



**FINAL REPORT
AND
BUSINESS PLAN**



Bayview Hunters Point Mobility Study



SAN FRANCISCO COUNTY TRANSPORTATION AUTHORITY | MAY 2013



ACKNOWLEDGEMENTS

This study and Business Plan are the product of shared work, energy, and enthusiasm across numerous individuals and organizations. The process has been truly collaborative, owned and shared by the many involved.

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Background and History

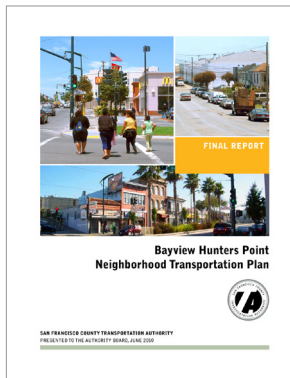
Overview

SAN FRANCISCO IS A CITY with a range of transportation options for most trips. However within the Bayview Hunters Point neighborhood (BVHP), residents, students, and workers with limited access to automobiles frequently face significant transportation barriers. Mobility is impaired for various reasons, but key factors include: limited public transportation service beyond the Third Street corridor; challenging topography; public safety concerns; the expense of transit fares and vehicle ownership; the absence of direct regional transit access within the community; and other issues. In particular, transportation barriers affect vulnerable and underserved populations within BVHP including youth, seniors, public housing residents, and persons with disabilities.

Over time various ad hoc and community-based strategies have developed to fill transportation gaps. These include such approaches as: carpooling and chauffeuring (giving passengers a ride); a “shopper shuttle” connecting seniors and paratransit riders to grocery stores; the use of vans and buses owned and operated by community-based organizations (CBOs) and social service agencies to serve specific clients populations for specific programs; and other, often informal, strategies.

This Report seeks to address these service gaps and to assist CBOs to provide more efficient, comprehensive, and coordinated service to the community. The Business Plan is the culmination of a multi-year collaboration among the San Francisco County Transportation Authority (the Authority) and the community partnership with other City agencies. The planning process began with the Bayview Hunters Point Neighborhood Transportation Plan (NTP), which was completed in 2010, and which identified opportunities for community transportation strategies to effectively respond to mobility barriers in BVHP. Development of this Business Plan was conducted as part of the BVHP Mobility Solutions Study (Study) funded through an Environmental Justice transportation planning grant from the California Department of Transportation (Caltrans).

During both the NTP and the current Study, a range of stakeholders and organizations have been engaged, including community residents, stakeholder groups, community advocates, CBOs, and City programs active in the community. These have included the Bayview Hunters Point MAGIC (BMAGIC) program and the Bayview HEAL (Healthy Eating Active Living)



The central role of transportation access in community health, particularly within Bayview, has been highlighted repeatedly in planning efforts and needs assessments.

Zone program¹ convened by the Department of Public Health (DPH). The Department of Children, Youth and their Families (DCYF) has also been a key partner.

A Study Team was formed consisting of Authority staff, technical consultants, and partner agency staff, and a Community Transportation Working Group was convened to guide the development of the Business Plan and serve as a liaison to the broader community. The Study Team has been working with the Transportation Working Group since summer 2012 to create this business plan.

This chapter of the Final Report describes the background and development of the Bayview Hunters Point Mobility Solutions Study. It includes:

- A summary of previous planning efforts and their findings, many of which provided the genesis for the Bayview Hunters Point Mobility Solutions Study and this Final Report
- An analysis of existing transportation resources in BVHP, including a summary of the results of the needs assessment and survey of community-based organizations and service providers
- An overview of the Transportation Working Group process and key decision milestones

Recent Planning Efforts & History

The central role of transportation access in community health, particularly within Bayview Hunters Point, has been highlighted repeatedly in planning efforts and needs assessments. These analyses have specifically identified the desire and potential to develop collaborative, partnership-based strategies to address transportation gaps in the community and improve service delivery outcomes.

The BVHP Neighborhood Transportation Plan, completed in June 2010, was a community-based transportation planning study led by the Authority in collaboration with community residents, stakeholder groups, neighborhood advocates, and CBOs. To engage the community organizations in the area, the Authority worked closely with BMAGIC, which provides umbrella collaborative services for many non-profit organizations working in the neighborhood. Among the key recommendations of the NTP were to undertake a focused, in-depth technical and community process to advance a community-supported pilot project concept for implementation—specifically to further explore the possibility of a van-sharing collaborative and volunteer driver program.

In 2011, the Authority received an Environmental Justice transportation planning grant from the California Department of Transportation (Caltrans) to develop the Bayview Hunters Point Mobility Solutions Study (Study), in collaboration with the community and partner agencies. A Study Team was formed consisting of Authority staff, technical consultants, and partner agency staff. Throughout the Study, the Study Team worked closely with CBOs including those convened by BMAGIC. During the Study, this broader group of CBO stakeholders expanded to include those participating in the Bayview HEAL Zone Program. As the HEAL Zone effort got underway in 2011, participants had independently (and in parallel) identified transportation access as a critical barrier to program effectiveness.

Other relevant studies that have been completed in recent years include:

- The 2009 BMAGIC Landscape Analysis
- DCYF's 2011 Community Needs Assessment
- DPH's 2012 Health Care Services Master Plan

¹ The HEAL Zone is one of the Shape Up SF Projects, partially funded by Kaiser Permanente. The goal of the HEAL Zone project is to help Bayview Hunters Point (BVHP) residents eat better and move more in places where they live, work, and play. The HEAL Zone will work with different organizations and businesses in the Bayview to help BVHP resident eat fewer calories, eat more fruits and vegetables and get more active. Transportation barriers and issues were a recurring theme in the HEAL Zone's needs assessment, making the project a natural partner for the BVHP Mobility Study. More information on the HEAL Zone can be found at <http://www.sfgov3.org/index.aspx?page=3254>

A brief summary of the findings and recommendations of each of these plans is included in Appendix A.

KEY THEMES & RECOMMENDATIONS FROM PAST PLANNING EFFORTS

Relevant themes and recommendations that have emerged from previous planning efforts are:

- Travel to and within BVHP without a personal automobile is difficult.
- The two key barriers to mobility in BVHP are safety and reliability. Public safety is a major concern for seniors and youth—both in access to transit (i.e. walking to stops, waiting at stops) and while riding transit (i.e. on board transit vehicles). While BVHP is served by the T-Third light rail line and several crosstown bus routes, and while much of the area is walkable with relatively flat streets and wide sidewalks, real and perceived safety concerns on the streets and on transit are formidable obstacles to use.
- Public transportation in BVHP is relatively infrequent, especially beyond the Third Street corridor. Transit service is also subject to reliability issues, and travel via transit typically requires multiple transfers to reach key destinations. Routes are circuitous and indirect, resulting in lengthy and inefficient travel times.
- There are no regional transit hubs in BVHP.
- Private cab service as well as paratransit is frequently viewed as unreliable, too cumbersome, or too expensive for many residents. Taxi operators are often reluctant to serve some areas of the neighborhood. Completion of eligibility paperwork for paratransit is complicated for some potentially eligible riders. There are also sizeable population groups within BVHP who do not qualify for paratransit, yet whose travel needs are not effectively met through existing transit services. Having to make advance reservations (as required by paratransit) is not practical for many trips.
- Several CBOs operate their own vehicles and transportation service or rely on employees to drive their personal vehicles; other organizations have no direct access to transportation services for their clientele.
- There is considerable interest in resource-sharing and coordination in ways that may fill some of the gaps and better meet the transportation needs of the community in a more holistic, organized, and cost effective manner.
- There is consensus that community transportation services should focus on the needs of those with no or limited access to automobiles, where there is potential for near and midterm improvement, and where such services would not duplicate existing services.

These themes and recommendations from prior plans provided the basis for this Study effort and the development of the Business Plan.

Existing Conditions And Needs Assessment

The Study undertook an assessment of existing transportation resources and services, which included consultations with community and agency stakeholders. This assessment found that, in addition to Muni transit service, there are a significant number of existing transportation services in Bayview Hunters Point. These services are minimally coordinated, often underutilized, and represent a substantial investment in transportation by the City and the community. A brief summary of existing community transportation resources follows.

In addition to Muni transit service, there are a significant number of existing transportation services in Bayview Hunters Point. These services are minimally coordinated, often underutilized, and represent a substantial investment in transportation by the City and the community.

