Today’s Outcomes...

Understanding of:
1. The components of transit management plans
2. Robust public participation
3. How to create a Coordinated Plan
4. Identifying gaps in service
5. Strategies to implement the Coordinated Plan

“If you don't know where you are going, you'll end up someplace else.”

Yogi Berra
Planning vs. Management

• Planning
  – Identify key strategic issues facing the organization & formulating strategies to manage these issues

• Management
  – Develop an effective process for implementing & managing the strategic initiatives

Transit Management Planning

• Management Plan
  – Strategic plan
  – Marketing plan
  – Market analysis
  – Coordination plan**
  – Financial plan

• City/County/MPO Comprehensive Plan
Transit Management Planning

- A written document that:
  - Precisely defines your business
  - Identifies your goals
  - Serves as the blueprint for your organization
  - Looks back to the previous few years to analyze trends
  - Acts as a launching point for your decision making processes

Transit Management Planning

- A good transit management plan will have:
  - Market & demographic analysis for your service area
  - Company description (including background/history)
  - Organization and management
  - Marketing
  - Funding

Transit Management Planning

- A good transit management plan will have:
  - Financials
  - Consideration of new markets and services
  - Service changes or reductions
  - Evaluation of current services, operations, vehicles, and facilities
  - Five year operating & capital budget plan
Strategic Planning

- A strategic plan is a tool used to define an organization’s:
  - Vision & Mission
  - Core Values
  - Threats & Opportunities
  - Strengths & Weaknesses
  - Short- & Long-term Goals

Strategic Planning

- Guides Business Processes
  - Operating Budget
  - Capital Budget

- Measures Performance
  - Identifies Key Performance Indicators
  - Sets Targets

Mission, Goals and Objectives

- Mission statement
  - A clear and succinct representation of the organization’s purpose for existence
  - The mission statement describes why the public transportation system exists
Mission, Goals and Objectives

• Goals
  – Improves communication
  – Reduces micromanagement
  – Encourages employee innovation
  – Communicates the right message to the public

Mission, Goals and Objectives

• Well written goals are **S M A R T**
  – **S**pecific-easy to understand, no interpretation needed
  – **M**easurable-easy to determine if accomplished
  – **A**ttainable-a challenge, but within reason
  – **R**elevant-linked to the agency’s mission
  – **T**ime limited-must have a timetable

Mission, Goals and Objectives

• Objectives
  – Steps towards achieving a goal
  – Typically 2-3 objectives for each goal
  – Should be aligned with performance measures
    • Measurable
    • Specific
Efficiency PM's
- The relationship of inputs to outputs
- "Doing things right"
- Examples
  - Cost/hour
  - Miles/vehicle

Effectiveness PM's
- The relationship of inputs to objectives
- "Doing the right things"
- Examples
  - Passengers/hour
  - On-time performance
Performance Measures

Efficiency

Effectiveness

Balance

Market Analysis

Service Availability
- Route frequency
- Quality of service
- Hours of service
- Timeliness of service
- Service area

Service Quality
- Vehicle condition
- Vehicle cleanliness
- Driver courtesy
- On-time performance
- Route/schedule convenience

Market Analysis

System Statistics
- Fleet availability
- Capacity used
- Denial rates
- Cancellation rates
- Complaints
- Compliments
- Special requests

Rider & Non-rider Profiles
- Current population
- Population trends
Marketing Plans

- Establish your agency’s identity and promote it - BRANDING
  - Logo
  - Letterhead
  - Brochure
  - Rider’s Guides
  - Vehicle Image
  - Bus Stop Signage
  - On everything that deals with your agency

Financial Plans

- Historical
- Operating statements
- Farebox
- Budget projections (operating, capital, administrative)
- Revenue management
- Full cost allocation
- Audits
Comprehensive planning is a term used in the United States by land use planners to describe a process that determines community goals and aspirations in terms of community development.

The Comprehensive Plan dictates public policy in terms of transportation, utilities, land use, recreation, and housing.

