

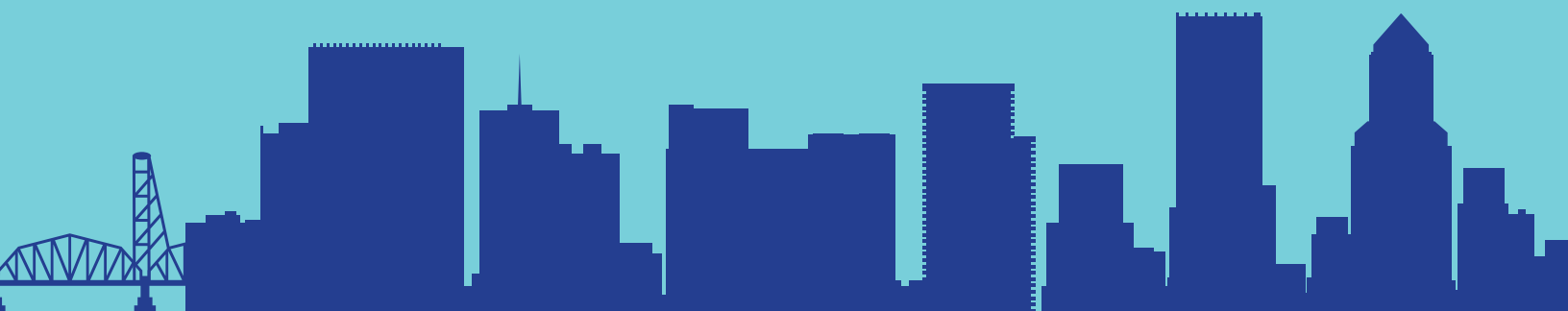


SHARED-USE  
MOBILITY CENTER

# GROWTH & IMPACT

R E P O R T

2017-2019





**Shared Mobility is a powerful tool that can help reduce transportation costs, lessen climate change impacts, and expand access to jobs and opportunity.**





# Dear friends,

The explosion of new mobility modes and innovations is truly exciting, in large part because mobility is so central to our quality of life. Yet, we still face fundamental problems—lack of job access, congestion in our cities, transit deserts, and the high cost of simply getting around.

The Shared-Use Mobility Center (SUMC) matches up this innovation and excitement with meaningful mobility for all. We have expanded our footprint since our humble beginnings five years ago and are working closely with cities, suburbs, and rural communities across the country. We have offices in Chicago and Los Angeles and have grown to a staff of 20 people researching, advising, testing, and problem solving for how we can truly make it possible to live well without having to rely on a car. Our accomplishments are many.

- Over the coming years, SUMC will serve as the co-manager of the California Air Resources Board's Clean Mobility Options program, directing \$17 million to shared and electric pilot projects in low-income communities around the state.
- Together with the Federal Transit Administration and others, we've embarked on more than 30 shared mobility pilot projects as a funded partner; working closely with agencies to find, plan and execute new mobility on demand (MOD) solutions —and now we are seeing the results and learning what can be scaled up.
- We share knowledge about shared mobility through the MOD Learning Center, a self-guided learning experience that has become a critical resource for transportation practitioners of all levels.
- Through our many applied projects, we contribute to the broader understanding of the shared mobility landscape, drawing out operational lessons, impacts, and best practices.
- And every year, our National Shared Mobility Summit has become the place to go, keep up with the industry, meet partners, and form new collaborations. We have created a learning and doing community.

Many of these partnerships are beginning to bear fruit in improving mobility, but there is much to be done. How can we get ahead on land-use issues? How do we reduce transportation impacts to climate change while keeping it affordable? More importantly, how do we expand shared mobility in the communities that need it most, truly making transportation an engine of economic development?

As we enter our sixth year, we have a fabulous and dynamic staff, terrific funders at FTA, Transportation Research Board, California Air Resources Board, Hewlett Foundation, McKnight Foundation, Toyota, and many others helping us to search for the answers to these important issues. Together, we look forward to continuing on the path to mobility for all.

Join with us.

Sincerely,

**Sharon Feigon**

Executive Director, Shared-Use Mobility Center



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\*This report covers SUMC's 2017, 2018 and 2019 fiscal years, which begin on July 1st and end on June 30th of each respective year.





# Our Mission

The Shared-Use Mobility Center is a public-interest organization dedicated to achieving equitable, affordable, and environmentally sound mobility across the US through the efficient sharing of transportation assets. By connecting the public and private sectors, piloting programs, conducting new research, and providing policy and technical expertise to cities and regions, SUMC seeks to extend the benefits of shared mobility for all.



# Our Vision

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***The vision of the Shared-Use Mobility Center is to create a world where universal mobility enables everyone to live well without having to own a car.***

We are working to shift America from auto-dependency to mobility choice, from restrictions to options, from vehicle emissions that negatively impact our world to a multimodal network that's affordable, equitable, and environmentally sound.