EXISTING PRIVATE TRANSPORTATION SERVICES IN BVHP

Community Based Organizations

Many CBOs, particularly those serving youth, have responded to the unique attributes of the Bayview Hunters Point community by taking on the responsibility of transporting their clients to and from programs. The rationale for these services is influenced by a combination of factors. Some program sites are not easily walkable from schools or homes (e.g., Willie Mays Boys & Girls Club is located on top of a steep hill). Safety issues are a concern, such as when traveling between home/school and the program site. Muni service is insufficient or inappropriate due to availability, cost, and/or travel time involved. It is worth noting that, in many cases, the high level of transportation services provided by these CBOs is not typical (even as compared to similar organizations in other neighborhoods).

Churches

In addition to fleets operated by many CBOs, multiple churches in BVHP have at least one van used for church activities. The assessment did not comprehensively review the needs and resources of faith-based organizations.

Informal Peer Driver Network

Unmet needs are frequently met in BVHP, as in most communities, by an unofficial cadre of volunteers of friends, family, and neighbors who provide transportation and escort services informally.

Residential Shuttles

New developments near BVHP, such as at Executive Park, have funded their own shuttle services to link residents to key destinations such as BART and Caltrain stations.

Agency Funding

DPH, DCYF, the Department of Aging and Adult Services (DAAS), the Authority, the SFMTA, and others have made and/or are currently making investments in transportation services in BVHP both directly and indirectly.

PREVIOUS COMMUNITY SHUTTLE EFFORT: THE COMMUNITY HEALTH SHUTTLE

Although no longer in operation, the Community Health Shuttle operated in BVHP from 2008 to 2012. Initial funding was provided by the Metropolitan Transportation Commission's Lifeline Transportation Program, with a final year of funding provided by the Transportation Fund for Clean Air (TFCA). The shuttle's original scope of services included operation of a 16-passenger bus service, with hourly service between health and medical centers in BVHP and two hospitals beyond the neighborhood. The service schedule changed somewhat over time: routes and schedule changes were made, and a second bus was added to provide "demand response" service at certain times of day. Due to the complexity of the operation and the many stakeholders involved, communicating with key health provider partners and maintaining service reliability proved challenging, as was raising awareness with community and health stakeholders. Grant reporting indicated lower ridership than was anticipated or desired.

The Community Health Shuttle was operated as a separate and single-focus business entity by the Bayview Hunters Point Foundation for Community Improvement. In its final year of operation, operational funding was \$172,000 annually to operate the service, including labor, vehicles and maintenance, fuel, management, and insurance. The transportation service was provided by an outside contractor who supplied all labor and vehicle-related services, with the overall program managed by the CBO grant recipient.

NEEDS ASSESSMENT: SURVEY OF COMMUNITY-BASED ORGANIZATIONS & SERVICE PROVIDERS

In the spring of 2011, the Study Team conducted a needs assessment, including a survey of six agencies that currently (or recently) provided transportation service in BVHP. The focus of the survey was primarily to assess costs for current service provision. The agencies surveyed were:

1. Willie Mays Boys & Girls Club
2. Bayview Hunters Point YMCA
3. Bayview Hunters Point Family Agency
4. Brothers Against Guns
5. BVHP Health and Environmental Resource Center (HERC)
6. Bayview Hunters Point Foundation for Community Improvement (operator of the Community Health Shuttle described previously)

The costs included here are based on information provided by each agency; however, none of the agencies currently maintains unified tracking of all of the costs associated with providing transportation services. Therefore a “low” and a “high” cost were estimated. Drivers account for the largest expense (nearly 50%), followed by vehicles and maintenance, fuel, and then management and insurance. The table below aggregates transportation-related costs for agencies interviewed excluding the Bayview Hunters Point Foundation’s shuttle (which was operating at the time of the data compilation).

Table 1-1: Summary of Current Transportation-Related Costs for CBOs

DESCRIPTION	LOW ESTIMATE	HIGH ESTIMATE
Drivers	\$245,000	\$299,000
Vehicles and Maintenance	\$85,000	\$107,000
Fuel	\$72,000	\$72,000
Management and Insurance	\$24,000	\$36,000
TOTAL	\$426,000	\$514,000

Collectively these six agencies deliver the following:

- Operate between 43,000 and 65,000 miles per year,
- Provide between 8,100 and 9,850 hours of service to the community, and
- Provide between 29,200 and 47,200 passenger trips.

Average cost per hour ranges from a low of \$53 to a high of \$80, and costs per passenger trip range from \$9 to \$18. There is significant duplication both in need and actual service among the agencies. For example, several agencies pick up school-aged children from the same schools to attend after-school programs between 2:30pm and 4:00pm and then take the same youth home between 6:30pm and 7:30pm. Similarly, youth-serving agencies regularly schedule field trips, often to similar destinations.

While transportation is critical to both program participation and success for every agency interviewed, including those who do not operate any transportation services, it is not part of any agency’s core mission or competence. In many cases, providing transportation service is at the expense of staff for core programming and services.

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The Study Team conducted an analysis of these programs using information from the programs and some industry-standard calculations to determine cost break-downs. The results indicate:

- Professional staff are driving between one and four hours per day, reducing the time they are available for actual programs significantly.
 - » Hourly labor rates for staff drivers ranges from \$12 to \$25 per hour, excluding benefits.
- Other high-level professionals are engaged in the ongoing management/oversight and administration of transportation services, ranging from 20 to 60 minutes per day.
- The use of replacement drivers, when the usual staff member is unavailable, typically causes disruptions to other program staff and reductions in staff availability for programs.
- When vans are unavailable due to maintenance issues, programs suffer.
- While most of the youth-serving CBOs use 15-passenger vans, these fleets are not necessarily “right-sized.” The removal of three seats to conform to California Department of Motor Vehicles rules that require commercially licensed drivers for 15-seat vans instantly reduces capacity by 20% system-wide. This underperformance makes the vehicles less efficient and more costly than: a) utilizing smaller vehicles which are more economical to buy, maintain, and operate; or b) taking advantage of operating at full capacity.
- Trips are sometimes inefficient, with vans picking up partial loads at schools and making duplicative trips into the community. Likewise, vans are often used for trips that could be made more economically in an automobile (i.e., case management trips).
- Several of the vans will be nearing the end of their life cycle soon.
- Vans are not large enough to be used efficiently on most field trips.

This analysis of existing transportation services was important for development of the Business Plan; the eventual pilot proposed in Part C was designed to enable agencies to get comparable service for lower cost or more service hours for the same costs.

GUIDING PRINCIPLES FROM STAKEHOLDER ENGAGEMENT AND NEEDS ASSESSMENT

A number of themes and priorities emerged from these initial organizational interviews and surveys, they are listed below. These themes formed the basis for the goals for the proposed pilot and informed the elements critical to pilot design; these are articulated in Chapter 2.

- Any new program or service must address a key issue or need expressed by the community.
- Collaborations must be an effective use of valuable staff time and resources for participants.
- Programs or service must serve more customers in BVHP.
- Programs or services must provide professional service standards, performance and financial accountability, and management to participants and partners.
- Any program involving cost-sharing should reduce costs for participating partners.
- Programs should increase coordination opportunities among partners and reduce duplication.
- Programs should improve operating efficiencies such as cost per mile, cost per passenger.

- Programs should have appropriate marketing support to build awareness.
- Programs should be designed to achieve sustainability.
- Programs should address multiple policy goals (such as coordinating social, health, and educational services) in ways that support more holistic outcomes.
- Programs should be implemented within a relatively short timeframe as pilots or demonstration projects with strong conceptual and operational support for the program from partners but with potentially reduced financial burden on participating CBO community partners for the pilot period.

Transportation Working Group Formation

In August 2012, the Study Team invited members of community-based organizations who had previously participated in the Authority's BVHP Mobility Study, members of the HEAL Zone initiative, and other interested community representatives to form a Transportation Working Group (TWG). The purpose of the TWG was twofold: 1) short term, the group was charged with guiding the development of a Business Plan for a pilot transportation project responding to priority community access and mobility needs that support improved health and wellness in BVHP; and 2) longer term, the pilot project and Business Plan will inform new models of service delivery with the potential to be implemented and scaled sustainably in both BVHP and other districts of San Francisco.

A general presentation was made at the August 2012 BMAGIC Convener meeting. During this meeting, the overall goals of the collaborative effort were articulated, was an ambitious meeting schedule with topics to move the Business Plan process forward over a six month period. Specifically, the group was charged with the following outcomes:

1. Setting overall service goals and targets
2. Recommending specific programmatic components and service models
3. Establishing guiding principles and general operational requirements
4. Creating consensus on inter-organizational arrangements and governance
5. Addressing liability and insurance provisions
6. Approving a Business Plan outlining a pilot project

Participants were encouraged to execute an official Memorandum of Participation (MOP) to memorialize their level of interest and their commitment to attend monthly meetings, keep their respective leaders informed, and participate throughout the process as needed (a copy of the MOP template is included in Appendix B). Members of the Working Group have been fully engaged since the first meeting in September. Every session has been well-attended; discussion has been lively, robust and productive. Consensus decisions were reached in prioritizing benefits, selecting the types of trips to be provided, and defining key operational and organizational elements for a pilot project.