Types of planning:
- City/County Comprehensive Plans
  - 2030/2040 Plan
  - Growth/Annexation Plan
- MPO Comprehensive Plans
  - Long Range Transportation Plan (LRTP)
  - Transportation Improvement Plan (TIP)
  - Transit Development Plan (TDP)
City/County/MPO Planning
• Growth/Annexation Plans
  – Current and future land use plans
  – Focuses on developing areas
  – Addresses future annexation
  – New service areas for transit

City/County/MPO Planning
• Long Range Transportation Plan (LRTP)
  – Provides policy guidance
  – Goals and strategies
  – Regional or statewide consensus
  – Defines vision for transportation
  – Indicates all of the improvements scheduled for funding over the next 20 years

City/County/MPO Planning
• Transportation Improvement Plan (TIP)
  – 4-year program of federally funded transportation projects (including FTA funds)
  – Identifies local transportation priorities, and then funds the improvements
  – Consistent with the LRTP
  – Updated annually
City/County/MPO Planning

- Transit Development Plan (TDP)
  - Multi-year Program of Activities
  - Outlines service improvements and enhancements
  - Coordinated Public Transit Human Services Plan
  - Supports coordination of consolidated activities

City/County/MPO Planning

- Why is it important to integrate transit planning into land use and economic plans?
  - Every $1 communities invest in public transportation yields $4 in economic returns
  - For every $10 million in capital investment into transit, generates $30 million in additional business sales

City/County/MPO Planning

- Why is it important to integrate transit planning into land use and economic plans?
  - A household could save more than $9,700 by using transit and eliminating a car
  - Residential property values perform 42% better on average if they are located near transit with high-frequency service
City/County/MPO Planning

How do we get transit integrated into these plans?
- Know the plans in your agency’s service area
- Know the input process
  - Surveys
  - Meetings
  - Hearings
  - Interviews

City/County/MPO Planning

- Know the stakeholders
  - City/county/MPO staff
  - Elected officials
  - Business leaders
  - Consultants
  - Transportation planners
  - Riders and non-riders
- Know the process to approval
City/County/MPO Planning

TRANSIT RECOMMENDATIONS:

Improve the transit system as recommended and outlined within the 5-year Transit Development Plan (TDP) to conceptually identify options for improving efficiency of the transit system.

Ensure that walkable mixed use centers are easily served by transit, that the physical form accommodates buses, and that pedestrian and bicycle routes lead to transit stops. Transit improvements are an integral part of redevelopment plans for walkable mixed use centers.

Encourage density and reduce minimum parking requirements along arterials and collectors that are designated as transit corridors.

Encourage people to use public transit to and from density nodes.
City/County/MPO Planning

YOU +

GO 2030

= BETTER TOMORROW

City/County/MPO Planning

YOU +

GO 2030

= BETTER TOMORROW

Example of the planning process for a county comprehensive plan...
Planning Step 1

Create Steering Committee
Identify Priority Subject Areas
Prepare Background Studies

Project initiation and background analysis

Planning Step 2

Create Vision
Create Goals and Objectives
Conduct Focus Groups

Vision, goals, objectives and strategies

Planning Step 3

Create Draft Plan
Public Comment
Final Plan

Draft and final plan
5-Year Transit Plan - NCDOT

North Carolina Department of Transportation
Division of Public Transportation
www.ncdot.gov/nctransit

5-Year Plan Elements

1. Guidance for future resources (funding, capital, personnel and training needs)
2. Guidance for expanding public transportation services and mobility options
3. Determination of service priorities

5 Year Plan – North Carolina DOT

5-Year Plan Elements

4. Mission statement, objectives and metrics for performance measurement
5. List of implementable recommendations (from plan elements)
6. Description of public involvement

5 Year Plan – North Carolina DOT
Public Participation

The Coordinated Plan

“Recipients shall certify that the coordinated plan was developed and approved through a process that included participation by seniors, individuals with disabilities, representatives of public, private and non-profit transportation and human service providers, and other members of the public.”