This network of choices will be shaped by the principle that mobility is a right not limited by income or ability. We are working to make transit a robust mobility backbone, complemented by modes such as autonomous shuttles, micromobility, shared ridehailing, and active transportation.

Transforming an industry, however, takes a shift from project thinking to network thinking—not only opening up more options, but also creating links between them. Integration is vital if we are to create a viable alternative to privately owned, single-occupancy vehicles, promote economic opportunity, and reduce transportation-induced CO2 emissions—the #1 cause of climate change today.

The current transportation model threatens health, opportunity and quality of life in ways that are unique to each region.



Cities fight with congestion, high commute times, lack of equal opportunity and job access, yet have the ability to be truly multimodal.



Suburbs can isolate older adults and those who can't afford transportation and lack the land use to support active modes like walking and biking.



Rural areas face an older population and widespread economic decline. Functionally, having a car is often a necessity as not everyone can or chooses not to drive. Shared mobility adds choices and enhances the quality of life.

We can't fight these challenges with theory. We need good transportation policy and incentives to motivate cities, companies, and people. Our job at SUMC is to work together with communities, businesses, agencies, and governments to transform these roadblocks into mobility for all. That is where we are going. That's what we are doing now.



# Our Story

The Shared-Use Mobility Center (SUMC) was founded in 2014 by a small group of mobility pioneers. Led by Sharon Feigon with participation by Susan Shaheen, David Bragdon, and Scott Bernstein, SUMC envisioned its role as a clearinghouse of information about the emerging industry and a testing ground for new strategies and ideas.

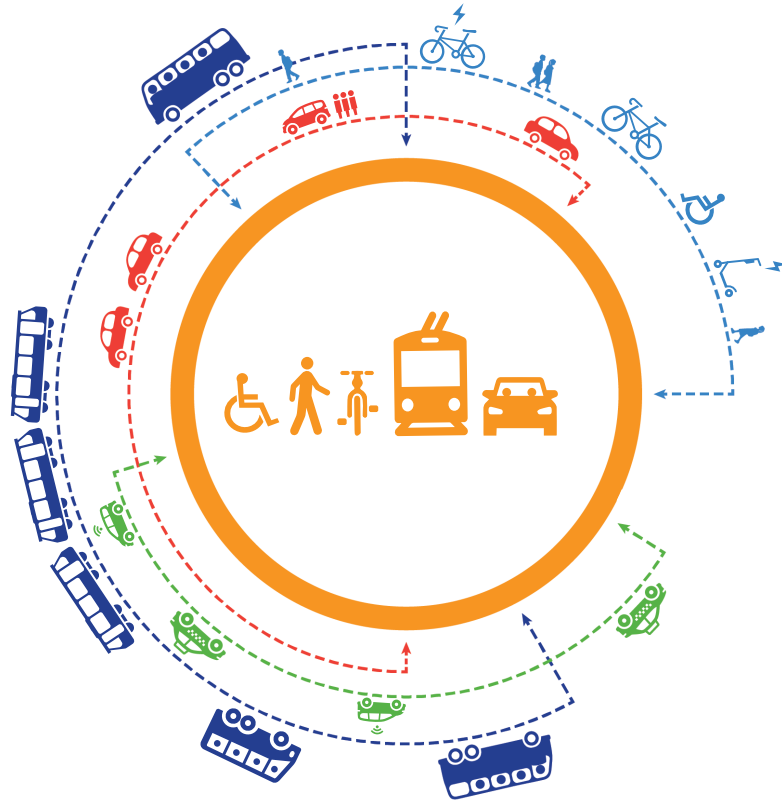
SUMC has successfully followed its early business plan and grown from an initial \$600,000 investment to a budget in the coming fiscal year of \$3.29 million. The first funding came from the sale of IGO CarSharing, the social venture that Sharon Feigon headed at the Center for Neighborhood Technology. IGO first brought carsharing to the Chicago region and led the industry in many innovations.

As a 501(c)(3) nonprofit, public interest organization, SUMC continues IGO's mission by working to make it possible for everyone to live well without owning a car.