In total, 18 individuals served on the Transportation Working Group representing the following organizations:

- A. Philip Randolph Institute
- BMAGIC
- Black Coalition on AIDS
- San Francisco United School District/Bayview Superintendent Zone
- Southeast Health Center
- Bayview Hunters Point Multipurpose Senior Services

Members of the Working Group have been fully engaged since the first meeting in September. Every session has been well-attended; discussion has been lively, robust, and productive.

- Parks 94124
- HOPE SF / Mayor's Office of Housing
- SEFA Food Guardians
- Bayview Health and Wellness Center
- Bayview YMCA
- City of Dreams

A full roster of TWG members is included in Appendix B.

PEER CASE STUDIES AND VEHICLE SHARING WORKSHOP

Case studies were presented to the Working Group. These drew on longstanding, successful programs in operation around the United States which provide similar types of trips to constituents as those prioritized by the BVHP Transportation Working Group. Case studies included:

1. Santa Barbara's EasyLift charter services and vehicle sharing program
2. Napa Transit's loaner vehicle program
3. Transportation Management Agencies/Organizations (TMAs and TMOs) and other organizations providing specialty transportation services to youth and seniors
4. Emeryville's 8 to Go senior/disabled van service
5. Beverly Foundation's templates for volunteer driver programs
6. Pasadena's PASS Ride volunteer driver program
7. Portland Ride Connection
8. San Mateo County Vehicle Sharing Demonstration Program
9. Car-sharing business models
10. Independent Transportation Network's volunteer driver programs

In February the Study team also hosted a Vehicle-Sharing Workshop that included a morning panel with speakers from San Mateo, CA; Portland, OR; and Napa County, CA sharing their experiences launching and managing vehicle-sharing programs. The afternoon featured an interactive discussion among the panel and Transportation Working Group members. The Working Group sought specific advice and feedback on the Business Plan. The Working Group expressed the importance of understanding conditions unique to BVHP and of taking into account community disparities, disadvantaged populations, and a legacy of broken promises and unimplemented plans. (The invitation and program from the workshop are included in Appendix D.)

Following the workshop, members of the Study Team also met with a local van-sharing program sponsor that has been operating in the Mission for several years. The peer programs provided important education for the TWG and implementation guidance that was used in development of the business plan.

Key Transportation Working Group Priorities

The TWG met once a month from September 2012 to March 2013. The robust discussion at each meeting directly informed the alternative solutions studied and the formation of the Business Plan. Key decision-making milestones for the group were:

- Prioritize travel markets and needs
- Develop criteria for project prioritization
- Analyze and discuss potential service models, issues, and tradeoffs

- Select an implementation approach
- Determine project phasing

Key decisions the group made on these issues are summarized below. These were the decisions that most directly shaped the operational model for the business plan. A full summary of meeting outcomes is included in Appendix B.

TRAVEL MARKETS TO BE SERVED

Consistent with the findings from the Neighborhood Transportation Plan, the TWG determined that community transportation services should prioritize the youth and senior populations of BVHP. The primary focus of the project should be on group trips for youth that support community based organizations’ programming—particularly after school-programs—with a secondary emphasis on group trips for seniors to meet medical and health needs, and on group trips to improve access to healthy food.

Both youth and seniors have well-documented needs, and the potential benefits from improving access to BVHP’s array of specialized programs and services for these populations are many. In addition to the obvious “baseline” of making more services available to more people, the potential for improved and more holistic outcomes—both short term and long term—is significant.

Table 1-2: Priority Trip Types to be Served

Youth and Families	CBO programs (especially after-school)
	Local trips
	Excursions
Medical and Senior Trips	South East Health Center (SEHC) appointments
	SF General Hospital and St. Luke’s Hospital
	Pharmacy
	Health events
Food Access	Groceries
	Food pantries
	Farmers market

CRITERIA FOR PROJECT PRIORITIZATION

The TWG prioritized the following criteria for project implementation:

- Community capacity-building and cohesion
- Responsiveness to transportation needs
- Cultural sensitivity (drivers and project staff trained to communicate well with the diverse communities of BVHP)
- Safety
- Ease of start-up and ongoing management and operations
- Cost and efficiency
- Environmental sensitivity

These are described in detail in the project goals and objectives in the following chapter.

The working group decided that the primary focus of the project should be on group trips for youth that support community based organizations’ programming—particularly after school-programs—with a secondary emphasis on group trips for seniors to meet medical and health needs, and on group trips to improve access to healthy food.

POTENTIAL SERVICE MODELS, ISSUES, AND TRADE-OFFS

The Working Group reviewed and analyzed a wide range of strategies which fall along a spectrum from small, initial changes to existing programs (which could be implemented quickly and easily) to larger strategies which would involve more significant shifts in how transportation and other services are organized and provided. By their nature, these larger, more comprehensive reforms would take longer to design and implement, and would require greater levels of partnering, funding, and operations management.

The TWG considered a variety of service approaches, including:

- Vehicle Pool/Network
- Shuttle Services
- Volunteer Driver Program

A full summary of the service options that were considered is included in Appendix C.

The group considered the advantages and trade-offs of these approaches across a range of operational considerations including:

- Vehicle type(s): New or existing vehicles, vehicle size, model, fuel type, etc.
- Vehicle provision method: A buy/finance model where vehicles are purchased collectively or a “turn-key” model where vehicles are provided through a private contractor
- Sharing approach: Shared service targeting particular markets/trip types or a reserved service used by specific programs
- Management and administration capacity: Community operated and administered, operated through a contractor or a fiscal sponsor, or a hybrid model
- Operational model: A community operated service with “loaner” vehicles or a turn-key contract through a private operator

Key trade-offs between a contracted model and a community-operated model are illus-

Table 1-3: Service Delivery Options comparison

FULL TURN-KEY	COMMUNITY-OPERATED
Service reliability and consistency	Need to acquire vehicles
Readily scale-able	Utilize member staff as drivers
Ease of implementing joint service	Greater flexibility for less frequent users
Driver training and retention	Requires mobility management capacity to administer
Benefits from including a mobility management capacity	Longer start-up period
High operating costs	

trated below.

PREFERRED IMPLEMENTATION APPROACH

After considering the tradeoffs of different service models and delivery approaches described above, the TWG narrowed the choices to an initial recommendation of a shared van service with a secondary emphasis on a volunteer driver program. They also expressed a desire for contracting essential service elements to guarantee reliability of service and demonstrate a successful program. However, the Working Group also stressed the need for

active community involvement and potential hiring/business development opportunities for the community over time.

Other key decisions that informed selection of a preferred service model were:

- Vans are more practical and flexible for trips that are low-volume and high cost, and require a great deal of flexibility by different agencies who would utilize them.
- New vans, regardless of the type of fuel used, will be more efficient and less polluting than the current fleet of older vans currently in use by most agencies.
- Using a commercial driver will allow vans to be used at their full capacity and thus be more efficient.
- Shared service is a good model to pursue for the potential pilot due to the efficiency and potential cost savings.

The other key decision that the TWG made regarding the implementation approach was to focus on developing a discrete and achievable pilot to demonstrate collaboration and success.

The preferred implementation approach selected by the TWG is a pilot van sharing project provided through a “turn-key” service contract with a community-based mobility manager and a Community Advisory Board, who will provide oversight and key linkages with the community.

The group also expressed an interest in incorporating a volunteer driver program in the future as a potential later phase of the project.

PILOT APPROACH

Launching this effort through a pilot project has several advantages. It allows for defining a discrete and manageable first phase of work that provides a “proof of concept” by demonstrating successful collaboration and service delivery, while maintaining the promise for a broader range of services that are owned and managed by the community over a longer time horizon. More complex programs and services will be easier to implement once these first efforts have established credibility and have proven their ability to improve mobility and customer satisfaction. The pilot can then be used to encourage more community partners to participate as well as to attract funding from outside sources.

The pilot provides an opportunity for the CBOs to establish collaborative relationships to provide a coordinated approach to transportation services and, within its 12-18 month timeframe, it allows for the flexibility to refine services as needed. This will ensure the services work well for each CBO member as well as their respective users. The pilot also provides an evaluation mechanism to measure whether specific goals have been achieved, or whether goals have shifted. This monitoring process will inform the design of the service as it moves into post-pilot phases.

The TWG envisions the pilot as providing the foundation for future growth. Ultimately, the TWG aims to have a permanent mobility program that will encompass an array of transportation services. This Business Plan focuses primarily on implementation of the pilot project. The final chapter includes an overview of potential future post-pilot expansion opportunities.