- FTA Circular 9070.1G

Purpose of Public Involvement

• Central to good decision-making
• Enhance quality of service
• Improve public/community relations
• Produce higher quality plans
• It’s a requirement
• It’s the right thing to do
Purpose of Public Involvement

“Develop a public participation strategy that offers early and continuous opportunities for the public to be involved in the identification of social, economic, and environmental impacts of proposed transportation decisions.”

Oregon State Management Plan

Public involvement is woven into every aspect of transit planning

Public Involvement

- Your plan should include a complete description of activities to engage the public
- Your plan should create a Steering Committee to plan, develop and coordinate public engagement strategies
Public Involvement

- Include dialogue with all stakeholders:
  - Public officials
  - TAC members
  - Human service agencies
  - Employers
  - Transit users and non-users
  - Targeted populations
  - Private providers

But, how do we further involve the public to address unmet transit needs?

- Solicit comment
  - Meetings
  - Public hearings
  - Focus groups
  - Surveys
  - Interviews

WE WANT YOU!
Meetings

• Schedule meetings at various times on work days, evenings and weekends
• Use staff, board members, leaders/representatives that reflect the diversity in the community (race, color, culture, national origin, language, faith, age, gender)
• Be prepared to record oral comments as well as collect written statements

Meetings

• Some populations will not participate in meetings conducted in government or government-like buildings
• Select locations near transit (shopping malls, faith based facilities, etc.)
• Offer to provide transportation
• Provide food or refreshments
• Diagrams, charts, maps, handouts

Meetings

• Things to consider…
  – If providing food, provide culturally appropriate food that appeals to that particular population
  – Check calendar for ethnic festivals, carnivals, programs that will draw crowds from the groups you are targeting
Meetings

- Things to consider…
  - Assistance available for sight and/or hearing impaired
  - Oral language interpreters present at meetings and any written materials translated
  - If names are being collected, have a staff person ask for the name & write it down – give the choice

Meetings

- Things to consider…
  - Contact information for individuals needing any special assistance
  - List the decision-makers in attendance
  - How are you going to document the proceedings?

Meetings

- Documentation
  - Sign in sheets
  - Contact information
  - Meeting minutes
  - Audio/video recordings
  - Social media? Facebook Live?
Translation - Interpreter

• The replacement of written text from one language to another
• Translating is different from interpreting - a competent interpreter may or may not be a good translator
• Determining what should be translated should be assisted by the appropriate community organizations

Interpreter Qualifications

• Skilled in English and language to be interpreted
• Trained or familiar with relevant transit terminology
• Committed to maintaining confidentiality
• Free of conflict of interest
• Understanding of role as interpreter and not counselor or legal adviser

Interpreter - Avoiding Problems

• Insufficient advance planning
• Inadequate understanding by interpreter of materials purpose and transportation terminology
• Incorrect translation from computer applications
Interpreter - Avoiding Problems

- Absence of proofreading and review by native speaker
- No oversight of interpreter
- Use of foreign language students or teachers ill-equipped to provide effective interpreter services

Pictures vs. Text Pictographs

No smoking
Keep food and drink in closed containers
Keep feet off seats
Keep pets in carrier (except service animals)
Fold strollers after boarding
Yield
No cycling
No knives
No balloons
No dogs
Activity

- Faith
- Disability
- National Origin
- Seniors
- Color
- Low Income

1. Identify and list three or four barriers that typically limit the participation of members from these communities
2. Select a representative from your group to share your outcomes

Community Outreach

How do you notify the public (including LEP populations)?

- Notices in local newspapers – especially those printed in native languages
- Notices on English and non-English language radio and television stations (PSAs) & call-in shows (interviews)
- Direct mail
- Posters and notices on transit equipment
- Posters at local grocery stores, ethnic shopping areas, laundromats, discount stores & other gathering places
- Ask if you can set up a table in the store or directly in front of a well-frequented, popular store or destination
Community Outreach

Other ways to get the word out...
- Grocery bag stuffers (fast food works, too)
- City/county/tribal newsletters
- Handouts/take home at local schools
- Local colleges, universities
- Sporting events
- Farmer’s markets
- Faith-based events (bulletins)

Get Creative!