# Creating a Multimodal Transportation System that Works for All



**Public Transit**



**Microtransit/  
Shuttles**



**Carpooling/  
Vanpooling**



**Carsharing**



**Bikesharing**



**Scooter-sharing**



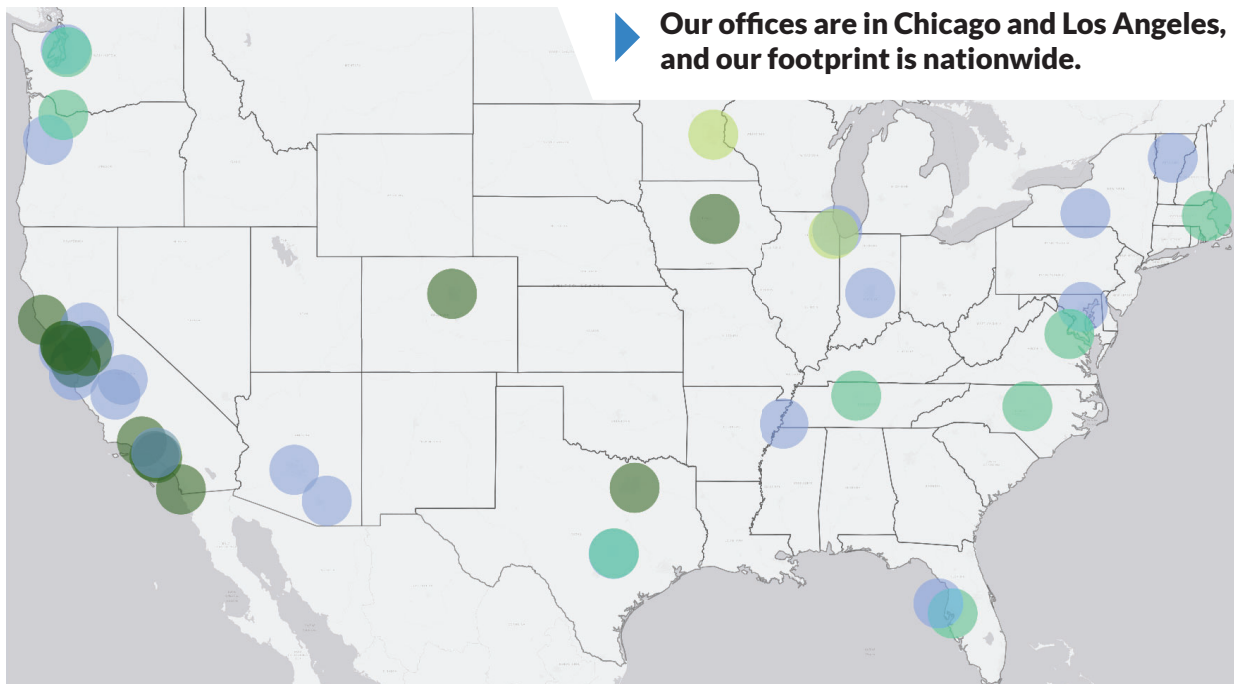
**Ridehailing/  
Ridesourcing**

# Our Work

Our work is as multi-faceted as shared mobility itself, constantly evolving with new technologies, partnerships, and changes in the mobility landscape.

Our scope of work can be aligned into five areas: strategic initiatives, technical expertise, research (knowledge creation), learning (knowledge sharing), and partnership facilitation between governments, public agencies, nonprofits, communities, and the private sector.

In everything we do, we draw on the extensive knowledge of our staff to provide advice and expertise to cities, towns, and regions throughout the nation.



“SUMC is developing and changing policy across the country to promote mobility for all and protect the planet. Currently, shared mobility policy is predominantly localized. We are pulling out best practices that work on the ground to impact policy at the national level.”

**Ellen Partridge**  
Policy and Strategy Director





## Strategic Initiatives

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Drawing on original research, statistical modeling, and decades of experience in shared mobility operations across the country, SUMC works with cities and transit agencies to develop strategic plans that chart a path forward toward a more sustainable future.

### Building a national movement around clean mobility for all

In 2019, SUMC became co-administrator of the California Air Resources Board's Clean Mobility Options program, directing \$17 million to shared and electric pilot projects in low-income communities statewide over the next two years. The program will help move California further towards its emission-reduction goals while increasing access to jobs, resources, and overall quality of life. Through this program, SUMC is implementing climate change strategies and solutions that may then be used by other communities across the country.

# Accelerating electrification through shared mobility

## Shared + Electric Mobility Initiative

Widespread electrification of the American transportation sector is crucial if we are to meet fundamental decarbonization goals. Through our partnership with the William and Flora Hewlett Foundation, SUMC is scaling knowledge about and use of electric vehicle (EV) shared mobility services that increase access to affordable, clean transportation options for all. We are sharing best practices through pilot case studies, practitioner outreach, needs assessment, communication plans, and stakeholder workshops.

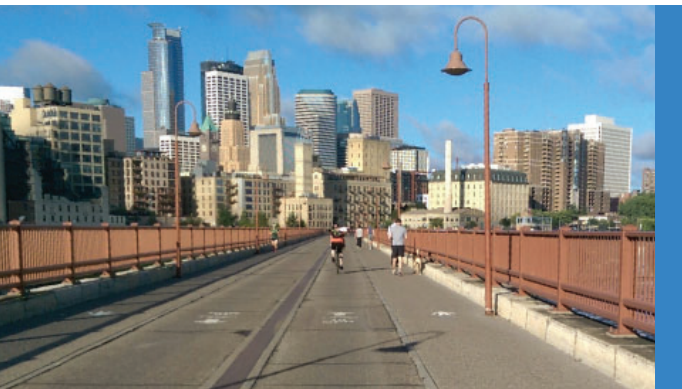
## Mobility Hubs in Affordable Housing Pilot

In partnership with the Metropolitan Transportation Commission and TransForm, SUMC is a key partner in this California Air Resources Board-funded project centered on the design and deployment of mobility hubs built around EV carsharing, EV charging, and other shared mobility services at affordable housing sites in the Bay Area.