TRANSITION PERIOD

During the final meeting in March 2013, the Working Group decided that BMAGIC will take on a “convener” role during the transition period until establishment of the official advisory board for the pilot project. During this period, the entire group will decide what

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the leadership will look like in the longer term and which organizations will be responsible for which roles in the pilot.

Summary

This Business Plan builds on a long history of planning and community involvement around transportation issues in BVHP. The history and background described herein, including recommendations from past plans and lessons learned from existing Bayview services as well as from successful peer programs and extensive stakeholder input, particularly from the Transportation Working Group, all provided critical groundwork for development of the Business Plan.

The Business Plan provides a detailed road map for implementation of the pilot van-sharing project in BVHP, including a schedule, budget, and organizational structure. It can be used as the basis for grant funding opportunities and community outreach. The issues addressed in subsequent chapters include:

- Goals and Objectives
- Pilot Project Description and Delivery Approach
- Annual Operations Budget and Startup Costs
- Funding Approach
- Performance Measurement and Evaluation
- Medium- and Long-Term Opportunities

The launch of this project represents the long-awaited culmination of years of work on the part of many individuals throughout the community and the City.



2

Goals and Design Objectives

Goals

The over-arching purpose of establishing locally managed, community-based transportation services is to transport Bayview Hunters Point youth and seniors between their homes, schools, and essential health and wellness community services in a safe and efficient manner.

By reducing barriers to access to these services, Bayview residents will have the opportunity for increased participation in programs and services that support healthy lifestyles, particularly through greater physical activity and improved nutrition.

Four specific goals were identified for the pilot project:

- **Access.** Increase access for Bayview residents to an array of health and wellness services with particular emphasis on improving access for the neighborhood's most isolated communities.
- **Efficiency.** Improved operating efficiencies in delivering transportation service for community-based organizations.
- **Community Capacity Building.** Develop community capacity for long-term oversight and management of a collaborative mobility program.
- **Sustainability.** Design pilot project to support sustainability for a long-term mobility program.

Ultimately the overarching goal for the pilot project is to be successful enough that the service continues beyond the pilot phase and serves as a foundation for an expanded community-based mobility program in the future.

Elements For Pilot Project Design

The Transportation Working Group also prioritized the following elements as critical to pilot project design:

- Safety
- Efficiency
- Ease of Start-Up and Ongoing Management
- Community Cohesion, Inclusion, and Ownership
- Environmental Responsibility
- Cultural Sensitivity

Each is described in more detail below.

Safety

Safety is a paramount concern in this community. Real and perceived threats to personal safety are major barriers to residents' ability to access and participate in essential programs and services. Many seniors prefer to travel with other seniors rather than with youth passengers or on general transit services. Different groups of youth may sometimes need separation from one another to assure safe passage throughout the various neighborhood pockets of the BVHP community. This project has been designed to address these fundamental concerns while also working to foster a new sense of respect, etiquette, and understanding among diverse age and population groups that may extend beyond this project and be of benefit to the community.

Efficiency

Community-based organizations (CBOs) in BVHP that currently provide transportation for their clients do so on a limited basis. Collectively, these services are not cost efficient. Providing transportation service is not part of any of the agencies' core mission or competence, and the resulting service is limited, expensive, and often unreliable. Some agencies own and maintain a vehicle, which has fixed costs regardless of whether it is used one hour each day, or all day, every day. Many of the CBOs that operate 15-passenger vans have removed seating capacity to avoid having to hire a commercially licensed driver and to allow use of program staff as drivers. Cumulatively, five agencies interviewed and analyzed during the Mobility Study's needs assessment spend over \$500,000 annually on transportation. Others, who wish to "charter" service for occasional field trips, pay high rates for vehicles and must pay for minimum time commitments that exceed their needs. This pilot project provides services through a collaborative partnership among CBOs that can effectively spread costs among many users, utilizes vehicles more efficiently, and offers participants cost savings and/or access to more service(s) for comparable cost.

Ease of Start-up and Ongoing Management

Effective implementation and ongoing management is critical to short-term success and long term sustainability of a BVHP mobility program. Starting a new nonprofit transportation management organization requires commitments from agencies already stretched for resources. It adds yet another element of administrative activity. At the same time, providing reliable, safe transportation to support community programs requires technical expertise and administration/management that resides "in the community" for quality control, inclusion, and capacity building. The organizational structure of this pilot project assures professional transportation management and operations, efficient community-driven governance, professional business and fiduciary management, and an open community process.

Community Cohesion, Inclusion and Ownership

As described in Chapter 1, over 15 CBOs and community advocates actively participated in the Transportation Working Group over seven months. The Study Team also interviewed and made presentations to community stakeholders and groups to determine the level of interest in a collaborative project. The pilot project will be an inclusive and community-based endeavor that reflects the values and priorities of BVHP's diverse neighborhoods.

The Transportation Working Group strongly indicated that the pilot and any subsequent projects need to be deeply rooted in the community and locally managed. It determined that the pilot be guided by a Community Advisory Board (CAB), which will provide overall direction and priorities for transportation services. The CAB will be the face of the community and will directly interface with the community on a regular basis. 'Partnership' and access to transportation services will be open to any community-based agency that meets minimum criteria set by the CAB. As demand for services and the number of partners

grow, so can service. The CAB will establish policies for further community participation, such as hiring practices, training, and mobility management and coordination activities.

Environmental Responsibility

In addition to inefficiencies associated with individual agencies currently operating their own transportation service, there is a fair amount of duplication (i.e., several agencies picking youth up at one school) in current service delivery. Reducing the total number of vehicles on the street through a shared service concept reduces environmental impacts such as total fuel consumed, emissions generated, and roadway traffic. Replacing vans which are 10-plus years old with newer models further improves environmental outcomes. The pilot and longer term projects will seek to incorporate alternative fuel source vehicles as feasible.

Cultural Sensitivity

BVHP has one of the most diverse populations in all of San Francisco. Demographically, the neighborhood has shifted over the course of the past 20 years from a predominantly African American community to a neighborhood that is no longer dominated by any one ethnicity or racial group. The three main demographic categories are Asian, African American, and Latino; but this fast-evolving community also has growing numbers of other cultural and ethnic populations including Eastern European and Middle Eastern immigrants. The pilot project's transportation services will be marketed, available, and delivered to a diverse population in culturally sensitive and respectful ways.

Summary

The Bayview Hunters Point community has a history of planning efforts which have not resulted in timely implementation of services or which have resulted in programs that were not sustainable. It is critical that this project succeed in delivering its promise of putting credible service "on the street" in the short-term and designing services for long-term sustainability.

Building trust and community capacity among the collaborative partners who will work together to oversee transportation services and facilitate how the community will work together are just as important as the commitment to achieve the pilot project goals. The strong desire for local involvement and participation will be supported by the pilot's governance structure, which will ultimately establish both policies and levels of service to be provided through collaborative partnerships among participating CBOs.

Both the conceptual service models to be employed and the specific practices to be used within each model build on key "lessons learned" from past programs in BVHP and elsewhere, including successes, challenges, and attributes needed for long-term sustainability. We have drawn extensively from those which have survived the test of time and are considered highly successful.

It is critical that this project succeed in delivering its promise of putting credible service "on the street" in the short-term and designing services for long-term sustainability.

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3

Pilot Project Description and Delivery Approach

Overview of Pilot Project

THE PILOT PROJECT is a shared van service operated through a contractor that will be primarily utilized by CBOs who serve youth and seniors. CBOs will form a collaborative partnership to buy a block of hours from a private vendor and partner organizations will then reserve blocks of hours to serve their client needs. The pilot will include a community-based mobility manager who will be the community liaison for the pilot project and assist CBOs to figure out the best ways to share the available pool of hours. The pilot will also include a Community Advisory Board to provide additional community oversight and guidance and a Fiscal Sponsor to provide the requisite nonprofit 501(c)3 umbrella and necessary professional administrative and “back office” services. This pilot design was selected to expedite start-up, minimize risk, and provide maximum accountability for service delivery, while still having a foundation of community involvement and ownership and utilizing existing community resources where possible.