Non-traditional Outreach

- Agency website
- Community blogs
- Twitter/Facebook/YouTube
- Podcasts
- Text message information blasts
- Email listservs

Taking Charge of Our Future

A community-led dialogue to set PRIORITIES and SHAPE investments for our FUTURE

Where: Saturday, March 8th, 10:00am-2:00pm
Who: Fort Peck and Fort Belknap Residents, Business Leaders, Educators
Where: Fort Belknap Elementary School (1st and 4th St SW)
Printing generously donated by Gallaudet University

ASL/English interpreting will be provided by student interpreters from the Gallaudet University Department of Interpretation
Activity

• Use the list of barriers created in the previous activity
• Identify and describe specific marketing/advertising strategies that could be used to overcome the identified barriers and why your group thinks they would work
• Report back to the group
Developing and Implementing Coordination Plans

Overview

Three C’s

Coordination

Benefits of Coordination

Challenges

Overview

Identifying Partners

Coordination Planning

Required Elements of the Plan

Implementing the Plan
The Three C’s

Three terms are often used interchangeably in discussing transit partnerships:

- **Cooperation**: Working together in some type of loose association, perhaps focusing primarily on information sharing, in which all agencies retain their separate identities and authorities, including control over the vehicles they own.

- **Consolidation**: One agency retains all operational authority and provides services according to purchase of service agreements or other contractual relationships.
Coordination

Involves joint decision making and actions of two or more agencies with formal arrangements to provide management of the resources and transit within a defined area.

What is Coordination?

- Strategy for managing resources
- Tool for doing more with the resources currently available
- Developing partnerships and cooperation in the delivery of transportation services
- Sharing power among organizations that are working together to achieve common goals.

What is Coordination?

- The best way to stretch scarce resources and improve mobility for everyone
- “Coordination” refers to all sorts of ways in which two or more entities agree to work together toward some common purpose.
Coordination

• The key is to clearly define and communicate what is meant by coordinated transportation to all parties that are potential participants.

Benefits and Challenges

It is crucial to understand and explain the pros and cons of coordination so potential partners do not develop unrealistic expectation.

Benefits of Coordination

• Improvements in service quality
• Increase in service quantity
• Better cost efficiencies
• Increased access for all
Benefits of Coordination

• Greater customer satisfaction
• Increased integration
• Greater productivity
• More options to get to jobs, health care, shopping, etc.

Benefits of Coordination

• Increased activity for local businesses
• Greater visibility for transit
• Enhanced ability of human service and other entities to focus on their primary missions

Benefits of Coordination

• Stronger support and funding commitment from elected officials
• Broader community support for maintaining and expanding transit services
• Could lead to one-stop customer access
• At some point it may lead to increased funding
Challenges
Initially, Coordination may be…

More expensive
More difficult
More time-consuming

Challenges
• Various funding requirements
• Problems with cost allocation
• Match requirements for federal funds
• Regulatory requirements

Challenges
• Perceived incompatibility of goals, needs, or client eligibility
• Unrealistic expectations
• Unequal standards of service quality
Challenges
• May reduce unit costs/trip but not free up transportation $ for other activities
• Coordination agreements can unravel over time with changes in personnel and funding levels

Challenges
• Medicaid Funding
• Head Start Vehicle Specifications
• Confidentiality Concerns
• Billing for Rides

Challenges
• Working with people who are not used to sharing power in relation to their clients
• Crossing over long-standing barriers and boundaries
• Different “political” jurisdictions
Challenges

- Lack of administration funding
- Differences in funding cycles
- Vehicle ownership
- Combining a variety of vehicles and vehicle conditions
- Maintenance philosophies
- Vehicle signage

Challenges

- Fare Equity
- Resistance to Change
  Agency Administration
  Agency Staff
  Passengers