## BlueLA EV Carshare

In April 2019, SUMC and the City of Los Angeles celebrated the one-year anniversary of BlueLA EV Carshare, a first-of-its-kind pilot program we helped create and guide that reduces greenhouse gas emissions and increases mobility choices in disadvantaged communities in and around Central Los Angeles. Since the launch on April 20, 2018 through June 30, 2019, it is

estimated that the BlueLA service (90 vehicles, 135 EVSE or chargers, and 27 stations) has reduced annual GHG emissions by 889.71 metric tons, which is equivalent to 972,654 pounds of coal burned or 100,114 gallons of gasoline consumed.



## Green Raiteros Rural Electric Vehicle Rideshare

This “Indigenous Uber” program uses a shared fleet of electric vehicles and volunteer drivers or “raiteros” to connect the predominantly Latino and farming city of Huron, California to vital services in Fresno. Developed by the Latino Environmental

Advancement & Policy Institute in partnership with SUMC, Green Raiteros is a progressive step toward transportation justice, and economic opportunity.

# Planning for better healthcare and transit access

## Southwestern Medical District Mobility Options

At the invitation of the District, and with funding from a grant from the Toyota Social Innovation Team, SUMC conducted a survey and is working with partners to enhance mobility by developing a plan aimed at improving intra-district movement and commuting to the district through transportation demand management options, and by exploring potential use of automated shuttles.



# Convening leaders, strategies and solutions

## **Twin Cities Shared Mobility Collaborative**

In partnership with the McKnight Foundation, SUMC developed the Shared Mobility Action Plan in 2017. Since then, we have nurtured a collaborative group of transportation leaders, public agencies, private companies, city officials, and nonprofits in efforts to implement the Plan's recommendations for improving regional mobility in Minneapolis and Saint Paul, Minnesota.

### **The Collaborative's efforts have resulted in:**

- a.** Passing a comprehensive plan in Minneapolis supporting a multimodal network.
- b.** Planning for mobility hubs in Minneapolis and Saint Paul.
- c.** Changing regional policy to make it easier for people to take vanpools to jobs downtown.
- d.** Expanding EV carshare with MPO funding, with possible extension to future projects.
- e.** Pioneering new models for gathering, analyzing, and using shared mobility data.
- f.** Adding new staffing at the City and MPO levels to address shared mobility.



## Innovation with breadth and scope

### **Bay Area Carsharing Implementation Strategy**

SUMC teamed with UrbanTrans to produce a carshare implementation strategy for the Metropolitan Transportation Commission (MTC) to grow carsharing use, reduce solo driving and vehicle miles traveled, and meet CO2 emission-reduction targets in the Bay Area.

Using our proprietary Opportunity Analysis tool, SUMC identified carshare opportunities and recommended the creation of a “one-stop shop” as a clearinghouse for education and policy assistance efforts around carshare expansion. The project resulted in MTC's allocation of \$1.2 million to implement the recommended strategies.

### **Denver Regional Transportation District (RTD) First and Last Mile Strategic Plan**

SUMC worked with UrbanTrans and RTD to expand transit coverage as well as develop evaluation tools, recommendations, and implementation strategies to improve mobility and take advantage of the expanding fixed-rail system.

### **Identifying New Mobility Options**

SUMC and Nelson\Nygaard worked with the Tri-Metropolitan Transportation District of Portland, Oregon to identify partnerships, policies and technologies to expand mobility options and provide cutting-edge tools to assess the quality and equity implications of new services.

# Technical Expertise from Idea to Implementation

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We bring decades of experience and a hands-on approach.

SUMC provides guidance to cities and transportation leaders across the US to test and scale new shared mobility concepts, maintain and monitor operations, measure impacts, and share best practices.

## **Mobility-on-Demand (MOD) Innovation and Knowledge Accelerator**

SUMC is proud to lead the Innovation and Knowledge Accelerator (IKA), supporting the FTA MOD Sandbox program, to help transit agencies that are exploring new “mobility on-demand” solutions in paratransit, multimodal trip planning, fare integration, first/last mile solutions, and more. Through the IKA, SUMC gives forward-looking transit agencies from urban, suburban, and rural areas the tools to exchange ideas, discuss lessons learned, and share knowledge with the broader industry by holding workshops, writing white papers, and conducting webinars throughout the year. Our events and products have reached over 100,000 in the public and private mobility spheres.

Our technical assistance for FTA will continue as part of its Integrated Mobility Innovation program, which is funding transit-led pilot projects featuring on-demand services, payment integration, and automated vehicles.

