantees would be asked to report the number of units (vehicles) provided and if available the number of one-way trips taken by New Freedom-supported participants. Other capital investments include amenities, such as adding bus shelters to waiting areas or bicycle racks on buses to allow access to a transit system.

New Freedom Service Matrix

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| I. Trip-Based |  |  |  |  |  |
| 1. Fixed route | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun |  |
| 1. Flexible routing | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun |  |
| 1. Shuttle/Feeders | # one-way trips  # miles added weekday / Sat / Sun | # one-way trips  # miles added weekday / Sat / Sun |  | # one-way trips  # miles added weekday / Sat / Sun |  |
| 1. Demand response | # one-way trips  # hours added within service area weekday / Sat / Sun  #hours added beyond service area weekday / Sat / Sun | # one-way trips  added within service area weekday / Sat / Sun  #hours added beyond service area weekday / Sat / Sun |  | # one-way trips  added within service area weekday / Sat / Sun  #hours added beyond service area weekday / Sat / Sun |  |
| 1. Same-day ADA paratransit |  |  |  | # one-way trips |  |
| 1. Door-to-door or door-through-door |  |  |  | # one-way trips |  |
| 1. Volunteer driver |  |  |  | # one-way trips |  |
| 1. User-side subsidy |  |  |  | # one-way trips |  |
| 1. Vanpool service |  |  | # one-way trips | # one-way trips |  |
| 1. Aide/escort assistance |  |  |  | # one-way trips |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Primary Goal | | | | |
| Service Type | (A) Expanded geographic coverage | (B) Extended hours/days of service | (C) Improved system capacity | (D) Improved access/  connections | (E) Improved customer knowledge |
| II. Information-Based |  |  |  |  |  |
| 1. Mobility manager |  |  |  | # one-way trips  #customer contacts |  |
| 1. One-stop center |  |  |  |  | # customer contacts |
| 1. Itinerary planning |  |  |  |  | #customer contacts |
| 1. One-on-one transit training |  |  |  |  | # trained |
| 1. Transportation resource training |  |  |  |  | # trained |
| 1. Internet-based info |  |  |  |  | # customer contacts |
| 1. Materials and marketing |  |  |  |  | descriptive |
| 1. Driver training (individuals) |  |  |  |  | # trained |
| III. Capital Investment |  |  |  |  |  |
| 1. Vehicle for individual |  |  |  | # one-way trips  # vehicles |  |
| 1. Vehicle for transit agency | # one-way trips  # vehicles | # one-way trips  # vehicles | # one-way trips  # vehicles |  |  |
| 1. Vehicle for other agency | # one-way trips  # vehicles | # one-way trips  # vehicles | # one-way trips  # vehicles |  |  |
| 1. Accessible taxis | # one-way trips  # vehicles | # one-way trips  # vehicles | # one-way trips  # vehicles |  |  |
| 1. Vanpool vehicles |  |  | # one-way trips  # vehicles | # one-way trips  # vehicles |  |
| 1. Car-sharing | # one-way trips  # vehicles |  | # one-way trips  # vehicles |  |  |
| 1. ITS investments |  |  | descriptive | descriptive | descriptive |
| 1. Elevators |  |  |  | # added  descriptive |  |
| 1. Large-capacity lifts |  |  |  | # added  descriptive |  |
| 1. Wheelchair-securement areas |  |  |  | # added  descriptive |  |
| 1. Other capital projects | descriptive | descriptive | descriptive | descriptive | descriptive |

Appendix B  
New Freedom Service Profiles

Under separate cover

1. Reports from CES and TranSystems on JARC /NF services in operation during FY 2007 / FY 2008 and FY 2006 (JARC only) can be found on the JARC program page of the FTA website at http://www.fta.dot.gov/funding/grants/grants\_financing\_9292.html. [↑](#footnote-ref-1)