This is a program for CBOs and community groups, not for trips made by individuals. The pilot project is designed to produce value for three types of community-based organizations:

- Providing *new service* for organizations who currently have no transportation services
- Providing service trips that are *more efficient* for organizations who currently only have access to limited “charter” type services on an occasional basis
- Enabling CBOs to *expand* their reach to new program members/constituents and/or reduce overall transportation costs for organizations who currently provide some type of private, in-house service

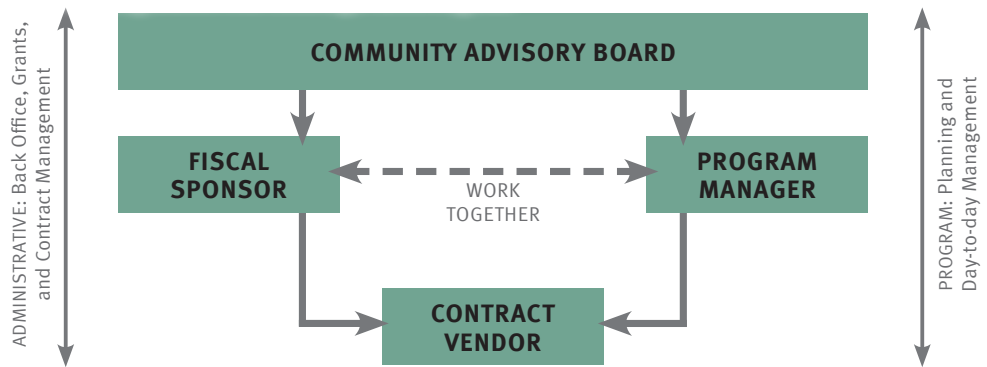
The pilot will demonstrate for its CBO partners how programs and services can benefit when safe, reliable transportation is available and integrated into program delivery. This type of collaboration also starts to build structural capacity within the community to work together to plan, deliver, and manage services in a manner that will help ensure longer term success.

As described in Chapter 1, because demonstration of early success is important to all stakeholders, this pilot project will start on a small, manageable scale to serve a discrete set of critical service gaps in the

community. However, the pilot is designed to become a permanent program in the future, with the potential to expand in scope and/or geography over time. Over the medium-term, as the pilot project establishes credibility, the project will have the opportunity to expand its initial services and add new services. A second phase may develop a volunteer driving program, with an emphasis on serving two public housing sites, Hunters View and Alice Griffith; this is further described in Chapter 6, Mid-Long Term Program Opportunities.

An overview of the organizational structure of the pilot is provided on the following page and each component of the pilot project is explained in Figure 3-1 below.

Figure 3-1: Proposed Organizational Structure for Bayview Hunters Point Community-based Van Sharing Pilot Program



Responsibilities

COMMUNITY ADVISORY BOARD

Community representatives

- Leadership Council
- Oversight/Governance
- Establish policies
- Fundraising
- Provide technical assistance/guidance
- Represent broad interests in community

PROGRAM MANAGER

Existing organization active in the Bayview

- Day-to-day operations/management of vendor (incl. customer service)
- Service planning
- Marketing and community relations
- Progress reports to Fiscal Sponsor and Board
- Mobility management

FISCAL SPONSOR

501 (c)(3) Foundation, also responsible to their own board

- Provides 501(c)(3) status
- Accepts donations and grants
- Provides financial reports, accounting, and tax filing
- Develops legal contracts and other organizational documents
- Provides “back office services” including payroll, HR, grants management, risk and legal management
- Holds contracts with Program Manager, Vendor(s), and Contractor(s)

CONTRACT VENDOR

- Operate and maintain vehicles

Shared Van Service

HOW A SHARED VAN SERVICE MODEL WORKS

The shared van service model is most simply defined as several organizations sharing use of a single vehicle throughout the day. The collaborative will buy a block of hours from a private contractor to provide the vehicle. Each partner agency will pay for its use on an hourly (or other predetermined) basis and together, the agencies ensure that the vehicle is utilized for the bulk of the day. Efficiencies result from sharing many fixed costs (such as vehicle acquisition, maintenance and insurance) among several partners, and having one vehicle on the road throughout the day instead of several vehicles for short periods of time.

The shared van model builds on successful models used by other social service transportation organizations and integrates lessons learned from the growth of carsharing to achieve operating and cost efficiencies. It lowers costs for individual CBO partners by increasing the utilization of each vehicle and spreading fixed costs over several partners and a greater number of hours. Centralized oversight and management enables partners to simply reserve a vehicle either on a recurring or an as-needed basis through a single portal.

Some CBO partners will have standing reservations for certain, pre-set time blocks of usage. At other times, the vehicle will be available for other CBO partners based on availability. Organizations can take advantage of these windows of availability for short field trips and special events. Growth will occur organically, as demand for more regularly scheduled service and the need for charter (one time use) trips grows.

Participating CBOs will sign a simple agreement to become a partner of the shared van pilot project and have access to the shared vehicle. The agreement will specify the types of permitted uses (i.e., group trips), costs, scheduling requirements and other logistics. It will also specify billing and payment procedures.

The transportation service itself is provided by contracting with a private vendor, whose business is to provide equipment, labor, and other necessary services (i.e., insurance, maintenance, etc.). This frees each partner from having to devote management and staff time to deal with direct transportation administration/provision. Contracting with a private vendor for service delivery also reduces administrative burden and assures service reliability.

All costs for the shared van service will be determined and published in advance. CBO partners will be able to include transportation costs as a line item in program budgets and know exactly what they are spending per program and per customer. Evaluation of the pilot will include an analysis of the benefits of transportation with respect to their program outcomes and participation rates. This will enable CBOs to build realistic costs into future funding requests and to report these metrics to their respective funding partners.

A shared van model encourages partners to operate joint trips that simultaneously meet multiple needs. This further lowers the cost of service for each partner, increases overall operating efficiencies and makes service available to more customers. For example, youth may be picked up at one school and taken to several after-school programs, instead of just to a single agency. Rather than one agency absorbing the full cost of providing that service, the cost is spread across several agencies. The financial advantages of operating joint trips are shown in the Table 3-1 below.

Other types of trips may be combined for efficiency as well. Medical, food, and senior trips can be combined and scheduled into one single run when several such destinations are within close proximity to each other. For instance, a partner CBO could schedule a van to pick up riders at one housing site and drop them at several destinations. Over time

The shared van model lowers costs for individual CBO partners by increasing the utilization of each vehicle and spreading fixed costs over several partners and a greater number of hours.

programs can proactively collaborate with one another to maximize trip efficiency—for example, the senior center could take a group to a Farmers Market or to a health screening. Establishing “health nodes” in local communities is a goal of San Francisco’s new Master Health Care Service Plan and has already begun in BVHP. This trend of locating more health services along BVHP’s Third Street² provides more opportunity for collaboration and sharing of trips.

Trip sharing may be limited by the size of the vehicles.

Table 3-1: Financial Advantages of Operating Joint Trips

RUN TIME	SINGLE USER	SHARED		
		2 PARTNERS	3 PARTNERS	4 PARTNERS
1 hour	\$50–80	\$25–40	\$16–27	\$13–20

The shared van service model allows the pilot project partners to flexibly respond to a diversity of unmet mobility needs. By their nature, such trips are not readily served by traditional fixed-route transit (due to lengthy travel times, long walking distances, excessive transfers, or inconvenient service hours on fixed-route transit). Many residents don’t qualify for paratransit for these trips, or the paratransit service model isn’t a good match, and for many residents driving alone isn’t an option. The shared service model also allows for a great deal of flexibility among the various CBOs as their needs change.

SHARED VAN SERVICE TRIP TYPES

The pilot will focus on providing three types of trips:

1. Weekday Youth Trips. Priority trips include:
 - a. Transportation for young adults to and from job opportunity and workforce development programs
 - b. Transportation for elementary and middle school youth between school and after-school programs and then transporting those children home at the end of the day
 - c. Field trips and short, local excursions for youth in after-school programs
2. Medical Trips. Priority trips include:
 - a. Transportation to and from home to the Southeast Health Center
 - b. Transportation to and from and between various health clinics and resources in BVHP (i.e., between Southeast Health Center and mental health clinics)
 - c. Transportation to pick up prescriptions which are only available at a non-Bayview pharmacy
3. Seniors, Health and Community Events, and Food Access
 - a. Transportation to and from home and the Senior Center and other sites for group activities
 - b. Group activities (i.e., grocery shopping) that are organized by a community-based organization

The pilot project will facilitate participation in the above programs and services for residents of the geographically isolated portions of the community, including Hunters View and Alice Griffith.

² BVHP Redevelopment Plan and Health Care Services Master Plan

Mobility Management

WHAT IS MOBILITY MANAGEMENT?

Mobility Management is an innovative approach for managing and delivering coordinated transportation services to customers. It is particularly effective for delivering service to older adults, persons with disabilities, and lower income households. One of the fundamental features of mobility management is having a single point of contact to address transportation questions or issue.