## **MOD On-Ramp: Creating pilot plans for successful implementation**

The MOD On-Ramp program is a partnership between SUMC and the FTA providing technical assistance to six transit agencies developing innovative MOD pilot projects. The selected participants receive support to conduct workshops in their communities and set parameters for projects; collaborate and share learning with peer agencies and experts; use research and analysis from SUMC; identify resources to meet challenges; and develop feasible MOD business plans.

As with the Innovation and Knowledge Accelerator, On-Ramp builds a shared knowledge base that accelerates learning on issues that affect the implementation of MOD projects, and develops resources for use by the wider MOD field.



“As mission-driven conveners and thinkers in the mobility domain, SUMC fosters , productive conversations among practitioners, innovators, researchers, and leaders around the technical and cultural issues at the core of implementing successful MOD projects.”

**Prashanth Gururaja,**  
MOD Program Director







# Providing Access for All

We focus on areas which are disproportionately affected by lack of affordable, accessible transportation and by the effects of climate change, as shown in the following case studies.



## Focus Area: People with Disabilities

### National Mobility Access for All

Mobility is not a privilege, it is a right—regardless of age, ability or income. We are proud to work with the National Center for Mobility Management, a cooperative funded by the US Department of Transportation, in efforts to identify and implement policies and practices that more fully consider the needs of riders with disabilities and older adults in MOD and shared-use mobility services.

**Considerations for TNC Partnerships to Serve Seniors and Users with Disabilities** - This brief for public agency stakeholders considering public-private shared mobility partnerships provides a framework—using best practices and lessons learned—for ensuring that new partnerships include the needs of riders with disabilities and seniors.



## Focus Area: Lower-Density Areas

### Vamos Mobility

SUMC provided strategic assistance for the Valley Flex/Valley Go project, an ecosystem of new mobility options being developed in San Joaquin valley. This project enables customers with a smartphone to use the Vamos Mobility app or a call center to plan trips within and between San Joaquin and Stanislaus counties, including trips across multiple agencies and services. Vamos Mobility covers both fixed-route transit trips and connections to dial-a-ride services.





## Focus Area: Disadvantaged Communities

### Memphis Area Transit Authority (MATA)

SUMC is providing technical assistance to the MATA with the development of an on-demand, flexible microtransit service in a low-density area. The pilot project seeks to improve transit connections and expand access to local destinations for residents of a low-income community.

### EVgo Equal Access Charging Hubs (EACH)

SUMC is supporting electric vehicle charging provider EVgo's EACH program by evaluating eight DC fast-charge hubs in seven pollution-burdened, disadvantaged communities in Los Angeles, the Bay Area, and San Diego, California.



## Focus Area: Job Access

### Maryland Department of Transportation (MDT)

The Baltimore region has been experiencing central-city job loss and suburban job growth, resulting in high unemployment and poverty among city residents. SUMC is working with the MDOT MTA in the creation of a microtransit pilot supporting transit improvements to provide urban workers efficient access to suburban job opportunities.

# Creating Knowledge with Research

Understanding and analyzing the impacts of new mobility is key to funding solutions that work.

SUMC produces original research for the Federal Transit and Federal Highway Administrations, the Transportation Research Board, and a number of public, private, and nonprofit clients. This contributes to the broader understanding of the shared mobility landscape.

## Notable Research



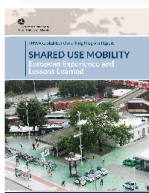
### **2019 White Paper: Objective-Driven Data Sharing for Transit Agencies in Mobility Partnerships**

Drawing on lessons from the FTA MOD Sandbox program and beyond, this paper guides transit agencies in addressing challenges with data sharing between private and public partners in MOD solutions.



### **2019 Case Study: When Uber Replaces the Bus—Learning from the Pinellas Suncoast Transit Authority's "Direct Connect" Pilot**

Direct Connect was the first partnership between a transit agency and a transportation network company to publicly subsidize rides by a private ridehailing service. We analyzed the pilot and subsequent developments, drawing out key lessons learned.



### **2018 FHWA Global Benchmarking Program Report: Shared Use Mobility—European Experience and Lessons Learned**

This report studies how European cities have successfully planned, implemented, and supported shared mobility services, featuring principal findings and recommendations for adapting practices in the US.



### **2017 TCRP Report 196: Private Transit: Existing Services and Emerging Directions**

After an analysis of private transportation services in the US, public agencies are shown ways to account for, regulate, and incorporate private transit into their planning.



### **2018 TCRP Report 195: Broadening Understanding of the Interplay Among Public Transit, Shared Mobility, and Personal Automobiles**

In one of the first uses of origin-destination trip data provided by a major TNC, SUMC compared trip times for TNCs with those for public transit, which laid the groundwork for future partnerships.