Challenges

- Lack of effort or support from funding sources for coordinated operations
- Inability to understand the true costs of operating transit services
- Personalities
- TIME!
The Coordinated Plan

- Required for the following FTA programs:
  - 5310 - Enhanced Mobility of Seniors and Individuals with Disabilities
  - 5316 - Job Access Reverse Commute (JARC)
  - 5317 – New Freedom

Required Elements

1. Assessment of available services that identifies current transportation providers
   - Public, private, non-profit
   - Inventory of Existing Means of Personal Mobility (your vehicles & other vehicles in the community – i.e., nursing home, adjustment training center, daycares, churches, etc.)

Required Elements

2. Assessment of transportation needs for individuals with disabilities and seniors
   - Stakeholder input
   - Community perceptions
   - Identify gaps in service
   - Other targeted data collection
3. Strategies, activities and/or projects to address the identified gaps between current services and needs
   - Satisfying unmet needs
   - More efficiencies in service delivery
   - Partnerships

4. Priorities for implementation based on resources
   - Time
   - Feasibility of implementation
   - Available physical resources
   - Potential funding sources

The identification of various market segments that are transit dependent and are in need of public transit services, e.g. senior citizens, disabled persons, low income persons, those without access to a vehicle, and youth

Greater Minnesota Transit Plan 2010-2030
Unmet transit needs...

an expressed or identified need which is not currently being met through the existing system of public transportation systems

3 Steps to Determine These Gaps

1. Market research
   • Demographics
   • Census data
   • On-board surveys

2. Technical Analysis
   • Mathematical models
   • Performance measure data

3. Public involvement and community outreach
Strategies to Determine these Gaps

• Community planning session
  – Identify stakeholders
  – Identify needs based on experiences
  – Identify strategies to address needs
  – Set priorities
    • Time
    • Resources
    • Feasibility

• Time
• Resources
• Feasibility

Strategies to Determine these Gaps

• Self-assessment tool
  – Diagnostic questions
  – Assess progress
  – How to develop elements of the plan

www.transit.dot.gov/ccam

A FRAMEWORK FOR ACTION
BUILDING THE EASILY COORDINATED
TRANSPORTATION SYSTEM
A Self-Assessment Tool for Communities

Strategies to Determine these Gaps

• Focus groups
  – Provides greater input for a greater number of stakeholders
  – Opens new dialogue
  – Discuss key strategies and plans for implementation
Strategies to Determine these Gaps

• Surveys
  – Email, in-person, direct mail
  – Accessible to all stakeholder groups
  – Consider data sampling strategies, analysis, sampling, projected return rates

Strategies to Determine these Gaps

• Detailed study/analysis
  – GIS mapping
  – Mathematical models
  – 3rd party consultants
  – Must have available funding or funding partners

Planning Tips

✓ Look at your own internal capacity and capabilities
✓ Assess needs locally and across adjoining service areas
✓ Start with one partner and build upon successes
✓ Constantly assess coordination efforts
Planning Tips
✓ Be patient in the process
✓ Be willing to invest time
✓ Work with individuals and agencies committed to coordination
✓ Be realistic
✓ Do not make promises you cannot keep

Planning Tips
✓ Build trust and a knowledge base among coalition members
✓ Search for consensus
✓ Do not stop when you encounter roadblocks
✓ Establish clear roles & responsibilities
✓ Be flexible & willing to adapt

Planning Tips
✓ Ensure partners are fully vested in process
✓ Work with local decision makers
✓ Put together a transportation advisory committee
✓ Listen to customers
Planning Tips

- Leverage funding
- Educate the public
- Clearly define what services will be provided in contracts

Planning Tips

- Share vehicles to maximize their utility
- Select a lead coordinating agency to function as the mobility manager
- Secure funding

Identifying Potential Partners

- YMCA, YWCA, Boys & Girls Clubs of America
- Park and Recreation Offices
- Shelters
- Red Cross
- Salvation Army
Identifying Potential Partners