Mobility Management is customer-driven, focusing on meeting customer needs through a range of transportation options and service providers. A Mobility Manager generally works in several capacities: marketing and brokering a “family of transportation services” to assist individuals in meeting travel needs; providing travel training and navigation for individuals, community organizations, and other small groups with specific needs; and providing referrals, advocacy, and policy coordination on behalf of the community. While the scope of a Mobility Manager for the pilot project will not be this comprehensive, it will focus on those activities that best support partnering CBOs and their respective customers in utilizing the shared services described above.

A Mobility Manager operates from a customer service perspective while ensuring that transportation and mobility needs are met. With a Mobility Manager, barriers are reduced by having a person dedicated to disseminating and monitoring information about the range of services available to the people who need it, helping them access those service (i.e., referrals and assisting in eligibility and registration), and lastly, helping them learn how to use those services through activities such as demonstration rides, travel training, and travel ambassadors.

BAYVIEW HUNTERS POINT MOBILITY MANAGER

The Mobility Manager for this pilot project will be charged with:

1. Handling day-to-day operational coordination between partners and the vendor
2. Providing customer service and marketing
3. Being the liaison with the Fiscal Sponsor

The Mobility Manager will be the “community face” of the pilot. The Mobility Manager will be responsible for day-to-day service coordination and will serve as the liaison between CBO partners and the vendor. The Mobility Manager will work with organizations to help them figure out the best ways to share the available hours. The Mobility Manager will also be responsible for marketing and will be instrumental in seeking local participation and maintaining this participation over time.

A key function of the Mobility Manager will be to provide travel training and ambassadorial services for the project’s CBO partners. This component is essential in helping CBOs and, by extension, riders become familiar with how the service works and how it can help them access specific health and wellness resources and participate more fully in the community. This is a role that is quite broad and the Mobility Manager will have to set realistic expectations for how much one-on-one assistance can be provided during the pilot period. In the longer term, the TWG desires this function to be expanded to be a more broadly encompassing “one-stop-shop” for transportation-related services and resources in the community.

The Mobility Manager can also assist CBOs in promoting a unique aspect of the van sharing collaborative. For the first time, CBO partners can plan program collaborations that are enabled by new transportation collaboration. For example: a program participant may

The Mobility Manager will be the “community face” of the pilot, will be responsible for day-to-day service coordination, and will serve as the liaison between CBO partners and the vendor.

attend a YMCA program three days a week and attend another CBO with different program offerings the other two days. This encourages CBOs to collaborate programmatically and offers parents and youth new and more flexible choices.

The pilot project makes a significant investment in Mobility Management. It is important that the Mobility Manager be a member of the community and already be knowledgeable about, and engaged in, BVHP's neighborhoods, population groups, multi-cultural landscape, community agencies, and resources. Throughout the pilot project, the Mobility Manager's key community coordination functions may be supported by technical transportation specialists.

The pilot project's (and subsequent long term mobility program's) success rests heavily on the Mobility Manager's ability to effectively establish this program as a highly valued and visible community resource through ongoing education and marketing, through effective liaison between CBO partners and service providers, and through prudent program management.

Community Advisory Board

The community will be assured of local participation opportunities in all aspects of the shared van pilot through the development of a Community Advisory Board (CAB), which will oversee the pilot and any subsequent long-term mobility program. The primary responsibilities of a CAB will be establishment of overall service goals and project oversight and ownership.

The CAB will be responsible for setting policy, business practices, protocols, and priorities that reflect both the short and long-term goals and design criteria established at the outset of the project. The CAB will also have key management responsibilities such as designating/hiring a Mobility Manager and selecting the contract vendor. The CAB's role in building trust and credibility both among the project partners, and in the community at large, is fundamental to building community capacity from within Bayview Hunters Point.

The CAB will be comprised of representatives from diverse facets of the community, users of the services, and community advocates and other stakeholders with an interest or investment in the success of the project. The Transportation Working Group has already identified several constituencies to be represented on the CAB in addition to the core organizations who are sharing services. Potential CAB members could include representatives from:

- Senior service agencies
- Southeast Health Center
- Youth service agencies
- Churches
- Youth program participants
- Senior program participants
- Public schools
- San Francisco Housing Authority residents
- Local merchants association
- BVHP advocates

The CAB may also want to invite representatives from city agencies such as the Department of Public Health HEAL Zone and/or transportation planning agencies such as the Authority, to participate in an ex-officio (non-voting) role.

The Community Advisory Board will be comprised of representatives from diverse facets of the community, users of the services, and community advocates and other stakeholders with an interest or investment in the success of the project.

Fiscal Sponsor

The pilot project will utilize a Fiscal Sponsor to provide the requisite nonprofit 501c3 umbrella, necessary for accessing potential grant funding, and to provide an essential suite of professional “back office” services—accounting, legal, and risk management. The Fiscal Sponsor will perform two other fundamental functions. First, it will work closely with the Community Advisory Board to develop the appropriate structure and scope to ensure full community participation, transparency, and engagement. Second, the Fiscal Sponsor will provide legal and risk management expertise by developing contracts, agreements, and other documents, and will be the legal signatory for all documents.

Partnering with a Fiscal Sponsor leverages the experience these agencies have in managing community-based projects and also leverages the potential funding opportunities that are available to established nonprofit organizations. The Fiscal Sponsor can provide training and resources in nonprofit business management and work with the project managers to ensure the development of sound business practices. Partnering with a Fiscal Sponsor significantly enhances the project’s credibility with potential funders, by ensuring them that there is an “experienced hand” with a track record of managing grant funds overseeing the pilot project.

Contracted Transportation Service Provider

The overall consensus to use a “turn-key” vendor to provide van services for the pilot project was one of the most important decisions made by the Transportation Working Group. Too often, start-up transportation services are overly ambitious in assuming what they can accomplish by themselves and vastly underestimate the difficulty in providing reliable service with no experience.

A full-service contract with a reputable vendor allows the project to focus on building ridership and helping partners and their customers actually use the service, which is necessary for a successful start-up. It limits liability and insurance issues for each partner by providing a contractual arms-length relationship with a vendor who specializes in providing transportation services.

A vendor assures a driver and a vehicle will always be available for the service; vendors have back-up provisions for both. Having a full service contract provides reliable and guaranteed vital functions such as maintenance, required legal documentation, required driver qualifications and employment provisions such as random drug testing, and a host of other details required of transportation service providers to meet the proposed service model. Implementing service with a start-up vendor also provides flexibility to utilize different types and sizes of vehicles as the project evolves. A vendor with a fleet of vehicles can quickly respond to requests for larger vehicles, for instance, or provide special vehicles for a one-time special event at a pre-determined rate.

A single start-up vendor simplifies ongoing coordination and scheduling. A scheduling and reporting system that will be jointly managed by the vendor and Mobility Manager will be set up prior to the launch of service. It holds the vendor accountable for making sure service is available as scheduled, producing utilization and other reports.

The competencies of the CAB, the Mobility Manager, and partnering CBOs will increase throughout the pilot project. As these skills develop and services expand, opportunities for more local participation in the management and delivery of services may also increase. The CAB will make these determinations as community needs and its capabilities evolve.

Table 3-2: Preliminary Schedule for Sharing Van Service

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
7:30 AM						
8:00 AM	Medical	Medical	Medical	Medical	Medical	
8:30 AM						
9:00 AM	Shared Service	Shared Service	Shared Service	Shared Service	Shared Service	
9:30 AM						
10:00 AM						
10:30 AM						
11:00 AM		Shared Service	Shared Service	Shared Service	Shared Service	
11:30 AM	Pharmacy					
12:00 PM						
12:30 PM						
1:00 PM						
1:30 PM						
2:00 PM	Youth Shared	Youth Shared	Youth Shared	Youth Shared	Youth Shared	
2:30 PM						
3:00 PM						
3:30 PM						
4:00 PM						
4:30 PM	Youth Field				Youth Field	
5:00 PM						
5:30 PM						
6:00 PM						
6:30 PM						
7:00 PM	Youth	Youth Shared	Youth Shared	Youth Shared	Youth Shared	
7:30 PM						
8:00 PM						
8:30 PM		Evening Adult Program		Evening Adult Program		
9:00 PM						
9:30 PM						

AVAILABLE:

Initial Pilot Project Partners And Van Schedule

Based on the Transportation Working Group meetings and interviews with individual CBOs, the following potential founding “partners” for this new consortium could include:

- Southeast Health Center
- YMCA’s adult and youth services
- A. Philip Randolph Institute’s job access and youth programs
- George R. Davis Senior Center
- Black Coalition on AIDS
- City of Dreams youth programs

The above agencies have indicated a willingness to commit to a combination of shared and individual service for the pilot project. These organizations developed consensus for a preliminary weekday schedule based on each organization’s specific requests for service and an initial budget and cost allocation.