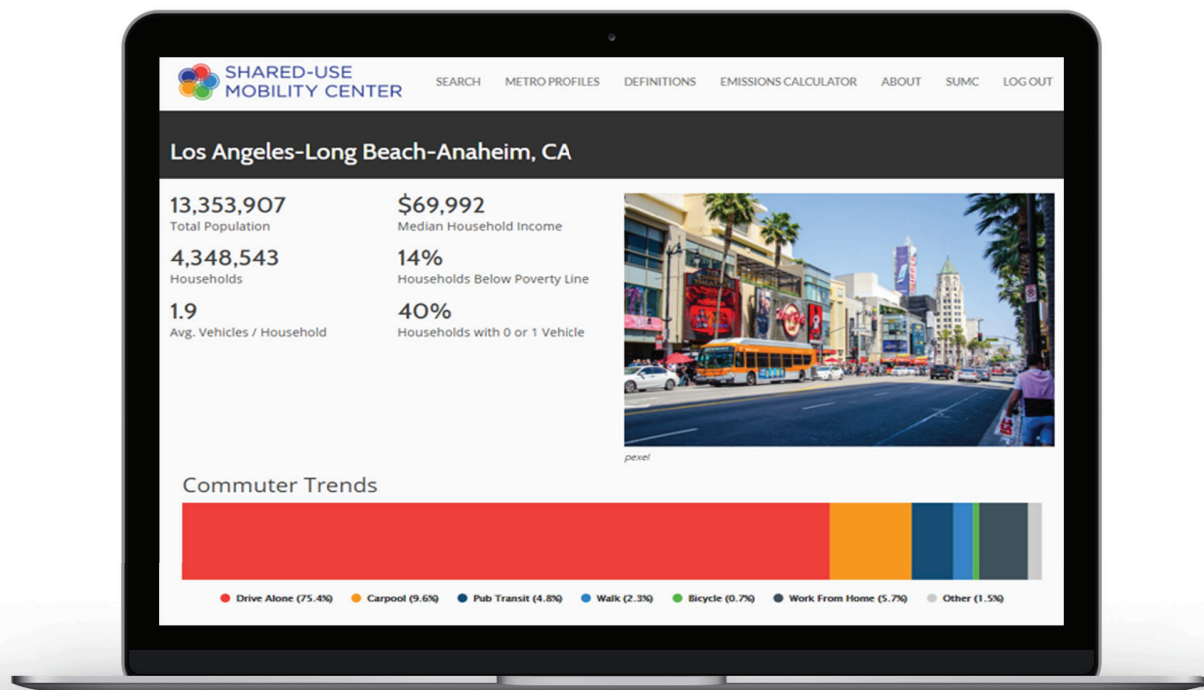
# Sharing Knowledge about Shared Mobility

## The MOD Learning Center

A multimodal transportation system for all cannot exist without sharing mobility knowledge in a way that's readily available and easily accessible. This truth inspired the creation of the MOD Learning Center, the first self-contained, self-guided learning experience about shared mobility for novices and experienced practitioners alike.

It is a place to be inspired with possibilities, to focus on a specific topic, or zero in on a location with our map interface; a clearinghouse of information where you can learn, contribute to, and share as well as a strategic asset that calculates, profiles and defines.

- Learning Modules bring together resources and offer a curated approach on a particular topic or mode.
- Case Studies dive into a particular topic or program's details, key findings, and best practices.
- Metro Profiles provide a snapshot of the socio-economic characteristics of a metropolitan area and outline the current state of its shared mobility.
- Brief Overviews outline specific policies and projects.
- The Emissions Calculator lets you determine the changes needed to reach a specific goal and see the results of your progress.



# Growing the Shared Mobility Community

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One of the most important things we do is bring people together.

A multi-modal transportation system can only function successfully with the support of all parties in the area it serves. SUMC brings together a diverse array of stakeholders – including government agencies, private operators and community groups – to generate new solutions, foster collaboration and advance the public interest.

We facilitate collaboration through regular workshops, open houses, receptions, media communications, and through the National Shared Mobility Summit, shown in the following examples.



## Facilitating Partnerships

### *Annual Transportation Research Board Receptions*

This sold out receptions for TRB brings together leaders, researchers, and innovators from the public and private sectors to network and hear featured presentations on our work.



## Discussing Solutions

### *MOD Sandbox Innovation & Knowledge Accelerator Workshops*

Held twice yearly, these workshops give a selected group of participants first-hand demos of innovative trip-planning apps and the chance to meet MOD Sandbox grantees.



## Community Building

### *SUMC Open Houses*

SUMC open houses are a chance to meet SUMC staff, hear presentations about current topics, and network with the shared mobility community. They are held quarterly.



## Media

For the last four years, SUMC's weekly newsletter, the Mobility Hub, has shared cutting-edge news about shared mobility, public transit, technology, and urban sustainability. With recent additions including featured content and relevant RFPs/RFIs, it is the leading news source in the industry with a global audience.