- Universities, colleges & technical schools
- English as a Second Language programs
- Taxi and limo companies
- Private transit operators (i.e., Jefferson Lines)

Identifying Potential Partners

- Alcohol & Drug Services
- Rehabilitation Services
- Hospitals & clinics
- Dialysis or Cancer treatment centers or other medical facilities

Identifying Potential Partners

- Vocational & Developmental Disabilities Departments (Adjustment Training Centers/Centers for Independent Living)
- Job Service and Departments of Employment
- Veteran’s Services
Identifying Potential Partners

• Other public transportation providers
• Department of Human Services
• County Social Services
• State and/or County Health Department
• State, Regional or County Mental Health Services

Identifying Potential Partners

• Area Agencies on Aging/Aging Services
• Long-term care facilities & assisted living centers
• Senior and public housing
• Community Action
• Churches and faith-based organizations

Identifying Potential Partners

• Metropolitan or Regional Planning Organizations or economic development office
• County Fair organizers
• Child Daycare Providers
• Adult Day Stay Programs
• Cancer Society
• Local private non-profits (Senior Companions, RSVP)
Identifying Potential Partners

What about the private sector?

• Banks
• Grocery Stores
• Pharmacies
• Beauty Salons
• Wal-Mart, Kmart, and others

Identifying Potential Partners

What about the private sector?

• Restaurants/Cafes
• Industrial Park management
• Technology Park management
• Manufacturing Plants
• Processing Plants

Identifying Potential Partners

• Trip Generators
  – What type of activities, needs, etc. generate the need for transportation? (Be specific and explain the types of trips provided by your agency)
Activity
How many of the sources listed do you currently have formal coordination agreements with?

Activity
List 3 “Potential Partners” from the list that you are not currently working with that you will commit to contact:
1. ___________________
2. ___________________
3. ___________________

Identifying Potential Partners
Share both with potential partners
Pros
Coordination
Cons
Identifying Potential Partners

- Identify who you want to approach
- Plan what you want to say
- Create a bullet list of facts about your transit organization
- Pull together materials to leave with the potential partner about your agency

Identifying Potential Partners

- Learn about their organization
- Attend meetings that are about their needs/concerns in community
- Ask them about their goals for their clients/customers
- Ask about their general needs for their clients/customers (not just mobility needs)

Implementing the Plan

- Collect & carefully monitor fiscal, operating, & client data
- Allocate costs clearly, carefully & fairly
- Market the service
- Make a strong commitment to training
- Develop a clear & comprehensive joint rider’s guide and/or transit policy manual
Implementing the Plan

• Recognize & take advantage of new opportunities
• Purchase services & equipment that meet needs
• Passenger assistance & customer service training for drivers and dispatchers
• Kinds/amounts of funding to pay costs of passenger trips

Implementing the Plan

Increased productivity focuses on:
• Improved accessibility
• Greater adaptability
• More affordability
• Increased availability
  ... of transportation services

Implementing the Plan

Greater efficiencies are achieved by focusing on reducing duplication & fragmentation in:
– operations
– administration
– planning
– funding
Implementing the Plan

You must not break FTA Rules:
• You cannot do charter trips
• You cannot contract for exclusive school transportation

You must clearly define in your Coordination Plan what “working with” means. Comprehensively explain your relationship with your coordination “partners.”

For More Information

TCRP Report 101
Transportation Research Board
Toolkit for Rural Community Coordinated Transportation Services

www.tcrponline.org

For More Information

Federal Transit Administration (FTA)
Coordinating Council on Access and Mobility (CCAM)
United We Ride

www.transit.dot.gov/ccam
Summary

- Know the components of a well documented multi-year transit management plan
- Public participation is not only a requirement, but it is good community dialogue and creates better plans
- Coordination plans are an important part of a balanced community transportation system

Required elements of the Coordinated Plan

1. Assessment of available services (public, private, non-profit)
2. Assessment of needs for seniors and individuals with disabilities
3. Strategies, activities and/or projects to address identified gaps between current services and needs
4. Priorities for implementation based on resources