The Study Team calculated the total cost of providing this service (described in Chapter 4) and worked with each organization to help them understand the potential costs of participating in this service assuming that partner agencies are responsible for paying the entire cost of the contracted service. It is hoped that grant funding will be identified that can “buy down” the cost of this initial service and can make adding service more attractive to more partner agencies; under the “highest impact case” the entire cost for these services would be borne by partner organizations. This is further described in the following Chapter 4 on cost and funding.

The sample schedule on the previous page illustrates a preliminary schedule for shared van service.

Implementation Activities And Timeline

There are three critical next steps that will be needed to launch the pilot project:

- Establish a CAB: Define the members and their roles, and formalize roles through letters of intent/commitment
- Select Mobility Manager: This entity will serve as the project manager for the start-up and pilot periods
- Seek and acquire grant funding, including a grant for project start-up and a 12-18 month operating grant

These activities need to take place more or less in parallel. If the CAB is established first, this body can designate a grant writer and select a Mobility Manager. If the Mobility Manager is selected first, this person can aid in establishment of the CAB and move forward with the grant writing process. It is likely the CAB and Mobility Manager will need to be defined in some form before applying for grant funding because funders will want to know there is an entity that has clearly taken responsibility to feel confident about funding the project.

For now, achievement of these critical initial milestones will be the responsibility of TWG members, supported by the Authority and the HEAL Zone. During this period, the TWG, or a subset of TWG members, will continue to meet on an ad hoc basis in order keep the project moving forward; they will serve as the “bridge” between the current planning process and the implementation of the pilot overseen by the fully established CAB. During this

period, BMAGIC will take on a “convener” role to call meetings and keep the working group members engaged in making these critical decisions about the project.

Once these milestones have been met, the Study Team anticipates a six month period during which final organizational development will occur and project details will be finalized. The following table illustrates the key activities and work flow that will be necessary to get the pilot launched during this six-month start-up period.

Table 3-3: Key Start-Up Activities and Work Flow

ACTIVITY	MONTH					
	1	2	3	4	5	6
Organizational Development						
Finalize partners for pilot:						
• Determine “master” schedule	✓					
• Obtain letters of commitment from partners	✓					
Name Project		✓				
Apply to Fiscal Sponsor (upon receiving funding commitment)		✓	✓			
CAB to establish policies re: services, vendors, etc. (with input from Fiscal Sponsor)			✓	✓		
Establish organizational agreements, contracts with partners, Project Director (Mobility Manager), others (under direction of Fiscal Sponsor)				✓	✓	
Develop RFP for service provider; select vendor and finalize contract					✓	
Vendor training						✓
Develop protocols for customer service, reports, quality assurance, etc. (with vendor and Fiscal Sponsor)						✓
Marketing						
Community Engagement: make presentations to churches, schools, parent groups, and public housing meetings to build awareness				✓		
Develop website, educational, and marketing materials				✓		
Work with each partner to develop internal processes to take advantage of transportation potential				✓	✓	
Offer demonstration rides at specific agencies, destinations						✓
Participate in community events				✓	✓	✓



4

Pilot Project Costs and Funding Approach

Pilot Project Costing Approach

The main factors that will determine the cost of the pilot project are:

- Contractor rate and service quantity
- Mobility Manager budget
- Fiscal Sponsor overhead rate

CONTRACTOR COSTS

The hourly cost for the contractor will fluctuate based on how many hours the community can commit to “purchasing” (e.g. the more hours that can be guaranteed for the contractor, the lower cost the contractor can offer). Therefore, an initial service schedule was developed based on the level of service and type of participation each partner has indicated it wants and is willing to commit to (see prior chapter). This preliminary schedule allowed for estimation of a total number of contractor hours from which an estimated hourly cost and total contractor cost could be derived. For purposes of estimating the cost of this pilot, a total of 2,860 annual hours (based on 55 hours of service/week) was assumed at a rate of \$50-80/hour. These hours would be guaranteed to the contract operator in exchange for its guarantee that a functioning vehicle is available during the hours specified.

Ultimately the hourly cost for contracted service will be determined during the solicitation process to select a contractor. In the longer term, costs may be lower, especially in the post-pilot period once the van sharing program is well established and has been up and running for a period of time.

MOBILITY MANAGER COSTS

The number of hours for the mobility manager was estimated based on the anticipated work outlined in the prior chapter. The current estimated budget includes a range of hours and hourly rates for this person and can be further refined once the Mobility Manager is selected. This estimate, especially the high end estimate, assumes significant time spent on initial outreach, community engagement, and community capacity building that may not be necessary for a long term post-pilot operation.

FISCAL SPONSOR COSTS

Fiscal sponsor costs were developed based on interviews with several potential fiscal sponsors. Rates typically range from 9% to 15% of overall program cost. (Background information from potential fiscal sponsors is included in Appendix F.)

PILOT PROJECT BUDGET

The current budget includes a low and a high estimate for the Shared Van/Mobility Manager Pilot of approximately \$212,000 to \$346,600 per year. The breakdown of costs is outlined in Table 4-1 below. The long-term costs for this project beyond the pilot period may change based on soliciting a lower hourly cost from a contractor once the operation is more stable, or requiring fewer hours from the mobility manager.

Table 4-1: Annual Operations Budget for Shared Van/Mobility Manager Pilot

LINE ITEM	DESCRIPTION AND ASSUMPTIONS	LOW-COST ESTIMATE	HIGH-COST ESTIMATE	WHO
Shared Van Operations	Full service contract. Based on 55 hours of service/week at \$50-80/hour	\$143,000	\$228,800	Vendor
Mobility Manager	20-25 hours/week at \$20-30; 5-10 hours/week at \$30-40	\$28,600	\$59,800	Contract through existing Bayview resource
Fiscal Sponsor	9 to 15% of revenues (assumed 15%)	\$27,660	\$45,210	(e.g.: Tides, SF Study Center of SF Foundation Community Initiatives)
Other	Website and hosting, phone service, office supplies	\$5,000	\$5,000	
Technical Assistance	Ongoing liaison with Mobility Manager as needed at 1 hr/week	\$7,800	\$7,800	
TOTAL OPERATIONS BUDGET		\$212,060	\$346,610	

ONE-TIME START UP COSTS

To enable the launch of the pilot van sharing service, there will be one-time start-up costs, primarily consisting of additional hours for the Mobility Manager. These one-time start-up activities and costs are outlined in Table 4-2 (next page).

Funding Approach

Several agencies, including the core partners in this project, already devote significant financial, management, and administrative resources to transportation. These costs are already budgeted through existing program and other grant funds. The opportunity to leverage these existing funds, and for agencies to partner on soliciting joint and matching grants for this project, is a unique opportunity.

Ultimately, this project is designed with the potential to be self-sustaining, with CBOs paying for the service they use as part of an acknowledged line item within program budgets. Total costs for each agency were estimated according to how much service the agency is planning to use (based on the sample schedule described above). These represent a “highest

cost scenario” for each partner; these figures are the total financial commitment each partner would make if no other funding were available. Formalizing commitments of participation and funding (as applicable) is a critical next step for pilot project implementation. The team expects that, in the post-pilot period once the service is well established, project costs will be lower than those outlined here (as described in the costing section above).

It should be noted that, in some cases, the total investment by participating in this pilot will be similar to what a CBO currently spends providing its own dedicated service, yet the number of service hours and potential number of constituents served would increase.

Table 4-2: Start-Up Costs (6 months)

NOTE: The start-up budget includes significant amount of training for the Mobility Manager, which builds community capacity even prior to the launch of service.

ACTIVITY	EST. HOURS MOBILITY MANAGER AT \$30/HR	EST. HOURS TECHNICAL CONSULTANT AT \$150/HR
Liaison with Partners: Work with each partner to maximize how they will utilize their segment of service; assist in internal organization (5 hours at each partner; 6 partners)	30 hours	20 hours
Pre-Marketing (demonstration rides, special events to introduce service)	20 hours	10 hours
Liaison with Fiscal Sponsor to set up systems, procedures, protocols. Prepare and execute agreements with vendors and partners	10 hours	10 hours
Vendor Liaison: Prepare RFP, evaluate, interview, and selection.		
Review final schedules, destinations, routes		
Conduct test runs		
Establish protocols and operational procedures		
Configure reports		
Train drivers	30-35 hours	20 hours
Marketing:		
Name service, logo		
Develop website and marketing materials		
Pre-publicize to community through presentations, fliers, articles, etc.	12 to 15 hours	10 hours
Customer Service:		
Develop protocols, procedures, reports for monitoring all aspects of Customer Service (inquiries, referrals, complaints, utilization, etc.)	6 to 10 hours	6 hours
Ongoing Technical Support (10 hours/ month for 6 months)		60 hours
Financial Technical Support (20 hours) to assist CAB in setting membership dues, fees, policies		20 hours
TOTAL HOURS	128 to 140	156
TOTAL COST	\$3,840 to \$4,200	\$22,900

For this pilot project, the community plans to apply for grant funding in order to help overcome initial implementation hurdles and allow participation by a wider range of organizations that do not now have budgets set aside for providing transportation services. For CBOs without a transportation budget currently, the initial organizational-level cost estimation provides a realistic budgetary line item for transportation that can be incorporated in future grant-writing and program funding cycles. Having a mechanism for budgeting transportation to support programs will help assure ongoing sustainability post-pilot. The demonstration of improved program outcomes, cost savings, and other benefits achieved through the shared van service pilot will support acquiring and/or budgeting for transportation in the future.