# National Shared Mobility Summits

Since 2014, mobility practitioners from around the world—including over 700 policymakers, public and private sector leaders, agency heads, innovators, and researchers—have gathered at the National Shared Mobility Summit, the leading mobility conference of its kind in North America. What sets our Summit apart is the focus on innovation and on implementation.

Over three days, audiences, panelists, and speakers take part in inspiring keynote speeches, in-depth panel discussions, interactive workshops, breakout sessions, hands-on demonstrations, networking opportunities, and two exclusive events: the Startup Spotlight and the Shared Mobility Expo. The Shared Mobility Summit is where innovations are sparked, tough questions are discussed, partnerships are made, and breakthrough solutions are found. We can't wait to take this even further with our 2020 Summit on March 17 – 19th in Chicago.



**“Radical principle:  
treat people walking  
the same way we do  
people driving.”**

**Stephani Pollack**  
Secretary & CEO, Massachusetts  
Department of Transportation



**“The design of freeways  
and communities creates  
barriers to opportunity.  
We’re focused on  
transportation for all  
that works for all.”**

**Anita Cozart**  
Senior Director, PolicyLink



**“And at the end of the  
day, public policy can be  
more innovative than  
private companies.”**

**Joshua Schank**  
Chief Innovation Officer, LA Metro



# Our Funders

SUMC would like to thank our funders for their continued support.

## Foundations

- The William and Flora Hewlett Foundation
- The McKnight Foundation
- TransitCenter
- Ulupono Initiative

## Government Agencies

- California Air Resources Board
- Federal Highway Administration
- Federal Transit Administration
- New York State Energy Research and Development Authority
- Transportation Research Board

## Networks

- Global Philanthropy Partnership
- SUMC Trade Ally Program

## Trade Allies and Sponsors

The Shared-Use Mobility Center Trade Ally program provides organizations with an opportunity to support SUMC's mission and the shared mobility industry.

- |              |             |
|--------------|-------------|
| • Arity*     | • Remix*    |
| • Assurant   | • Ridecell  |
| • Bosch      | • Spin      |
| • Cityway    | • Toyota*   |
| • Concox     | • Transdev* |
| • Ford*      | • Transit   |
| • Free2Move  | • Transloc  |
| • Genze      | • Trip Shot |
| • Goin       | • Uber/Jump |
| • Gotcha     | • Veoride   |
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| • Lyft       | • WSP       |
| • MunichRe*  | • Zipcar    |
| • Polsinelli |             |
| • Populus    |             |

\*Trade Allies

## Statement of Independence

All of SUMC's research, positions, governance, programming, and products are the independent and exclusive work of SUMC. A financial relationship does not include rights to influence or direct SUMC's research agenda, organizational strategy, operational procedures or mission.

## Board of Directors

### Clayton Lane, Board Chair

Mobility Specialist, WhereIsMyTransport

### Scott Bernstein, Board Treasurer

President and Co-Founder, Center for Neighborhood Technology

### Sharon Feigon

Executive Director, Shared-Use Mobility Center

### Mariia Zimmerman, Board Secretary

Principal and Founder, MZ Strategies, LLC

### Anita Cozart

Senior Director, PolicyLink

### Robert Puentes

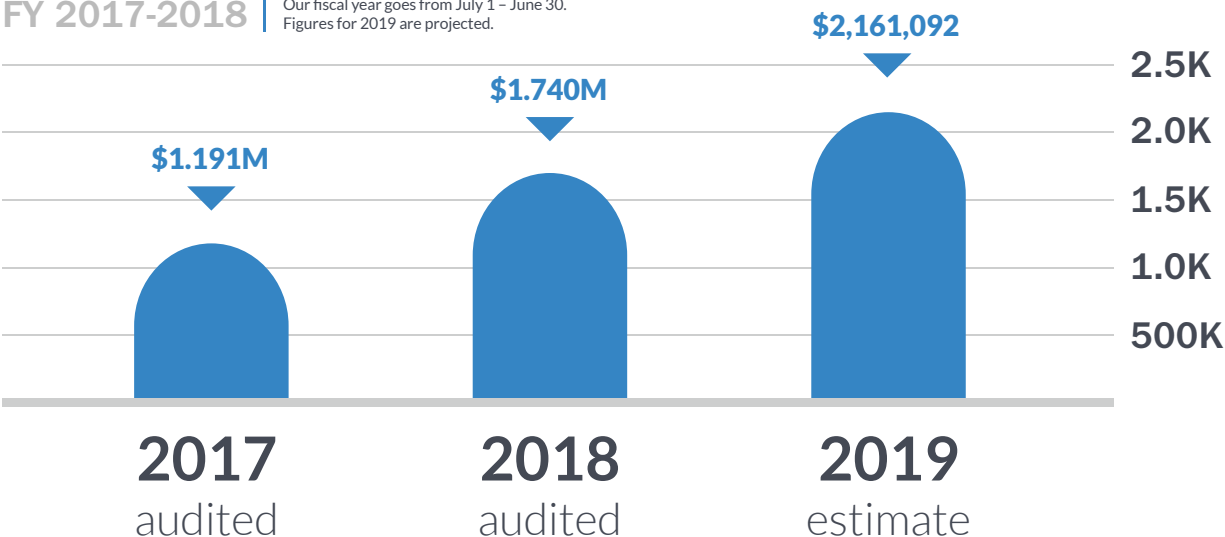
President and CEO, Eno Center for Transportation

SUMC has experienced steady growth over the three-year period covered in this report. Each year, on average, approximately 78% of our expenses are dedicated to program work, with 13% for administration and 9% for fundraising. In fiscal year 2020, we will be extending this growth pattern. The budget for 2020 is \$3.29 million.

## Total Support & Revenue

FY 2017-2018

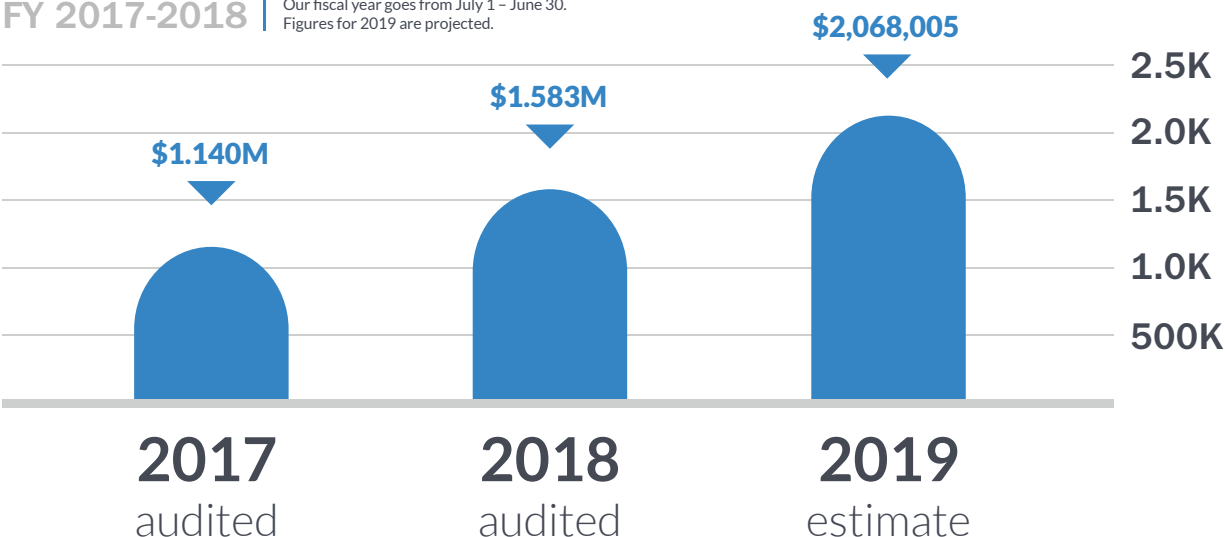
Our fiscal year goes from July 1 – June 30.  
Figures for 2019 are projected.



## Total Expenses

FY 2017-2018

Our fiscal year goes from July 1 – June 30.  
Figures for 2019 are projected.





# Our Team

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**Sharon Feigon**  
Executive Director



**Kevin Karner**  
Project Associate



**Albert Benedict**  
Research Manager



**Peter Lauer**  
Project Associate



**Erin Evenhouse**  
Program Manager



**Colin Murphy**  
Research and Consulting Director



**Rudy Faust**  
Project Associate



**Ellen Partridge**  
Policy and Strategy Director



**Mary Ferguson**  
California Program Manager



**Israel Ramirez**  
Communications Associate



**Leslie Gray**  
Communications Director



**Linda Sloan AICP**  
Operations Director



**Prashanth Gururaja**  
Program Director



**Kimberly Steele**  
Event Director




**Brian Holland**  
California Program Director



**Alvaro Villagran**  
Program Manager





**“The Shared-Use Mobility Center’s impact has grown exponentially in the last three years. While much progress has been made in shared mobility, big challenges remain: addressing transportation access and affordability, climate change and poverty. SUMC is in the perfect position to tackle them. By acting as a liaison between the public and private sectors and a clearinghouse of knowledge and expertise, we can continue to push forward the fundamental changes needed to transform mobility.”**

**Clayton Lane, Board Chair**  
Shared-Use Mobility Center





**The Shared-Use Mobility Center (SUMC)** is a public-interest organization working to foster collaboration in shared mobility (including bikesharing, carsharing, ridesharing and more) and help connect the growing industry with transit agencies, cities and communities across the nation. Through piloting programs, conducting new research and providing advice and expertise to cities and regions, SUMC hopes to extend the benefits of shared mobility for all.



SHARED-USE  
MOBILITY CENTER

**Contact us at:** [info@sharedusemobilitycenter.org](mailto:info@sharedusemobilitycenter.org)

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