In post-pilot years, annual budgets will be based on actual commitments made by the project partners and any external fund sources.

POTENTIAL FUNDING SOURCES

There is a large array of potential funding sources that can be sought for both the short-term pilot and the longer-term project. Because this project takes such an efficient approach to addressing mobility barriers in BVHP by working through an experienced contractor and through existing agencies, public housing site representatives, and other community institutions, we believe that acquiring grant funding is a realistic possibility for both start-up and long-term operations.

The project's objectives align with common goals of many public and private funding sources. These include:

- Public agencies and CBOs collaborating to provide more comprehensive services
- Reducing duplication of similar efforts
- Increasing overall utilization of resources and efficiencies
- Reducing overall and individual agency costs over current expenditure levels
- Increasing accountability and transparency
- Expanding reach and access for customer base
- Building community capacity within individual partner agencies

Some 80 federal programs provide transportation services or funding for transportation services to an array of state, regional and local grantees. A list of federal agencies is provided in Appendix E.

Several other private foundations and grants currently fund transportation programs and service for our Bayview project partners or for other community agencies throughout the Bay Area, which further expands the data base of potential funders.

Other potential funding sources include medical providers (hospitals, dialysis, cancer, and other specialty programs) who serve large numbers of residents in the community; businesses who are seeking to broaden community engagement, particularly to support health and wellness; and other types of destinations that may benefit from the project's services.

The funding strategies identified for the pilot project include:

- Seek grant funding for the start-up and 12 months of pilot operations and management
- Seek smaller grants and donations specifically for vehicle acquisition, fuel, maintenance, insurance, and other fixed costs from banks or local businesses (potentially acknowledging sponsorship on the project's vehicles, on its website, and in Other ways) to help defray costs for CBO partners during the pilot

There is a large array of potential funding sources that can be sought for both the short-term pilot and the longer-term project.

- Seek funding for specific blocks of service
- Seek funding for specific types of service (e.g., dedicated funding source to support medical trips for chronic disease management or access to food pantries)

Further development of grant funding opportunities is one of the primary next steps in pilot project implementation.

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Performance Measurement and Evaluation

The UCSF Clinical & Translational Science Institute's Community Engagement and Health Policy Program has been an active participant in the Transportation Working Group that has guided the design of the pilot project. UCSF is also part of the Bayview HEAL Zone's efforts, which have included linking transportation availability and usability with improved access to physical activity and nutrition.

UCSF has generously offered to assist in the development of program evaluation design for the pilot. Evaluation criteria will include both transportation-specific metrics and overall health and wellness targets associated with enhanced access to services.

Potential evaluation measures for the pilot project relate to the original goals and program design principles established by the Transportation Working Group at the outset of this effort. They include:

- Increasing access for BVHP residents to an array of health and wellness services
- Improving operating efficiencies in the delivery of transportation services throughout the community
- Building capacity within the BVHP community to effectively manage local transportation programs and services
- Long-term sustainability (evidenced by the willingness of CBO partners to continue to fund the post-pilot project)
- Safety for users of the service
- Community inclusion and ownership
- Cultural sensitivity
- Environmental responsibility

Potential evaluation metrics include:

- Utilization rate for shared vehicle(s)
- Number of partner organizations
- Number of customers served across multiple programs and organizations
- Number of trips and specific destinations served that meet programs' goals, such as a Farmers Market
- Cost per partner/trip/customer

- Customer satisfaction with service and perceptions
- Attendance in programs and/or at school as a result of transportation service
- Reduction in no-show rates for medical appointments
- Increased rates of filling prescriptions
- Decreased emergency room visits

Some of the above evaluative measures are easily measured by straightforward metrics, such as the utilization rate for shared vehicles, number of customers served, trips provided, and costs. Others are more complex and qualitative. Further refinement of these will require thoughtful conversations with multiple CBOs about not only what is measured, but how, when, and why. In doing so, the pilot and project have the opportunity to contribute further to the growing body of research that underscores the important role transportation plays in building healthy communities.



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Long-term Program Opportunities

Long-Term Mobility Management

In addition to promoting and coordinating the initial pilot project and services, in the long term the Mobility Manager can become a primary resource for other important transportation-related services in the community. Examples might include assisting residents with the application process for paratransit service, serving as a liaison with the SFMTA paratransit office, accompanying new users on their first transit trips, and providing the convenience of a “one stop shop” for any questions or problems in using those services.

Developing a team of “ambassadors” – residents who will ride public and private transit systems with residents who may need assistance – could also become a local hiring or internship opportunity.

Volunteer Driver Program

Volunteer driver programs rely on individual drivers using their own vehicles to provide rides to other individuals or small groups. They are simple to implement and manage, and have low ongoing costs. Some programs reimburse volunteer drivers with cash stipends for the cost of gas; others use gift cards as an incentive; still others allow volunteer drivers to “bank” hours for future trips they may need. Some programs coordinate rides between individual riders and volunteer drivers through a central office (i.e., a call center); others let riders and drivers arrange rides directly.

A volunteer driver program is a potential future phase envisioned for the BVHP community as part of an expanded mobility program. A volunteer driver program in BVHP would target the Hunters View and Alice Griffith housing sites initially, facilitating “high cost/low volume” trips by individuals who need to get to destinations beyond the parameters of other programs or at times outside of normal operating hours, or who fall short of qualifying for paratransit service but face challenges in making certain trips independently.

This program will be based on the Beverly Foundation’s³ longstanding and successful templates for volunteer driving programs in use around

³ Beverly Foundation is a nonprofit organization focusing on mobility and transportation affecting older adults. Its mission is to foster new ideas and options to enhance mobility and transportation for today’s and tomorrow’s older adults.

the country for the past two decades. Key ingredients of success include: programs are low cost, easy to administer and track, and easy for customers and drivers to register and use; they empower customers, are worthwhile for the volunteer driver, offer flexible times and destinations, and use trusted existing resources.

The biggest challenge for most volunteer driver programs is that demand outpaces the availability of drivers. Well-managed programs have excellent safety records and experience few problems obtaining reasonable insurance.

A volunteer driver program within Bayview Hunters Point could have the following elements:

- As Hunters View and Alice Griffith are rebuilt, each site will be staffed with community “connectors” whose job it is to work directly with residents. The Mobility Manager would work with staff at each site to recruit a pool of volunteer drivers and riders and market the program.
- Volunteer drivers must furnish a clean driving record, a current driver’s license, and proof of insurance. Before being approved as a driver in the program, applicants undergo a basic training program and must be deemed insurable by the project’s insurance carrier. This information is maintained in a central database by the Mobility Manager, along with contact information for the volunteer driver.
- Potential riders may contact the volunteer driver directly to request a trip. Trips are scheduled at their mutual convenience (not just during regular business hours). After the trip, the Mobility Manager confirms with the rider that the trip was made satisfactorily and authorizes reimbursement to the volunteer. Reimbursement is normally the current IRS rate allowed for mileage plus any parking or tolls incurred. Reimbursement provides an incentive for the volunteer driver to take his or her neighbor to the grocery store, or to a doctor’s appointment across town. It also empowers the rider to “ask” for the ride by being able to offer pay for the driver’s expenses.
- Program costs are: ongoing costs involve database maintenance, marketing, volunteer reimbursements, and a basic insurance policy. The Beverly Foundation has readymade templates for all aspects of this program, which further simplifies and expedites start-up as well as ongoing management.

This volunteer driver template can easily be applied to other locations in the future. Volunteers can be recruited from other sources such as nearby churches (who may want to ‘adopt’ certain blocks or areas). This program can be used to help residents access the weekly Food Pantries in BVHP cost-effectively —or it can deliver food from the pantries to shut-ins. It is a cost-effective way to provide trips to medical facilities across town which may otherwise take two or three transfers and a long time on public transit. Volunteer driver programs can also effectively serve special “niches” such as veterans driving veterans to the VA and other destinations, where there are specific commonalities, shared interests, and commitments.

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